Sage Oak Charter Schools

Regular Meeting of the Board of Directors

Published on June 5, 2026 at 4:21 PM PDT

Date and Time

Thursday June 11, 2026 at 11:30 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

Link to Join Zoom Meeting
ID: 98399776985
Passcode: 901678

Dial In: (US) +1 360-209-5623
Passcode: 901678

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**			**11:30 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**			**11:32 AM**
A.	Led by Board President or designee		Board President	1 m
III.	**Approve Agenda**			**11:33 AM**
A.	(Action) Approval of Agenda for June 11, 2026 Regular Meeting of the Board of Directors	Vote	Board President	1 m
	It is recommended the Board approve the agenda for the June 11, 2026, 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).			

		Purpose	Presenter	Time

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

IV. Approve Minutes 11:34 AM

		Purpose	Presenter	Time
A.	(Action) Approval of Minutes for May 14, 2026 Regular Meeting of the Board of Directors	Approve Minutes	Board President	1 m

It is recommended the Board approve the minutes from the May 14, 2026, 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 _____

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 11:35 AM

		Purpose	Presenter	Time
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

		Purpose	Presenter	Time

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

VII. Closed Session — 11:36 AM

A. Closed Session Agenda — 12 m

1. CONFERENCE WITH LEGAL COUNSEL - EXISTING LITIGATION
(Gov. Code Section 54956.9(d)(1).)
OAH Case No. 2026040123

2. CONFERENCE WITH LEGAL COUNSEL - EXISTING LITIGATION
(Gov. Code Section 54956.9(d)(1).)
OAH Case No. 2026030514

VIII. Reconvene Regular Meeting — 11:48 AM

A. Report Out Any Action Taken in Closed Session — 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 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. Correspondence/Proposals/Reports — 11:49 AM

A. Sage Oak Highlights — Krista Woodgrift — 14 m

2025-26 School Year in Review

B. Sage Oak Charter Schools Leadership Honoree — Krista Woodgrift — 5 m

Larry King, Senior Director of Outreach & Development

	Purpose	Presenter	Time

XI. Consent Agenda **12:08 PM**

Items listed under the Consent Agenda are considered routine and will be approved 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 - Business Services 1 m

1. Check Register - May 2026
2. Report of Investment Activity - April 2026
3. Ratification of Newfront Property & Casualty Insurance Policy Renewals
4. Approval of Community Provider (CP) and Education Material Resource Provider (EMRP) Agreement Revisions
5. Approval of General Terms and Conditions of the Purchase Order Revisions
6. Ratification of School Services of California, Inc. Agreement for Special Services (Renewal)
7. Ratification of Opichi LLC Sage Central Platform Enhancements Proposal
8. Ratification of Opichi LLC Student Lifecycle Management System Phase 2 Proposal
9. Ratification of Opichi LLC Special Education Assessment Management System Proposal
10. Ratification of Opichi LLC IT Help Desk Proposal
11. Ratification of Javier Mancera Agreement

B. Consent - Education Services 1 m

1. Approval of 2026-27 Sage Oak Charter Schools Title I School-Parent/Guardian Compact
2. Ratification of Riverside Convention Center Revised Contract Addendum
3. Ratification of Courtyard by Marriott Event Sales Agreement Contracts
4. Ratification of Carter's Balloons LLC Decoration Agreements
5. Ratification of RPh on the Go, LLC d/b/a Spindle Addendum (Isidro Herrera)
6. Ratification of RPh on the Go, LLC d/b/a Spindle Addendum (Tina Walker)
7. Ratification of Springhill Suites Corona Riverside Banquet Event Order
8. Ratification of Element Ontario Airport Banquet Event Order
9. Ratification of KID FUNdementals Therapy Center Agreement

	Purpose	Presenter	Time

10. Ratification of Renaissance Quote #358047v2
11. Ratification of Mission San Juan Capistrano Tours/Protocols Waiver
12. Ratification of Segerstrom Center for the Arts Group Sales Order Agreement

C. Consent - Human Resources 1 m

1. Approval of Certificated Personnel Report
2. Approval of Classified Personnel Report
3. Approval of Job Descriptions

D. Consent - Operations & Accountability 1 m

1. Ratification of Springhill Suites by Marriott Temecula Valley Letter of Agreement
2. Ratification of Dos Lagos Golf Course Agreement

E. Consent - Policy Development 1 m

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

3000 Series- Business/Non-Instructional
3010-SO Fiscal Control Policy and Procedures
3015-SO Investment Policy
3100-SO Community Provider Code of Conduct Policy
3130-SO Document Retention Policy

4000 Series- Personnel Services
4015-SO Equal Employment Opportunity Policy
4020-SO Background Check Policy
4035-SO Mandated Reporter- Child Abuse and Neglect Reporting Policy
4045-SO Professional Boundaries Policy
4060-SO Prohibiting Unlawful Harassment, Discrimination, and Retaliation Policy
4070-SO Lactation Accommodation Policy
4145-SO Professional Development Reimbursement Policy
4145E-SO Professional Development Reimbursement Policy Exhibit *(Rescind)*

5000 Series- Student Services
5010-SO Educational Records and Student Information Policy
5110-SO Cell Phones, Smartphones, Pagers, & Other Electronic Signaling Devices Policy

		Purpose	Presenter	Time

6000 Series- Instruction
6010-SO Independent Study Policy
6015-SO Comprehensive Sexual Health Education Policy
6035-SO Mathematics Placement Policy
6040-SO Assessment Policy
6060-SO Special Education Assessment Request Policy
6070-SO Independent Educational Evaluation Policy
6075-SO Special Education Certificate of Completion
6115-SO Attendance, Support, and Involuntary Disenrollment Policy
6125-SO Report Card Policy
6210-SO Graduation Policy

F. (Action) Approval of Consent Agenda — Vote — Board President — 1 m

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
Susan Houle
Peter Matz
Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

XII. Business Services — 12:14 PM

A. (Action) Approval of Proposition 28 Arts and Music in Schools Funding, 2025-26 Annual Reports & Certifications for Sage Oak Charter Schools — Vote — Tim O'Brien — 1 m

It is recommended the Board approve the Proposition 28 Arts and Music in Schools Funding, 2025-26 Annual Reports and Certifications as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).

Fiscal Impact: None

		Purpose	Presenter	Time

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

B. (Action) Approval of 2026–27 Consolidated Application and Reporting System (CARS) — Vote — Tim O'Brien — 1 m

It is recommended the Board approve the 2026-27 data collections for submission to the Consolidated Application and Reporting System (CARS) 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 _____ Seconds by _____ Ayes _____ Nays _____ Absent _____

XIII. Education Services — 12:16 PM

A. (Action) Approval of IXL Learning Quote Renewal — Vote — Erin Bunch — 1 m

It is recommended the Board approve the renewal of the IXL Learning quote through June 30, 2028, to provide students with access to English language arts, math, science, and social studies curriculum for Sage Oak Charter School (#1885), Sage Oak Charter School – Keppel (#1886), and Sage Oak Charter School – South (#2051).

Fiscal Impact: $76,925

Sage Oak Charter School (#1885)	$60,479
Sage Oak Charter School - Keppel (#1886)	$7,077
Sage Oak Charter School - South (#2051)	$9,369

	Purpose	Presenter	Time

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

XIV. Human Resources 12:17 PM

A. (Action) Approval of Revised 2026-27 Salary Schedules — Vote — Tamar Kataroyan — 3 m

It is recommended the Board approve the revised 2026–27 salary schedules, which reflect a total COLA increase of 4.3%, effective July 1, 2026, as presented for Sage Oak Charter School (#1885), Sage Oak Charter School – Keppel (#1886), and Sage Oak Charter School – South (#2051).

This amount incorporates the 2.5% COLA previously approved by the Board in March 2026 and the additional COLA funding included in the State's May Revision. The salary schedules also include updates to the teacher class-size overage compensation structure, which will transition to a fixed amount based on grade-level bands beginning in 2026-27.

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

B. (Action) Approval of Spark Hire Order Form Renewal — Vote — Tamar Kataroyan — 1 m

It is recommended the Board approve the renewal of the Spark Hire agreement through July 8, 2029, to provide one-way virtual interview services in support of recruitment efforts at Sage Oak Charter School (#1885), Sage Oak Charter School – Keppel (#1886), and Sage Oak Charter School – South (#2051).

Fiscal Impact: $14,514

	Purpose	Presenter	Time

Sage Oak Charter School (#1885) $11,411
Sage Oak Charter School - Keppel (#1886) $1,335
Sage Oak Charter School - South (#2051) $1,768

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

XV. Operations & Accountability

12:21 PM

A. (Action) Approval of 2026-27 Sage Oak Charter Schools English Learner Master Plan — Vote — Jodi Cope — 4 m

It is recommended the Board approve the 2026-27 English Learner (EL) Master Plan 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 _____

XVI. Policy Development

12:25 PM

A. (Action) Approval of New 4155-SO Employee Recognition and Awards Policy — Vote — Tamar Kataroyan — 2 m

It is recommended the Board approve the new 4155-SO Employee Recognition and Awards Policy 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

	Purpose	Presenter	Time

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

XVII. Public Hearing 12:27 PM

A.	(Hearing) 2026-27 Local Control and Accountability Plans (LCAP)	Discuss	Jodi Cope	12 m

Education Code Section 47606.5 states that a charter school's Governing Board shall hold a public hearing as part of the process to adopt Local Control and Accountability Plans (LCAPs). This public hearing is for the 2026-27 LCAPs, Federal Addendums, and LCFF Budget Overview for Parents for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).

1. 2026-27 Local Control and Accountability Plan_Sage Oak Charter School (#1885)
2. 2026-27 Local Control and Accountability Plan_Sage Oak Charter School - Keppel (#1886)
3. 2026-27 Local Control and Accountability Plan_Sage Oak Charter School - South (#2051)
4. 2026-27 LCFF Budget Overview for Parents_Sage Oak Charter School (#1885)
5. 2026-27 LCFF Budget Overview for Parents_Sage Oak Charter School - Keppel (#1885)
6. 2026-27 LCFF Budget Overview for Parents_Sage Oak Charter School - South (#2051)

Hearing Open: _____

Hearing Closed: _____

The proposed 2026-27 Local Control Accountability Plans (LCAP) for Sage Oak Charter Schools are available for review on the Sage Oak Charter Schools website. The 2026-27 Local Control Accountability Plans (LCAP) vote for adoption will occur at the Regular Board of Directors Meeting on June 18, 2026.

		Purpose	Presenter	Time
B.	(Hearing) 2026-27 Proposed July Budget - Sage Oak Charter Schools	Discuss	Tim O'Brien	12 m

It is recommended the Sage Oak Charter School's Governing Board hold a public hearing as part of the process to adopt the 2026-27 Proposed July Budget for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).

1. 2026-27 Proposed July Budget - Sage Oak Charter Schools
2. 2026-27 LCFF Budget Overview for Parents_Sage Oak Charter School (#1885)
3. 2026-27 LCFF Budget Overview for Parents_Sage Oak Charter School - Keppel (#1885)
4. 2026-27 LCFF Budget Overview for Parents_Sage Oak Charter School - South (#2051)
5. Education Protection Account (EPA) - Sage Oak Charter School (#1885)
6. Education Protection Account (EPA) - Sage Oak Charter School - Keppel (#1886)
7. Education Protection Account (EPA) - Sage Oak Charter School - South (#2051)

Hearing Open: _____

Hearing Closed: _____

The 2026-27 Proposed July Budget is available for review on the Sage Oak Charter Schools website. The 2026-27 Proposed July Budget vote for adoption will occur at the Regular Board of Directors meeting on June 18, 2026.

XVIII. Calendar

The next scheduled meeting will be a Regular Board of Directors Meeting held on June 18, 2026.

XIX. Comments **12:51 PM**

A.	Board Comments	3 m
B.	Superintendent Comments	2 m

		Purpose	Presenter	Time
XX.	**Closing Items**			**12:56 PM**
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 May 14, 2026 Regular Meeting of the Board of Directors

Section:	IV. Approve Minutes
Item:	A. (Action) Approval of Minutes for May 14, 2026 Regular Meeting of the Board of Directors
Purpose:	Approve Minutes
Submitted by:	
Related Material:	Minutes for Regular Meeting of the Board of Directors on May 14, 2026

APPROVED

Sage Oak Charter Schools

Minutes

Regular Meeting of the Board of Directors

Date and Time
Thursday May 14, 2026 at 12:00 PM

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

Link to Join Zoom Meeting
ID: 91006723171
Passcode: 668033

Dial In: (US) +1 719-359-4580
Passcode: 668033

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REASONABLE ACCOMMODATION WILL BE PROVIDED FOR ANY INDIVIDUAL WITH A DISABILITY
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Directors Present
M. Humphrey, P. Matz, S. Fraire, S. Houle, W. Hall

Directors Absent
None

Guests Present
B. Bookser, C. Anema, E. Horta, K. Woodgrift, L. Snee, M. Persley, T. King

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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 May 14, 2026 at 12:04 PM.

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 Agenda

A. (Action) Approval of Agenda for May 14, 2026 Regular Meeting of the Board of Directors

S. Houle made a motion to W. Hall, Board President, to approve the agenda as presented for the May 14, 2026, Regular Meeting of the Board of Directors.
S. Fraire seconded the motion.
The board **VOTED** unanimously to approve the motion.

IV. Approve Minutes

A. (Action) Approval of Minutes for March 12, 2026 Regular Meeting of the Board of Directors

S. Houle made a motion to approve the minutes as presented from the Regular Meeting of the Board of Directors on 03-12-26.
P. Matz seconded the motion.
The board **VOTED** unanimously to approve the motion.

B. (Action) Approval of Minutes for April 9, 2026 Board of Directors Study Session

S. Houle made a motion to approve the minutes as presented from the Board of Directors Study Session on 04-09-26.
M. Humphrey seconded the motion.
The board **VOTED** unanimously to approve the motion.

V. Public Comment - Closed Session

A. Public Comment

There was no request for public comment regarding Closed Session.

VI. Adjourn to Closed Session

A. The Board Will Consider and May Act on Any of the Closed Session Matters

P. Matz made a motion to W. Hall, Board President, to adjourn to Closed Session at 12:07 p.m.
S. Houle seconded the motion.
The board **VOTED** unanimously to approve the motion.

VII. Closed Session

A. Closed Session Agenda

1. PUBLIC EMPLOYEE PERFORMANCE EVALUATION
Pursuant to Gov. Code 54957
Annual Performance Evaluation, Superintendent of Schools/CEO

VIII. Reconvene Regular Meeting

A. Report Out Any Action Taken in Closed Session

The Regular Meeting of the Board of Directors reconvened at 12:18 p.m.

W. Hall, Board President, reported no action was taken in Closed Session.

IX. Public Comments/Recognition/Reports

A. Public Comment

There was no request for public comment.

X. Correspondence/Proposals/Reports

A. Principals' Year in Review

Chelsey Anema, Director II, Personalized Learning/Principal, Lana Beshara, Director II, Virtual Learning/Principal, and Traci King, Director II, Secondary Education/High School Principal, presented the 2025-26 school year in review.

B. Introduction of New Chief Technology Officer

Dr. Tamar Kataroyan, Assistant Superintendent of Human Resources, introduced Todd Ryckman as the new Chief Technology Officer.

C. Introduction of New Chief of Outreach & Development

Dr. Tamar Kataroyan, Assistant Superintendent of Human Resources, introduced Dr. Richard Noblett as the new Chief of Outreach & Development.

D. CliftonLarsonAllen LLP (CLA) Governance Entrance Letter

Tim O'Brien, Assistant Superintendent of Business Services, reviewed the Governance Entrance Letter from CliftonLarsonAllen LLP (CLA).

XI. Consent Agenda

A. Consent - Business Services

1. Check Register - March 2026
2. Check Register - April 2026
3. Report of Investment Activity - February 2026
4. Report of Investment Activity - March 2026
5. Ratification of Javier Mancera Agreement
6. Ratification of Opichi LLC Sage Oak Virtual Class Portal Proposal
7. Ratification of Opichi LLC Oakschool Enrollment Tool Proposal
8. Ratification of Opichi LLC School Pathways SIS Integration Proposal
9. Ratification of Cvent Inc. Quote Number: Q-2092390
10. Ratification of California Charter Schools Association Membership Agreement (Renewal)
11. Ratification of Otter.ai, Inc. Quote Number: Q007817 (Renewal)
12. Ratification of Education Leadership Services Letter of Agreement
13. Ratification of 2026-27 BoardOnTrack Membership Agreement (Renewal)

14. Ratification of Association of Personalized Learning Schools & Services (APlus+), Contract Services Agreement (Renewal)
15. Ratification of Red Herring Amendment to Agreement with San Diego County Superintendent of Schools

B. Consent - Education Services

1. Ratification of Revised 2025-26 Special Education Contracted Vendors List
2. Ratification of Mutual Hold Harmless Agreement between the San Bernardino Community College District and Sage Oak Charter Schools
3. Ratification of Redlands Pottery Project Group Class Waiver Form (Oakschool Class)
4. Ratification of Redlands Pottery Project Group Class Waiver Form (Field Trip)
5. Ratification of OC Stuttering Center Independent Educational Evaluation Service Agreement
6. Ratification of Murrieta Parks Facility Reservation Form
7. Ratification of Amira Learning Quote Number 90340 (Renewal)
8. Ratification of AVID Center Products and Services Quote/Order #Q-92802 (Renewal)
9. Ratification of Rossmoor Community Services District Facility Use Permit
10. Ratification of Timestamp Photo Booth LLC Contract
11. Ratification of RPh on the Go, LLC d/b/a Spindle Agreement
12. Ratification of RPh on the Go, LLC d/b/a Spindle Agreement Addendum A
13. Ratification of Titan Tent & Event Rentals Agreement
14. Ratification of Town of Apple Valley Facility Use Agreement
15. Ratification of Glazed and Confused Catering Agreement
16. Ratification of Watchmen Patrol Proposal
17. Ratification of Riverside Convention Center Contract
18. Ratification of Marriott Riverside at the Convention Center Group Sales Agreement
19. Approval of 2026-27 Sacramento Overnight Field Trip Request (Grades 8-12) and Educational Discovery Tours Letter of Understanding
20. Approval of 2026-27 New York City Overnight Field Trip Request (Grades 9-12) and Educational Discovery Tours Letter of Understanding
21. Ratification of Chaffey College Chino Community Center Facility Rental Contract
22. Ratification of Ayres Hotel Seal Beach Contract (PLC)
23. Ratification of Zearn Master Services Agreement (Renewal)
24. Ratification of Springhill Suites Corona Riverside Banquet Event Orders
25. Ratification of All Occasion Rentals Estimate #21635
26. Ratification of Bright Thinker Order Forms #SQ-2036 & #SQ-2037 (Renewal)

C. Consent - Human Resources

1. Approval of Certificated Personnel Report
2. Approval of Classified Personnel Report

3. Approval of Job Descriptions
4. Approval of 2026-27 Certificated Employee Work Year Calendars
5. Approval of 2026-27 Classified Employee Work Year Calendars
6. Approval of Change to Employer Contribution Rates for Employee Benefits Plans
7. Ratification of UKG, Inc. Order Form (Renewal)
8. Ratification of Leonard and Company, Inc. Invoice #19051405

D. Consent - Operations & Accountability

1. Ratification of ScubaCat Educational Data, LLC Contract
2. Ratification of 2026-27 ScubaCat Educational Data, LLC Contract (Renewal)
3. Ratification of Energage Service Order
4. Approval of Wavelength Automation LLC Subscription Form (CapitolTrack)
5. Ratification of Tech & Mortar LLC Statement of Work (Renewal)
6. Ratification of Fairfield Inn & Suites Riverside Corona/Norco Event Space Agreement

E. (Action) Approval of Consent Agenda

M. Humphrey made a motion to W. Hall, Board President, to approve the Consent Agenda as presented.
P. Matz seconded the motion.
The board **VOTED** unanimously to approve the motion.

XII. Board Governance

A. (Action) Approval of Amended and Restated Articles of Incorporation of Sage Oak Charter Schools

S. Houle made a motion to W. Hall, Board President, to approve the Amended and Restated Articles of Incorporation of Sage Oak Charter Schools as presented, including revised dissolution language in accordance with CalSTRS Employer Directive 2026-01.
S. Fraire seconded the motion.
The board **VOTED** unanimously to approve the motion.

XIII. Education Services

A. (Action) Approval of San Joaquin County Office of Education (CODESTACK) Multi-Year Memorandum of Contract

S. Houle made a motion to W. Hall, Board President, to approve the San Joaquin County Office of Education multi-year Memorandum of Contract as presented.
M. Humphrey seconded the motion.
The board **VOTED** unanimously to approve the motion.

XIV. Human Resources

A. (Action) Approval of Declarations of Need (DON) for the 2026-27 School Year

P. Matz made a motion to W. Hall, Board President, to approve the 2026-27 Declarations of Need (DON) for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051) as presented.
S. Houle seconded the motion.
The board **VOTED** unanimously to approve the motion.

XV. Operations & Accountability

A. (Action) Approval of Parsec Education Multi-Year Contract

S. Fraire made a motion to W. Hall, Board President, to approve the multi-year Parsec Education contract as presented.
S. Houle seconded the motion.
The board **VOTED** unanimously to approve the motion.

XVI. Policy Development

A. (Action) Approval of Resolution Regarding Compliance with Court Orders in Mirabelli v. Olson

S. Houle made a motion to W. Hall, Board President, to approve the resolution regarding compliance with court orders in Mirabelli v. Olson as presented. This resolution acknowledges the current legal status of the injunction and affirms Sage Oak's continued implementation of Policy 5070-SO in accordance with applicable law.
M. Humphrey seconded the motion.
The board **VOTED** unanimously to approve the motion.

XVII. Calendar

A. Future Meetings

The next scheduled meeting will be a Regular Board of Directors Meeting held on June 11, 2026.

XVIII. Comments

A. Board Comments

Board members expressed appreciation for the organization's leadership, staff, and commitment to students and welcomed the new Chief of Technology and Chief of Outreach & Development to Sage Oak. The Board commended Superintendent Woodgrift's leadership, dedication, and success in attracting exceptional staff.

B. Superintendent Comments

Superintendent Woodgrift invited the Board to attend Sage Oak's graduation ceremony on June 2, 2026, in Fullerton and thanked Board President Hall and Board Clerk Fraire for attending the recent Coffee Talk with support staff. She also recognized the principals for their outstanding leadership, teamwork, and commitment to supporting Sage Oak students and staff.

XIX. 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 May 14, 2026.
S. Houle seconded the motion.
The board **VOTED** unanimously to approve the motion.
There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 1:07 PM.

Respectfully Submitted,
W. Hall

Documents used during the meeting

- Sage Oak Highlights_March & April 2026.pdf
- Principals' Year in Review Presentation_2025-26.pdf
- CliftonLarsonAllen LLP Governance Entrance Letter_4.29.2026.pdf
- BUS Consent - Business Services.pdf
- BUS Consent - Education Services.pdf
- BUS Consent - Human Resources.pdf
- BUS Consent - Operations & Accountability.pdf
- Amended and Restated Articles of Incorporation of Sage Oak Charter Schools_Redline.pdf
- San Joaquin County Office of Education (CODESTACK) Multi-Year Memorandum of Contract.pdf
- 2026-27 Declaration of Need_Sage Oak Charter School (#1885).pdf
- 2026-27 Declaration of Need_Sage Oak Charter School - Keppel (#1886).pdf
- 2026-27 Declaration of Need_Sage Oak Charter School - South (#2051).pdf
- Parsec Education Multi-Year Contract.pdf
- Resolution Regarding Compliance with Court Orders in Mirabelli v. Olson.pdf

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FOR MORE INFORMATION

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

Coversheet

Sage Oak Highlights

Section: X. Correspondence/Proposals/Reports
Item: A. Sage Oak Highlights
Purpose:
Submitted by:
Related Material: Sage Oak Highlights_May & June 2026.pdf

2025-26

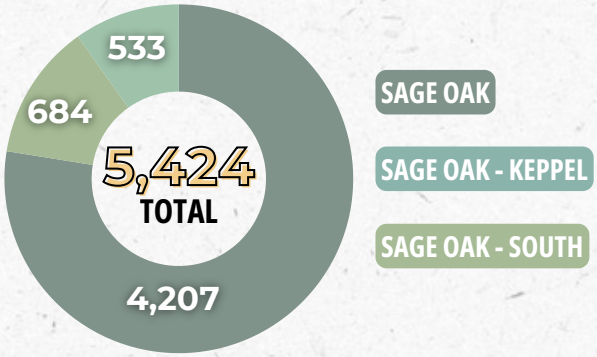
SAGE OAK CHARTER SCHOOLS

MAY & JUNE HIGHLIGHTS

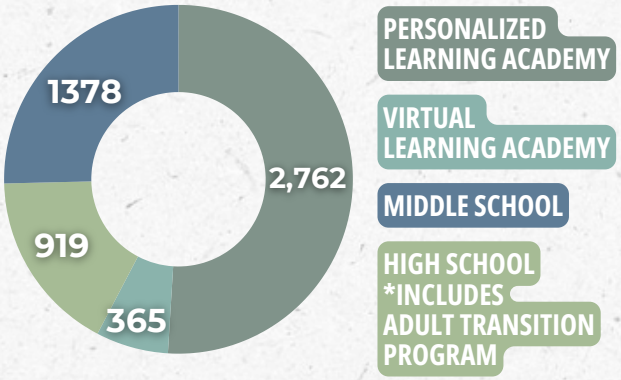
Excellence through Personalized Learning

CURRENT ENROLLMENT

BY SCHOOL



BY PROGRAM



A LOOK INSIDE THIS ISSUE....

GOAL #1 FEATURED HIGHLIGHT

Over 900 Kindergarten, 5th, and 8th-grade students were promoted through our VLA and PLA programs, and **201** seniors graduated with the Class of 2026!

GOAL #2 FEATURED HIGHLIGHT

The end-of-year Staff Pulse Check survey reflected that 94.6% of staff rated their job satisfaction at an average of 4.48 out of 5. Parents also took an end-of-year survey and rated Sage Oak an average of 4.8 out of 5.

Professional Development 🔗

GOAL #3 FEATURED HIGHLIGHT

Sage Oak's new Community Provider Review Tool makes it easier for families to find service providers nearby with just a few clicks.

3,751 enrollment applications received for the 2026–27 school year, a 26.10% increase from last year.

Personalized Learning Academy	Virtual Learning Academy	High School
2,737	707	307

Powered by BoardOnTrack

GOAL #1: STUDENT SUCCESS

College & Career Readiness in Action

The high school counseling team helped students build career readiness through mock interviews and Senior Seminar, a course that prepares students for life after high school. Students practiced professional interview skills with community volunteers and completed interviews through Spark Hire, a virtual interview platform, with **100% reporting feeling better prepared and 65 seniors completing virtual interviews.**

Sage Oak Scholarships Are a Success!

Sage Oak celebrated it's first-ever Class of 2026 Scholarship Awards during a Zoom ceremony, **recognizing 18 graduating seniors** for leadership and Sage Oak's core values. The inaugural program awarded $10,000 in scholarships.

Decision Day

On May 26th, Sage Oak hosted a virtual Decision Day Celebration to recognize the post-graduation plans of the Class of 2026. The event highlighted 40 seniors pursuing four-year universities, community colleges, trade and technical programs, military service, and career opportunities, celebrating their achievements and next steps beyond Sage Oak.

GOAL #1: STUDENT SUCCESS

GRADUATION & PROMOTION CEREMONIES

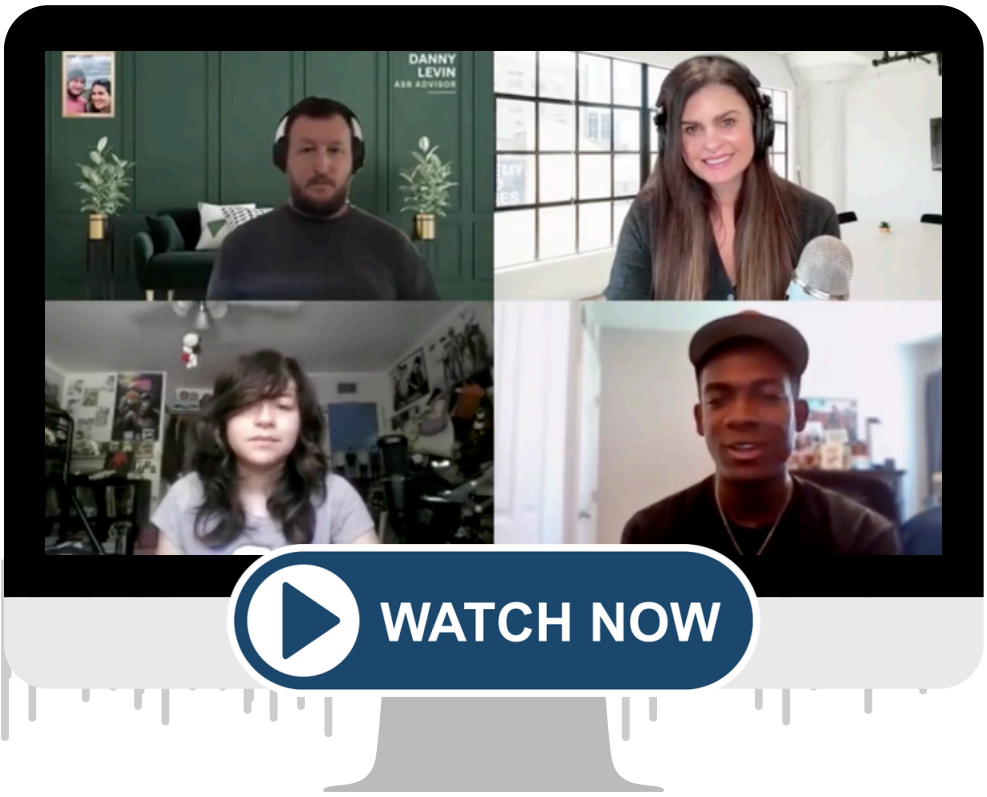
Sage Oak Celebrates Class of 2026 Graduates and Student Promotions

Sage Oak proudly celebrated graduation and promotion ceremonies marking important academic milestones for students and families. More than 900 Kindergarten, 5th grade, and 8th grade students promoted, and 201 seniors graduated as part of the Class of 2026. These celebrations recognized students' hard work and growth as they prepared for their next chapter at Sage Oak and beyond.

GOAL #1: STUDENT SUCCESS

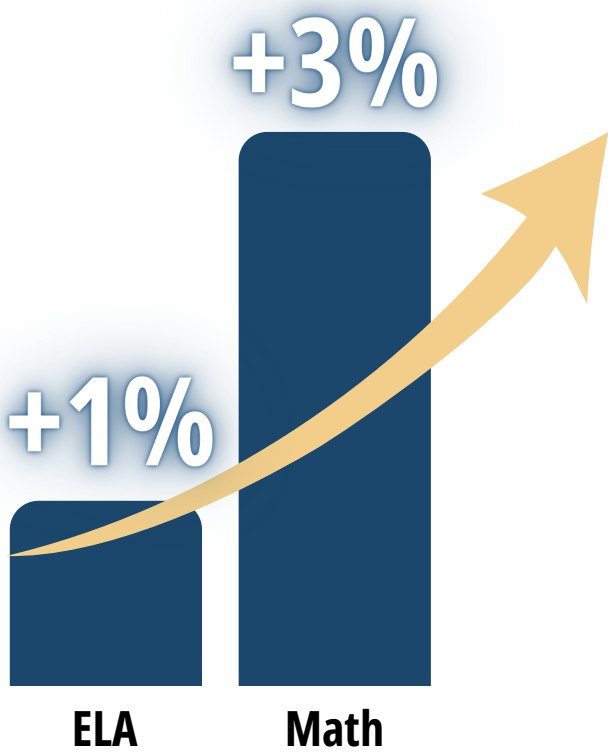
A Look Inside Student Leadership at Sage Oak

In this episode, host Tiffiny Webster welcomes ASB (Associated Student Body), advisor Danny Levin, and students Izzy Dyer, Ava Mendes, and Ezra Williams to explain Sage Oak's ASB program, an A–G elective that builds leadership, community, and collaboration skills through weekly meetings, committees, and school events.



Big Participation, Bright Results

Sage Oak students in grades K–11 completed i-Ready testing with **a 99.9% participation rate.** Preliminary results showed a 1% increase in English language arts and a 3% increase in math for students performing at or above grade level, meeting or exceeding Sage Oak's annual goal one target.



Exploring Trade School Pathways

In this episode, host Tiffiny Webster welcomes Coral Prendergast, High School Counselor, to discuss growing student interest in the trade school pathway. Coral shared career options, including electrician, welder, construction, cosmetology, firefighter, and EMT. She also highlighted a trade school resource hub with community college program search tools, and industry-sector tabs with descriptions and certifications students can pursue in high school.

The AVID Advantage

Middle school students in Oakschool's AVID elective built academic habits, organization, and confidence through goal setting, time management, collaboration, communication, and the AVID WICOR (Writing, Inquiry, Collaboration, Organization, and Reading) framework.

GOAL #2: ENGAGEMENT

Student Leaders Create Cool Connections

Inspired by the California Association of Student Leaders Leadership Conference, middle school student leaders organized a hangout at Great Park Ice Rink in Irvine for middle and high school students. They planned skating lessons, snack bags, and ice time, creating a welcoming experience for all 21 students who attended.

Sharing Sage Oak's Success with Our Authorizer

Larry King, Senior Director, Outreach and Development, presented Sage Oak's annual authorizer updates at the Keppel Union School District board meeting on May 21st. The presentation highlighted student engagement, college and career readiness, family feedback, budget and enrollment updates, intervention supports, and school recognitions.

Marine Science Comes to Life

Oakschool and Personalized Learning Academy students explored marine science at Heal the Bay Aquarium through touch tanks, microscopes, and animal encounters. Students learned about ocean habitats and participated in a "Microscope Safari", a hands-on lab activity looking through high-powered microscopes to discover hidden marine life and tiny ocean organisms.

GOAL #2: ENGAGEMENT

Director Team Meeting: Celebrating Progress & Planning for the Future

At the May 27th Director Team Meeting, Sage Oak leaders celebrated student achievement, student group data highlights, and recent awards and recognitions. The team also began strategic planning for the next three-year LCAP (Local Control and Accountability Plan) cycle and reviewed Sage Central updates and budget timelines.

Sage Oak Families Share the Love

4.8 /5 STARS

The 2025–26 Sage Oak Parent Survey received 868 responses across all programs. Families rated overall program satisfaction an **average of 4.8 out of 5 stars**, and teacher support an average of 4.9 out of 5 stars, with families highlighting strong staff support, program flexibility, and meaningful student and family relationships.

Staff Survey Shows Strong Year-End Results

The May 2026 End-of-Year Staff Pulse Check received 224 responses across all departments, reflecting the strongest satisfaction rating of the 2025-26 school year: **94.6% of staff rated job satisfaction at 4 or 5** (average 4.48), and supervisor effectiveness received **4.84 out of 5 stars,** with 97.8% rating their supervisor a 4 or 5 stars. Staff consistently describe Sage Oak's culture as supportive, positive, and student-centered, and name flexibility, strong supervisor relationships, and collaboration as their top drivers of satisfaction.

Professional growth satisfaction also saw the biggest measurable year-over-year gain, rising from 82.7% in May 2025 to 93.3% in May 2026.

GOAL #2: ENGAGEMENT

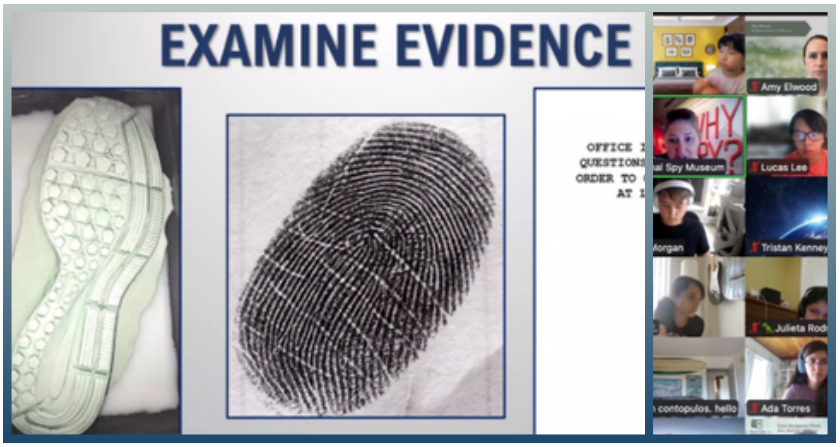
Service In Action

NJHS OC United Service Project

Sage Oak National Junior Honor Society students partnered with Orange County United for a Service Day and Donation Drive, helping unload, organize, and distribute food and essential items to approximately **80 local families**. Students demonstrated teamwork, leadership, and compassion while making a positive impact in the community.

NHS Students Help at Farmstrong Rescue

Twenty National Honor Society students, along with advisor Kayce Betzel, volunteered at Farmstrong Rescue in Redlands. Students helped clean, feed, and care for rescue animals while learning about animal rescue and the importance of compassionate care.



Cracking the Case at the International Spy Museum

Students participated in two virtual International Spy Museum workshops, using forensic clues and secret codes to solve challenges. Through “Forensics in Espionage” and “Operation Code Cracker,” students strengthened critical thinking, problem-solving, collaboration, and science and math skills through interactive learning.

GOAL #2: ENGAGEMENT

High School HIGHLIGHTS

The Magic of Grad Nite

Sage Oak Seniors attended this year's Disneyland Grad Nite to cultivate peer-to-peer connections and celebrate in a dynamic, real-world setting. Nearly 40 students enjoyed a full day of fun strengthening and building bonds. The experience culminated in an exclusive, high-energy celebration event at California Adventure, successfully reinforcing a sense of class unity, shared achievement, and lifelong memories as they transitioned to the next chapter.

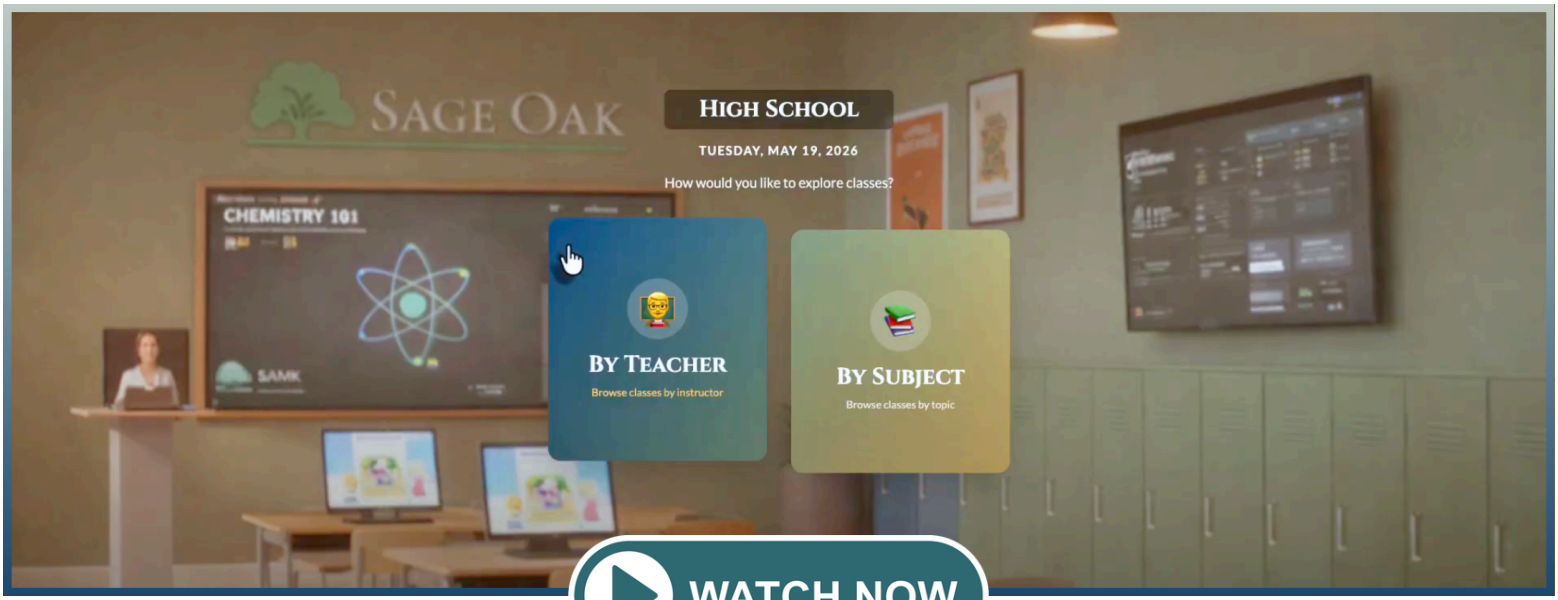
UC Riverside Tour

On May 3rd, students and parents joined AVID teacher Mandy Bates for a campus tour of UC Riverside, where they explored academic programs, student life and the many opportunities available at a four-year university.

The Sun Sets on Senior Year

On Friday, May 29th, students from the Class of 2026 gathered at Bolsa Chica State Beach in Huntington Beach to close out their final year of high school. S'mores were made, yearbooks were signed, and students shared memories from the last four years as well as hopes and plans for the future.

GOAL #3: SMART LEARNING SYSTEMS

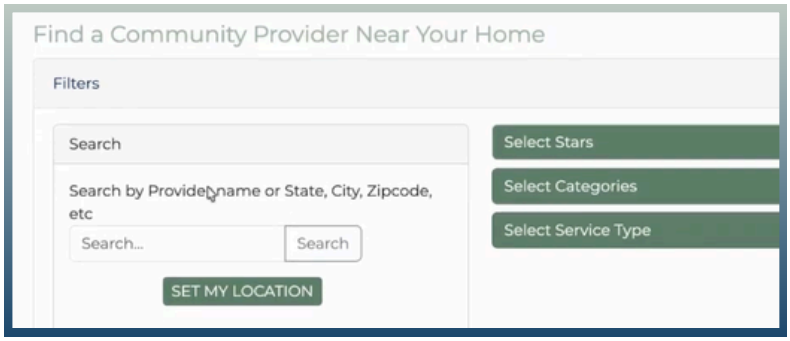


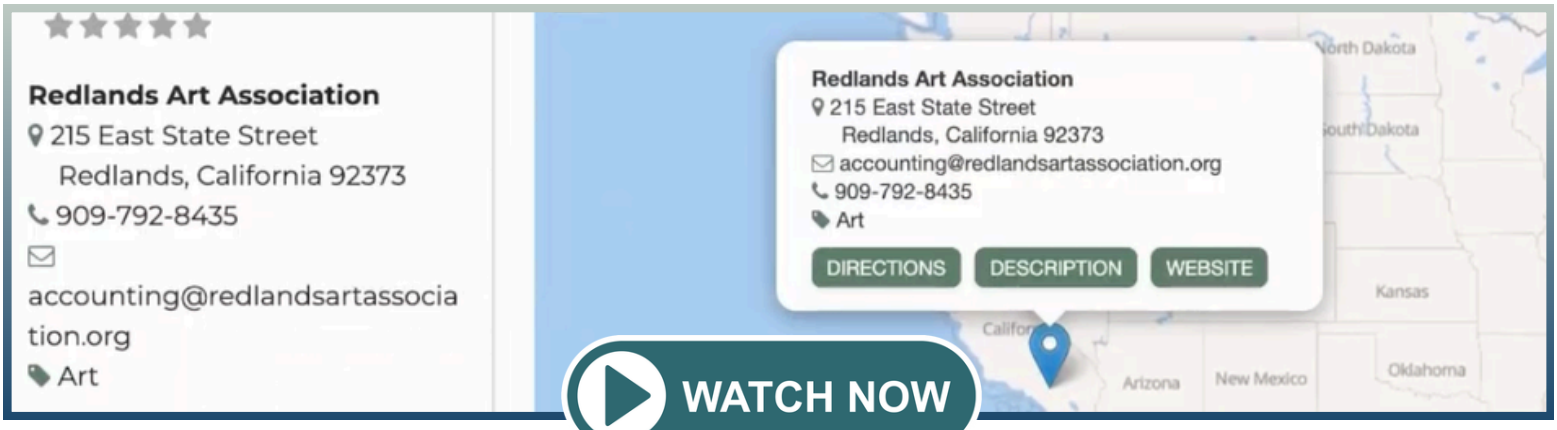
A Portal to Virtual Learning

Sage Oak completed development of the Virtual Class Portal, a centralized platform that provides Sage Oak leaders with a real-time view of virtual class offerings across all programs. The portal allows staff administrators to monitor classes by program, teacher, subject, and schedule, while using secure access and an Artificial Intelligence (AI) Concierge to support navigation and questions.

Community Provider Search Made Simple

Sage Oak completed the Community Provider Review Tool, a searchable map-based directory that helps families find credentialed service providers in their area. Families can search by keyword, filter results, choose a mileage radius, and view updated provider options on an interactive map from any desktop or mobile device.





Coversheet

Consent - Business Services

Section: XI. Consent Agenda
Item: A. Consent - Business Services
Purpose:
Submitted by:
Related Material: BUS Consent - Business Services.pdf

SAGE OAK CHARTER SCHOOLS
Regular Meeting of the Board of Directors - June 11, 2026
BUS Consent Items - Business Services

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

1. **Item:** **Check Register - May 2026**

2. **Item:** **Report of Investment Activity - April 2026**

3. **Item:** **Ratification of Newfront Property & Casualty Insurance Policy Renewals**

4. **Item:** **Approval of Community Provider (CP) and Education Material Resource Provider (EMRP) Agreement Revisions**
   Redline Version

   Background:
   Sage Oak Charter Schools requests that the Board approve the revisions to the Community Provider (CP) and/or Educational Material Resource Provider (EMRP) Agreement, which update policy references throughout the agreement and add a new provision requiring compliance with SB 848 by requiring contractors whose duties involve contact with or supervision of pupils to complete annual mandated reporter training, upload certificates of completion to the School's Vendor Portal, and make those records available upon request. No other substantive changes appear in the agreement.

   Recommendation:
   It is recommended the Board approve the Community Provider (CP) and Education Material Resource Provider (EMRP) Agreement as presented.

5. **Item:** **Approval of General Terms and Conditions of the Purchase Order Revisions**
   Redline Version

   Background:
   Sage Oak Charter Schools requests that the Board approve the revisions to the General Terms and Conditions of the Purchase Order, which add a Mandated Reporter Training section requiring contractors whose duties involve contact with or supervision of pupils to complete annual mandated reporter training in compliance with SB 848 and to maintain certificates of completion for review upon request. No other substantive changes appear in the policy.

   Recommendation:
   It is recommended the Board approve the General Terms and Conditions of the Purchase Order as presented.

6. **Item:** **Ratification of School Services of California, Inc. Agreement for Special Services (Renewal)**

   Background:
   Sage Oak Charter Schools requests the Board ratify the renewal agreement with School Services of California (SSC) for special services related to school finance, including electronic delivery of the Fiscal Report, analysis of major school legislation, and consulting services. This expense was approved on March 12, 2026, as part of the 2026–27 Strategic Budget Plan.

Recommendation:
It is recommended the Board ratify the School Services of California, Inc. Agreement for Special Services as presented.

7. **Item: Ratification of Opichi LLC Sage Central Platform Enhancements Proposal**

Background:
Sage Oak Charter Schools requests the Board ratify the Opichi LLC proposal for Sage Central Platform Enhancements. The proposal builds on the already-approved Sage Central project by continuing development of the platform's core tools, including improved chat features, hub organization, navigation updates, bookmark importing, and a Chrome extension for saving bookmarks directly to a user's personal Sage Central dashboard. These enhancements will improve staff and user access to resources, make Sage Central easier to navigate, and support more efficient use of the platform. The expense was approved per Sage Oak Charter Schools' Fiscal Policy.

Recommendation:
It is recommended the Board ratify the Opichi LLC Sage Central Platform Enhancements Proposal as presented.

8. **Item: Ratification of Opichi LLC Student Lifecycle Management System Phase 2 Proposal**

Background:
Sage Oak Charter Schools requests that the Board ratify the Opichi LLC Student Lifecycle Management System Phase 2 Proposal. This phase expands the current platform by adding a full teacher portal, improved dashboards, geographic placement tools, automated notifications, API connections with School Admin and Finalsite, and year management features. Phase 2 will strengthen existing tools, reduce manual work through automation, and provide continued customization and support during development. This contract supports improved efficiency, more accurate student placement and transfers, and clearer communication across departments. The expense was approved in accordance with Sage Oak Charter Schools' Fiscal Policy.
The expense was approved per Sage Oak Charter Schools' Fiscal Policy.

Recommendation:
It is recommended the Board ratify the Opichi LLC Student Lifecycle Management System Phase 2 Proposal as presented.

9. **Item: Ratification of Opichi LLC Special Education Assessment Management System Proposal**

Background:
Sage Oak Charter Schools requests the Board ratify the Opichi LLC Special Education Assessment Management System (SPED AMS) Proposal. The proposal includes four focused development phases from June 2, 2026, through August 1, 2026, to improve system functionality for the 2026–27 school year. The proposed enhancements include improved data tracking and reporting, automated email notifications and reminders, bulk action tools, overdue indicators, printable assessment summaries, and an AI-powered permissions assistant to make system administration easier. These improvements will increase efficiency, strengthen compliance tracking, improve communication among Special Education staff, and enhance reporting capabilities to better support student services. The expense was approved per Sage Oak Charter Schools' Fiscal Policy.

Recommendation:
It is recommended the Board ratify the Opichi LLC Special Education Assessment Management System Proposal as presented.

10. **Item: Ratification of Opichi LLC IT Help Desk Proposal**

Background:
Sage Oak Charter Schools requests the Board ratify the Opichi LLC proposal for Phase 2 of the IT Help Desk AI-Powered Self-Service Support Portal. This agreement continues the previously approved project and expands the platform to serve as the IT team's primary workspace. Phase 2 includes enhanced chat features with voice input, improved analytics and reporting tools, audit logging, and proactive alerting capabilities. These enhancements will streamline IT operations, reduce reliance on multiple systems, improve data visibility for the leadership team, and strengthen internal support processes. The expense was approved per Sage Oak Charter Schools' Fiscal Policy.

Recommendation:
It is recommended the Board ratify the Opichi LLC IT Help Desk Proposal as presented.

11. **Item: Ratification of Javier Mancera Agreement**

Background:
Sage Oak Charter Schools requests the Board ratify the agreement with Javier Mancera to enhance the SAGE Community Provider (CP) Review Tool, an internal system used by families and staff to find approved vendors for student services. The updates include accessibility improvements, branding updates, enhanced search and filtering features, and user interface improvements to make the tool easier to navigate. The expense was approved per Sage Oak Charter Schools' Fiscal Policy.

Recommendation:
It is recommended the Board ratify the Javier Mancera Agreement as presented.

Coversheet

Consent - Education Services

Section: XI. Consent Agenda
Item: B. Consent - Education Services
Purpose:
Submitted by:
Related Material: BUS Consent - Education Services.pdf

SAGE OAK CHARTER SCHOOLS
Regular Meeting of the Board of Directors - June 11, 2026
BUS Consent Items - Education Services

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

1. **Item:** **Approval of** 2026-27 Sage Oak Charter Schools Title I School-Parent/Guardian Compact
Redline Version

Background:
Sage Oak Charter Schools requests that the Board approve the annual updates to the 2026–2027 Title I School-Parent/Guardian Compact. As required, the compact was reviewed and approved by the Parent Advisory Committee on May 7, 2026. The only update reflected the effective date for the 2026–27 school year; no other changes were made.

Recommendation:
It is recommended the Board approve the Sage Oak Charter Schools Title I School-Parent/Guardian Compact as presented.

2. **Item:** **Ratification of** Riverside Convention Center Revised Contract Addendum

Background:
Sage Oak Charter Schools requests the Board ratify the addendum to the contract with the Riverside Convention Center for meeting and event space and services for the 2026 August Summit. This addendum increased the food and beverage minimum and added meeting space to the original contract. This expense was approved on March 12, 2026, as part of the 2026–27 Strategic Budget Plan.

Recommendation:
It is recommended the Board ratify the Riverside Convention Center Revised Contract Addendum as presented.

3. **Item:** **Ratification of Courtyard by Marriott Event Sales Agreement Contracts**
August 4, 2026
December 14, 2026

Background:
Sage Oak Charter Schools requests the Board ratify the updated Courtyard Marriott contracts for the Special Education Department's annual team meetings on August 4, 2026, and December 14, 2026. This expense was approved on March 12, 2026, as part of the 2026–27 Strategic Budget Plan.

Recommendation:
It is recommended the Board ratify the Courtyard by Marriott Event Sales Agreement Contracts as presented.

4. **Item:** **Ratification of Carter's Balloons LLC Decoration Agreements**
High Desert Region (Apple Valley)
Rancho Region (Rancho Cucamonga)

Background:
Sage Oak Charter Schools requests that the Board ratify the agreements with Carter's Balloons LLC to provide balloon arches for the Personalized Learning Academy end-of-year promotion

celebrations in the High Desert Region (Apple Valley) and the Rancho Region (Rancho Cucamonga). This expense was approved on June 18, 2025, as part of the 2025–26 July Budget.

Recommendation:
It is recommended the Board ratify the Carter's Balloons LLC Decoration Agreements as presented.

5. **Item:** **Ratification of RPh on the Go, LLC d/b/a Spindle Addendum (Isidro Herrera)**

Background:
Sage Oak Charter Schools requests the Board ratify the addendum with RPH On the Go dba Spindle to assign special education teacher Isidro Herrera through an independent contractor arrangement in support of student services. This expense was approved per Sage Oak Charter Schools' Fiscal Policy.

Recommendation:
It is recommended the Board ratify the RPh on the Go, LLC d/b/a Spindle Addendum (Isidro Herrera) as presented.

6. **Item:** **Ratification of RPh on the Go, LLC d/b/a Spindle Addendum (Tina Walker)**

Background:
Sage Oak Charter Schools requests the Board ratify the addendum with RPH On the Go dba Spindle to assign special education teacher Tina Walker through an independent contractor arrangement in support of student services. This expense was approved per Sage Oak Charter Schools' Fiscal Policy.

Recommendation:
It is recommended the Board ratify the RPh on the Go, LLC d/b/a Spindle Addendum (Tina Walker) as presented.

7. **Item:** **Ratification of Springhill Suites Corona Riverside Banquet Event Order**

Background:
Sage Oak Charter Schools requests the Board ratify the banquet event order for SpringHill Suites Corona Riverside for the annual Education Services Department planning meeting on May 8, 2026. This expense was approved on June 18, 2025, as part of the 2025–26 July Budget.

Recommendation:
It is recommended the Board ratify the Springhill Suites Corona Riverside Banquet Event Order as presented.

8. **Item:** **Ratification of Element Ontario Airport Banquet Event Order**

Background:
Sage Oak Charter Schools requests the Board ratify the Element Ontario Airport banquet event order to host a Professional Learning Community (PLC) event for certificated staff in the Rancho Region on May 13, 2026. This expense was approved on June 18, 2025, as part of the 2025–26 July Budget.

Recommendation:
It is recommended the Board ratify the Element Ontario Airport Banquet Event Order as presented.

9. **Item: Ratification of KID FUNdementals Therapy Center Agreement**

Background:
Sage Oak Charter Schools requests that the Board ratify the Independent Educational Evaluation Service Agreement with KID FUNdamentals Therapy Center to complete an occupational therapy Independent Educational Evaluation for a student by June 4, 2026. The expense was approved in accordance with Sage Oak Charter Schools' Fiscal Policy.

Recommendation:
It is recommended the Board ratify the as presented.

10. **Item: Ratification of Renaissance Quote #358047v2**

Background:
Sage Oak Charter Schools requests the Board ratify the Renaissance quote for the 2026–27 school year. This annual subscription renewal enables teachers to administer STAR Math and Reading assessments to monitor student progress. This expense was approved on March 12, 2026, as part of the 2026–27 Strategic Budget Plan.

Recommendation:
It is recommended the Board ratify the Renaissance Quote #358047v2 as presented.

11. **Item: Ratification of Mission San Juan Capistrano Tours/Protocols Waiver**

Background:
Sage Oak Charter Schools requests the Board ratify the San Juan Capistrano Mission waiver, which will allow students to participate in a field trip to the mission. There is no fiscal impact.

Recommendation:
It is recommended the Board ratify the Mission San Juan Capistrano Tours/Protocols Waiver as presented.

12. **Item: Ratification of Segerstrom Center for the Arts Group Sales Order Agreement**

Background:
Sage Oak Charter Schools requests that the Board ratify the group sales order agreement with Segerstrom Center for the Performing Arts for Beauty and the Beast field trip tickets on October 6, 2026.

Recommendation:
It is recommended the Board ratify the Segerstrom Center for the Arts Group Sales Order Agreement as presented.

Coversheet

Consent - Human Resources

Section: XI. Consent Agenda
Item: C. Consent - Human Resources
Purpose:
Submitted by:
Related Material: BUS Consent - Human Resources.pdf

SAGE OAK CHARTER SCHOOLS
Regular Meeting of the Board of Directors - June 11, 2026
BUS Consent Items - Human Resources

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

1. **Item: Approval of Certificated Personnel Report**

2. **Item: Approval of Classified Personnel Report**

3. **Item: Approval of Job Descriptions**

   Background:
   Job descriptions are critical to the successful personnel operations of the school. They provide structure in areas such as recruitment, onboarding, determining reasonable accommodations, performance evaluation, succession planning, staff development, and compensation analysis. Job descriptions are routinely revised to remove antiquated wording, reflect the current duties of the positions, and align the minimum qualifications, knowledge, and abilities to the duties. New job descriptions are developed based on the school's staffing plans and identified support needs.

   New:
   Events Specialist
   Manager III, Lead Events
   Executive Assistant I
   Executive Assistant II

   Recommendation:
   It is recommended the Board approve the job description(s) and revisions as presented.

Coversheet

Consent - Operations & Accountability

Section: XI. Consent Agenda
Item: D. Consent - Operations & Accountability
Purpose:
Submitted by:
Related Material: BUS Consent - Operations & Accountability.pdf

SAGE OAK CHARTER SCHOOLS
Regular Meeting of the Board of Directors - June 11, 2026
BUS Consent Items - Operations & Accountability

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

1. **Item: Ratification of Springhill Suites by Marriott Temecula Valley Letter of Agreement**

   Background:
   Sage Oak Charter Schools requests Board ratification of the Letter of Agreement with SpringHill Suites by Marriott Temecula Valley to provide meeting space for the Operations and Accountability in-person leadership meeting on June 8–9, 2026. This expense was approved on June 18, 2025, as part of the 2025–26 July Budget.

   Recommendation:
   It is recommended the Board ratify the Springhill Suites by Marriott Temecula Valley Letter of Agreement as presented.

2. **Item: Ratification of Dos Lagos Golf Course Agreement**

   Background:
   Sage Oak Charter Schools requests the Board ratify the agreement with Dos Lagos Golf Course for a meeting room rental to host a Director team on May 27, 2026. This expense was approved on June 18, 2025, as part of the 2025–26 July Budget.

   Recommendation:
   It is recommended the Board ratify the Dos Lagos Golf Course Agreement as presented.

Coversheet

Consent - Policy Development

Section: XI. Consent Agenda
Item: E. Consent - Policy Development
Purpose:
Submitted by:
Related Material: BUS Consent - Policy Development.pdf

SAGE OAK CHARTER SCHOOLS
Regular Meeting of the Board of Directors - June 11, 2026
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/Rescinded

Background:

3000 Series- Business/Non-Instructional
3010-SO Fiscal Control Policy and Procedures
Redline Version
Sage Oak Charter Schools requests the Board approve the revisions to the Fiscal Control Policy and Procedures, which add a multi-year budget plan for the two subsequent fiscal years, revise purchasing and contract approval language for expenditures over and under $50,000, update the annual bid threshold from $114,800 to $119,100, revise audit reporting references to the School's chartering authorities, update job titles, remove language regarding withholding report cards or transcripts for unpaid debts to align with Education Code requirements, and remove the Public Records Act provision from the Retention of Records section because that topic will be addressed in a separate Public Records Act policy.

3015-SO Investment Policy
Redline Version
Sage Oak Charter Schools requests the Board approve the revisions to the Investment Policy, which expand authorized account options to permit investment in United States Treasury Bills with maturities of 52 weeks or less, while maintaining the policy's existing emphasis on safety, liquidity, and prudent financial management.

3100-SO Community Provider Code of Conduct Policy
Redline Version
Sage Oak Charter Schools requests the Board approve the revisions to the Community Provider Code of Conduct Policy, which add language requiring Community Providers to comply with SB 848, including training all administrators, employees, agents, independent contractors, and subcontractors performing services for the Charter School in their duties as mandated reporters and requiring them to act accordingly when reporting obligations arise. No other substantive changes appear in the policy.

3130-SO Document Retention Policy
Redline Version
Sage Oak Charter Schools requests the Board approve the revisions to the Document Retention Policy, which update email retention procedures by directing staff to label individual emails as "retain" in Google Mail's labeling functionality, clarify that staff shall not delete emails that are useful for administrative, personnel, or fiscal purposes or that may be subject to litigation or a discovery order, and remove the section addressing AI-generated content because that information will be covered in Acceptable Use Policy #5045 and Artificial Intelligence Policy #3160. No other substantive changes appear in the policy.

4000 Series- Personnel Services
4015-SO Equal Employment Opportunity Policy
Redline Version
Sage Oak Charter Schools requests the Board approve the revisions to the Equal Employment Opportunity Policy that add "any combination of the above protected characteristics" to the list of protected categories covered under the policy. No other substantive changes appear in the policy.

4020-SO Background Check Policy
Redline Version
Sage Oak Charter Schools requests the Board approve the revisions to the Background Check Policy, which add a requirement that applicants for certificated and classified positions disclose each Local Education Agency where they were previously employed and authorize the Charter School to contact those agencies regarding any credible allegations, investigations, or findings of egregious misconduct, as permitted by law. No other substantive changes appear in the policy.

4035-SO Mandated Reporter - Child Abuse and Neglect Reporting Policy
Redline Version
Sage Oak Charter Schools requests the Board approve the revisions to the Mandated Reporter - Child Abuse and Neglect Reporting Policy, which expand the policy's coverage and training requirements to include volunteers, governing board members, and contractors whose duties require contact with or supervision of students, and clarify that newly elected governing board members and onboarded volunteers and contractors must complete mandated reporter training within the first six weeks of their appointment or onboarding. These changes were made to ensure compliance with new mandated reporting laws under SB 848.

4045-SO Professional Boundaries Policy
Redline Version
Sage Oak Charter Schools requests the Board approve the revisions to the Professional Boundaries Policy, which add language clarifying that communication with students must be strictly for educational purposes and occur only on approved platforms with administrative oversight and record retention, and that text messaging may be used only when a parent or guardian is included in the message. No other substantive changes appear in the policy.

4060-SO Prohibiting Unlawful Harassment, Discrimination, and Retaliation Policy
Redline Version
Sage Oak Charter Schools requests the Board approve the revisions to the Unlawful Harassment, Discrimination, and Retaliation Policy, which add "any combination of the above protected characteristics" to the list of protected categories covered under the policy and revise prohibited conduct language from "deferential" treatment to "differential" treatment based on protected characteristics. No other substantive changes appear in the policy.

4070-SO Lactation Accommodation Policy
Redline Version
Sage Oak Charter Schools requests the Board approve revisions to the Lactation Accommodation Policy that add electricity to the list of resources the School will provide for on-site employees using lactation accommodations and include grammatical changes. No other substantive changes appear in the policy.

4145- SO Professional Development Reimbursement Policy
Redline Version
Sage Oak Charter Schools requests the Board approve the revisions to the Professional Development Reimbursement Policy, which clarify that reimbursement does not apply to certifications required for initial hire, revise the eligible expense language to specify that reimbursement may apply to conference registration, books, exam fees, and tuition while excluding books, supplies, parking, and travel from reimbursement, and allow limited exceptions for minimum education requirements when preapproved by Human Resources. The revisions also add a cap of $10,000 per certification or credential and no more than $5,250 per calendar year, clarify application withdrawal procedures if an approved program is not completed, and remove the Repayment section.

4145E-SO Professional Development Reimbursement Policy Exhibit- **Rescind**
Sage Oak Charter Schools requests the Board rescind the Professional Development Reimbursement Policy Exhibit, which currently contains a specific list of approved professional development opportunities. Rescinding the exhibit will remove the fixed list of preapproved opportunities and allow professional development reimbursement requests to be considered and approved based on the School's current needs and priorities rather than prior-standing approvals.

5000 Series- Student Services
5010-SO Educational Records and Student Information Policy
Redline Version
Sage Oak Charter Schools requests the Board approve revisions to the Educational Records and Student Information Policy that strengthen provisions related to the use of artificial intelligence tools by adding student data privacy review requirements, clarifying compliance with applicable privacy laws, and establishing notice and consent expectations for AI-assisted recording and notetaking tools.

5110-SO Cell Phones, Smartphones, Pagers & Other Electronic Signaling Devices Policy
Redline Version
Sage Oak Charter Schools requests the Board approve the revisions to the Cell Phones, Smartphones, Pagers, and Other Electronic Signaling Devices Policy, which provide conforming revisions to align the policy with AB 962, clarify that the policy was developed with stakeholder input in accordance with state law, add a periodic review requirement for ongoing legal compliance, and reflect no change in practice.

6000 Series- Instruction
6010-SO Independent Study Policy
Redline Version
Sage Oak Charter Schools requests the Board review and approve the Independent Study Policy as part of its annual review cycle, noting the addition of an indicator under the satisfactory educational progress criteria for failure to attend a scheduled appointment, meeting, or service with a teacher or service provider. No other substantive changes appear in the policy.

6015-SO Comprehensive Sexual Health Education Policy
Redline Version
Sage Oak Charter Schools requests the Board approve the revisions to the Comprehensive Sexual Health Education Policy, which add instruction on affirmative consent, defined as affirmative, conscious, and voluntary agreement to engage in sexual activity, including strategies for recognizing and establishing healthy boundaries and respecting others. This revision ensures compliance with the California Healthy Youth Act (Education Code §51934), which requires instruction on affirmative consent as part of sexual health education. The revisions also add language in the Annual Notice section stating that parents/guardians shall be notified of their right to inspect all instructional materials prior to the start of instruction.

6035-SO Mathematics Placement Policy
Redline Version
Sage Oak Charter Schools requests the Board approve the revisions to the Mathematics Placement Policy, which revise the appeal and reassessment language to clarify that if a student does not qualify based on the listed criteria, the student may be reassessed or provide additional evidence of readiness, and that a parent/guardian may appeal a placement decision for Charter School review and timely communication of a final decision. No other substantive changes appear in the policy.

6040-SO Assessment Policy
Redline Version

Sage Oak Charter Schools requests the Board approve the revisions to the Assessment Policy, which update terminology throughout the policy by replacing references to students with "moderate to severe intellectual disabilities" with students with "extensive support needs," and revise the Diagnostic Local Assessment section to expand the assessment grade span from grades 1–11 to grades K–11 for Math and English Language Arts. No other substantive changes appear in the policy.

6060-SO Special Education Assessment Request Policy
Redline Version
Sage Oak Charter Schools requests the Board approve the revisions to the Special Education Assessment Request Policy, which add broader language regarding the School's responsibility to identify and evaluate students with disabilities, implement designated SELPA procedures for referral, assessment, planning, implementation, review, and triennial assessment, and provide written notice to parents/guardians of their rights related to the special education process. The revisions also clarify procedures for verbal and written parent requests, specify that an IEP shall be held within 60 days of receipt of a consented assessment plan subject to applicable exclusions and extensions, clarify that the SST process will not delay an assessment unless the parent/guardian agrees in writing, and update the assessment plan timeline to run from the initial written request unless the request is rescinded in writing.

6070-SO Independent Educational Evaluation Policy
Redline Version
Sage Oak Charter Schools requests the Board approve the revisions to the Independent Educational Evaluation Policy, which provide greater clarity, consistency, and alignment with current legal requirements and SELPA guidance by clarifying procedures for responding to parent requests for IEEs, defining staff timelines and responsibilities, and expanding guidance on options for selecting evaluators. The revisions also strengthen criteria related to evaluator qualifications, geographic considerations, and cost parameters, and clarify communication with families, documentation requirements, and the use of insurance.

6075-SO Special Education Certificate of Completion Policy
Redline Version
Sage Oak Charter Schools requests the Board approve the revisions to the Special Education Certificate of Completion Policy, which primarily make clarifying and grammatical updates, including revising the language regarding students who receive a Certificate of Completion to clarify that they may opt to exit high school or remain enrolled. No other substantive changes appear in the policy.

6115-SO Attendance, Support, and Involuntary Disenrollment Policy
Redline Version
Sage Oak Charter Schools requests the Board approve the revisions to the Attendance, Support, and Involuntary Disenrollment Policy, which revise references to special education sessions to "missed scheduled appointments or sessions," define satisfactory educational progress to align with the Independent Study Policy, and make clarifying grammatical and cleanup edits throughout the policy.

6125-SO Report Card Policy
Redline Version
Sage Oak Charter Schools requests the Board approve the revisions to the Report Card Policy, which updates report card requirements to clarify that report cards are standard for students in grades TK-8 with a minimum of 20 days of positive attendance and are required for all students in grades 9-12 with any positive attendance days. The revisions also replace the "Students with Moderate/Severe Disabilities" section with "Extensive Support Needs Program," clarify that students in grades TK-8 will receive a GO mark and students in grades 9-12 will receive CR/NC, note that progress will be reported as identified in the studestudent'sning plan, and add that students in grades TK-12 will be assessed on Student Learning Outcomes using OE, AE, and NE.

6210-SO Graduation Policy
Redline Version
Sage Oak Charter Schools requests the Board approve the revisions to the Graduation Policy, which remove the paragraph regarding the AB 101 ethnic studies graduation requirement. In consultation with legal counsel, this revision reflects that the latest state budget does not include funding for ethnic studies and, as a result, local educational agencies, including charter schools, are not required to enforce this requirement at this time. Sage Oak will continue to offer ethnic studies, but it will no longer be a graduation requirement.

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

Coversheet

(Action) Approval of Proposition 28 Arts and Music in Schools Funding, 2025-26 Annual Reports & Certifications for Sage Oak Charter Schools

Section: XII. Business Services
Item: A. (Action) Approval of Proposition 28 Arts and Music in Schools Funding, 2025-26 Annual Reports & Certifications for Sage Oak Charter Schools
Purpose: Vote
Submitted by:
Related Material:
Proposition 28 Arts & Music in Schools Funding, 2025-26 Annual Report_Sage Oak Charter Schools - South (#2051).pdf
Proposition 28 Arts & Music in Schools Funding, 2025-26 Annual Report_Sage Oak Charter School #1885.pdf
Proposition 28 Arts & Music in Schools Funding, 2025-26 Annual Report_Sage Oak Charter School - Keppel (#1886).pdf
Proposition 28 Arts & Music in Schools Funding 2025-26 Annual Certification_Sage Oak Charter School (#1885).pdf
Proposition 28 Arts & Music in Schools Funding 2025-26 Annual Certification_Sage Oak Charter School - Keppel (#1886).pdf
Proposition 28 Arts & Music in Schools Funding 2025-26 Annual Certification_Sage Oak Charter School South (#2051).pdf

BACKGROUND:

Local Education Agencies (LEAs) are mandated to report on several factors related to the use of Proposition 28 funding. The mandated information for these reports includes the number of full-time equivalent teachers, classified personnel, teaching aides, the number of pupils served, and the number of school sites providing arts education programs. These reports must be approved by the governing board and submitted to the Arts and Music in Schools website portal.

RECOMMENDATION:

It is recommended the Board approve the Proposition 28 Arts and Music in Schools Funding, 2025-26 Annual Reports and Certifications as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).

Proposition 28: Arts and Music in Schools Funding Annual Report

Fiscal Year 2025-26

Name: Sage Oak Charter - South
CDS Code: 3775416-0139378
Charter School Number: 2051
Allocation Year: 2025-26, 2024-25, 2023-24

1. Narrative description of the Prop 28 arts education program(s) funded. (2500 character limit).

The Prop 28 Arts Education Program enriches education by providing comprehensive arts access. We have hired credentialed teachers for both virtual and in-person instruction in fine arts, painting, sculpting, creative arts, drawing, coding, and computer science. This diverse curriculum fosters creativity, critical thinking, and technical skills. Our fine arts courses, including painting and sculpting, encourage students to explore various mediums and techniques. Drawing classes build fundamental skills, enhancing observational and interpretative abilities. The integration of coding and computer science introduces students to essential digital skills, blending creativity with technical expertise. Prop 28 emphasizes personalized learning, offering flexibility through virtual classes and immersive experiences through in-person instruction. This dual approach caters to different learning styles, ensuring all students can thrive. By investing in skilled teachers and a varied curriculum, the Prop 28 Arts Education Program inspires creative thinkers and innovators. We aim to create an inclusive, dynamic environment where students discover and develop their artistic talents. This program not only enhances artistic abilities but also contributes to overall academic and personal growth, making a lasting impact on students and the community.

2. Number of full-time equivalent teachers (certificated).	0.4
3. Number of full-time equivalent personnel (classified).	0.1
4. Number of full-time equivalent teaching aides.	0.0
5. Number of students served.	0
6. Number of school sites providing arts education.	3
Date of Approval by Governing Board/Body	6/11/2026 12:00:00 AM

Annual Report Data URL

https://www.sageoak.education/compliance/

Submission Date 5/13/2026 12:09:49 PM

Proposition 28: Arts and Music in Schools Funding Annual Report

Fiscal Year 2025-26

Name: Sage Oak Charter
CDS Code: 3667736-0136069
Charter School Number: 1885
Allocation Year: 2025-26, 2024-25, 2023-24

1. Narrative description of the Prop 28 arts education program(s) funded. (2500 character limit).

The Prop 28 Arts Education Program enriches education by providing comprehensive arts access. We have hired credentialed teachers for both virtual and in-person instruction in fine arts, painting, sculpting, creative arts, drawing, coding, and computer science. This diverse curriculum fosters creativity, critical thinking, and technical skills. Our fine arts courses, including painting and sculpting, encourage students to explore various mediums and techniques. Drawing classes build fundamental skills, enhancing observational and interpretative abilities. The integration of coding and computer science introduces students to essential digital skills, blending creativity with technical expertise. Prop 28 emphasizes personalized learning, offering flexibility through virtual classes and immersive experiences through in-person instruction. This dual approach caters to different learning styles, ensuring all students can thrive. By investing in skilled teachers and a varied curriculum, the Prop 28 Arts Education Program inspires creative thinkers and innovators. We aim to create an inclusive, dynamic environment where students discover and develop their artistic talents. This program not only enhances artistic abilities but also contributes to overall academic and personal growth, making a lasting impact on students and the community.

2. Number of full-time equivalent teachers (certificated).	2.2
3. Number of full-time equivalent personnel (classified).	0.8
4. Number of full-time equivalent teaching aides.	0.0
5. Number of students served.	0
6. Number of school sites providing arts education.	3
Date of Approval by Governing Board/Body	6/11/2026 12:00:00 AM

Annual Report Data URL

https://www.sageoak.education/compliance/

Submission Date 5/13/2026 12:11:43 PM

Proposition 28: Arts and Music in Schools Funding Annual Report

Fiscal Year 2025-26

Name: Sage Oak Charter School- Keppel
CDS Code: 1964642-0136127
Charter School Number: 1886
Allocation Year: 2025-26, 2024-25, 2023-24

1. Narrative description of the Prop 28 arts education program(s) funded. (2500 character limit).

The Prop 28 Arts Education Program enriches education by providing comprehensive arts access. We have hired credentialed teachers for both virtual and in-person instruction in fine arts, painting, sculpting, creative arts, drawing, coding, and computer science. This diverse curriculum fosters creativity, critical thinking, and technical skills. Our fine arts courses, including painting and sculpting, encourage students to explore various mediums and techniques. Drawing classes build fundamental skills, enhancing observational and interpretative abilities. The integration of coding and computer science introduces students to essential digital skills, blending creativity with technical expertise. Prop 28 emphasizes personalized learning, offering flexibility through virtual classes and immersive experiences through in-person instruction. This dual approach caters to different learning styles, ensuring all students can thrive. By investing in skilled teachers and a varied curriculum, the Prop 28 Arts Education Program inspires creative thinkers and innovators. We aim to create an inclusive, dynamic environment where students discover and develop their artistic talents. This program not only enhances artistic abilities but also contributes to overall academic and personal growth, making a lasting impact on students and the community.

2. Number of full-time equivalent teachers (certificated).	0.3
3. Number of full-time equivalent personnel (classified).	0.1
4. Number of full-time equivalent teaching aides.	0.0
5. Number of students served.	0
6. Number of school sites providing arts education.	3
Date of Approval by Governing Board/Body	6/11/2026 12:00:00 AM

Annual Report Data URL

https://www.sageoak.education/compliance/

Submission Date 5/13/2026 12:10:46 PM

Proposition 28: Arts and Music in Schools Funding Annual Certification Requirements

Name: Sage Oak Charter
CDS Code: 3667736-0136069
Charter School Number: 1885
Allocation Year: 2025-26

As a condition of receipt of funds pursuant to Chapter 5.1 of Part 6 of Division 1 of Title 1 of the Education Code (EC) (Section 8820 et seq.), subdivision (g) of EC Section 8820 requires a local educational agency to annually certify to the following:

(1) Certify that all Arts and Music in Schools funds received in the current fiscal year will be used to provide arts education programs, and that Arts and Music in Schools funds expended in the prior fiscal year were, in fact, used for those purposes, except as provided in paragraph (3). For local educational agencies with an enrollment of 500 or more pupils, the certification shall also ensure that at least 80 percent of funds to be expended will be used to employ certificated or classified employees to provide arts education program instruction and that the remaining funds will be used for training, supplies and materials, and arts educational partnership programs unless waived pursuant to subdivision (h) of EC Section 8820.

(2) Certify that such funds received in the current fiscal year will be used to supplement funding for arts education programs and that funds expended in the prior fiscal year were, in fact, used to supplement arts education programs.

(3) Certify that no more than 1 percent of funds received in the current fiscal year will be used for a local educational agency's administrative expenses to implement this chapter and that funds received in the prior fiscal year were, in fact, used within that limit.

☑ **By checking this box, the submitting local educational agency certifies to meeting the requirements of EC Section 8820(g)(1) through (3), as outlined above.**

Submission Date 12/9/2025 10:33:19 AM

Proposition 28: Arts and Music in Schools Funding Annual Certification Requirements

Name: Sage Oak Charter School- Keppel
CDS Code: 1964642-0136127
Charter School Number: 1886
Allocation Year: 2025-26

As a condition of receipt of funds pursuant to Chapter 5.1 of Part 6 of Division 1 of Title 1 of the Education Code (EC) (Section 8820 et seq.), subdivision (g) of EC Section 8820 requires a local educational agency to annually certify to the following:

(1) Certify that all Arts and Music in Schools funds received in the current fiscal year will be used to provide arts education programs, and that Arts and Music in Schools funds expended in the prior fiscal year were, in fact, used for those purposes, except as provided in paragraph (3). For local educational agencies with an enrollment of 500 or more pupils, the certification shall also ensure that at least 80 percent of funds to be expended will be used to employ certificated or classified employees to provide arts education program instruction and that the remaining funds will be used for training, supplies and materials, and arts educational partnership programs unless waived pursuant to subdivision (h) of EC Section 8820.

(2) Certify that such funds received in the current fiscal year will be used to supplement funding for arts education programs and that funds expended in the prior fiscal year were, in fact, used to supplement arts education programs.

(3) Certify that no more than 1 percent of funds received in the current fiscal year will be used for a local educational agency's administrative expenses to implement this chapter and that funds received in the prior fiscal year were, in fact, used within that limit.

☑ **By checking this box, the submitting local educational agency certifies to meeting the requirements of EC Section 8820(g)(1) through (3), as outlined above.**

Submission Date 12/9/2025 10:35:48 AM

Proposition 28: Arts and Music in Schools Funding Annual Certification Requirements

Name: Sage Oak Charter - South
CDS Code: 3775416-0139378
Charter School Number: 2051
Allocation Year: 2025-26

As a condition of receipt of funds pursuant to Chapter 5.1 of Part 6 of Division 1 of Title 1 of the Education Code (EC) (Section 8820 et seq.), subdivision (g) of EC Section 8820 requires a local educational agency to annually certify to the following:

(1) Certify that all Arts and Music in Schools funds received in the current fiscal year will be used to provide arts education programs, and that Arts and Music in Schools funds expended in the prior fiscal year were, in fact, used for those purposes, except as provided in paragraph (3). For local educational agencies with an enrollment of 500 or more pupils, the certification shall also ensure that at least 80 percent of funds to be expended will be used to employ certificated or classified employees to provide arts education program instruction and that the remaining funds will be used for training, supplies and materials, and arts educational partnership programs unless waived pursuant to subdivision (h) of EC Section 8820.

(2) Certify that such funds received in the current fiscal year will be used to supplement funding for arts education programs and that funds expended in the prior fiscal year were, in fact, used to supplement arts education programs.

(3) Certify that no more than 1 percent of funds received in the current fiscal year will be used for a local educational agency's administrative expenses to implement this chapter and that funds received in the prior fiscal year were, in fact, used within that limit.

☑ **By checking this box, the submitting local educational agency certifies to meeting the requirements of EC Section 8820(g)(1) through (3), as outlined above.**

Submission Date 12/9/2025 10:37:00 AM

Coversheet

(Action) Approval of 2026–27 Consolidated Application and Reporting System (CARS)

Section: XII. Business Services
Item: B. (Action) Approval of 2026–27 Consolidated Application and Reporting System (CARS)
Purpose: Vote
Submitted by:
Related Material:
CARS 2026-27 Application & Certifications_Sage Oak Charter School (#1885).pdf
CARS 2026-27 Application & Certifications_Sage Oak Charter School - Keppel (#1886).pdf
CARS 2026-27 Application & Certifications_Sage Oak Charter School - South (#2051).pdf

BACKGROUND:

Sage Oak Charter Schools requests the Board approve the 2026-27 Data Collections for submission to the Consolidated Application and Reporting System. The data collection includes Certification of Assurances, Protected Prayer Certification, LCAP Federal Addendum Certification, Application for Funding, and Substitute System for Time Accounting.

RECOMMENDATION:

It is recommended the Board approve the 2026-27 data collections for submission to the Consolidated Application and Reporting System (CARS) as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).

California Department of Education **Consolidated Application**

Sage Oak Charter (36 67736 0136069)

Status: Certified
Saved by: Habib Tahmas
Date: 5/22/2026 12:46 PM

2026–27 Certification of Assurances

Submission of Certification of Assurances is required every fiscal year. A complete list of legal and program assurances for the fiscal year can be found at https://www.cde.ca.gov/fg/aa/co/ca26assurancestoc.asp.

CDE Program Contact:

Consolidated Application Support Desk, Education Data Office, ConAppSupport@cde.ca.gov, 916-319-0297

Consolidated Application Certification Statement

I hereby certify that all of the applicable state and federal rules and regulations will be observed by this applicant; that to the best of my knowledge the information contained in this application is correct and complete; and I agree to participate in the monitoring process regarding the use of these funds according to the standards and criteria set forth by the California Department of Education Federal Program Monitoring (FPM) Office. Legal assurances for all programs are accepted as the basic legal condition for the operation of selected projects and programs and copies of assurances are retained on site. I certify that we accept all assurances except for those for which a waiver has been obtained or requested. A copy of all waivers or requests is on file. I certify that actual ink signatures for this form are on file.

Authorized Representative's Full Name	Habib Tahmas
Authorized Representative's Signature	
Authorized Representative's Title	Sr. Director of Fiscal Services
Authorized Representative's Signature Date	05/22/2026

Warning
The data in this report may be protected by the Family Educational Rights and Privacy Act (FERPA) and other applicable data privacy laws. Unauthorized access or sharing of this data may constitute a violation of both state and federal law.

California Department of Education **Consolidated Application**

Sage Oak Charter (36 67736 0136069)

Status: Certified
Saved by: Habib Tahmas
Date: 5/22/2026 12:47 PM

2026–27 Protected Prayer Certification

Every Student Succeeds Act (ESSA) Section 8524 specifies federal requirements regarding constitutionally protected prayer in public elementary and secondary schools. This form meets the annual requirement and provides written certification.

CDE Program Contact:

Carrie Lopes, Title I Policy, Program, and Support Office, CLopes@cde.ca.gov, 916-319-0126

Protected Prayer Certification Statement

The local educational agency (LEA) hereby assures and certifies to the California State Board of Education that the LEA has no policy that prevents, or otherwise denies participation in, constitutionally protected prayer in public schools as set forth in the "Guidance on Constitutionally Protected Prayer in Public Elementary and Secondary Schools."

The LEA hereby assures that this page has been printed and contains an ink signature. The ink signature copy shall be made available to the California Department of Education upon request or as part of an audit, a compliance review, or a complaint investigation.

The authorized representative agrees to the above statement	Yes
Authorized Representative's Full Name	Habib Tahmas
Authorized Representative's Title	Sr. Director Fiscal Services
Authorized Representative's Signature Date	05/22/2026
Comment If the LEA is not able to certify at this time, then an explanation must be provided in the comment field. (Maximum 500 characters)	

Warning
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2026–27 LCAP Federal Addendum Certification

CDE Program Contact:
Local Agency Systems Support Office, LCAPAddendum@cde.ca.gov, 916-323-5233

Initial Application

To receive initial funding under the Every Student Succeeds Act (ESSA), a local educational agency (LEA) must have a plan approved by the State Educational Agency on file with the State. Within California, LEAs that apply for ESSA funds for the first time are required to complete the Local Control and Accountability Plan (LCAP), the LCAP Federal Addendum Template (Addendum), and the Consolidated Application (ConApp). The LCAP, in conjunction with the Addendum and the ConApp, serve to meet the requirements of the ESSA LEA Plan.

In order to initially apply for funds, the LEA must certify that the current LCAP has been approved by the local governing board or governing body of the LEA. As part of this certification, the LEA agrees to submit the LCAP Federal Addendum, that has been approved by the local governing board or governing body of the LEA, to the California Department of Education (CDE) and acknowledges that the LEA agrees to work with the CDE to ensure that the Addendum addresses all required provisions of the ESSA programs for which they are applying for federal education funds.

Returning Application

If the LEA certified a prior year LCAP Federal Addendum Certification data collection form in the Consolidated Application and Reporting System, then the LEA may use in this form the same original approval or adoption date used in the prior year form.

County Office of Education (COE) or District For a COE, enter the original approval date as the day the CDE approved the current LCAP. For a district, enter the original approval date as the day the COE approved the current LCAP	
Direct Funded Charter Enter the adoption date of the current LCAP	06/18/2026
Authorized Representative's Full Name	Habib Tahmas
Authorized Representative's Title	Sr. Director, Fiscal Services

Warning
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California Department of Education **Consolidated Application**

Sage Oak Charter (36 67736 0136069)

Status: Draft
Saved by: Jamie Houseworth
Date: 5/21/2026 10:11 AM

2026–27 Application for Funding

CDE Program Contact:
Consolidated Application Support Desk, Education Data Office, ConAppSupport@cde.ca.gov, 916-319-0297

Local Governing Board Approval

The local educational agency (LEA) is required to review and receive approval of their Application for Funding selections with their local governing board.

By checking this box the LEA certifies that the Local Board has approved the Application for Funding for the listed fiscal year	Yes

District English Learner Advisory Committee Review

Per Title 5 of the California Code of Regulations Section 11308, if your LEA has more than 50 English learners, then the LEA must establish a District English Learner Advisory Committee (DELAC) which shall review and advise on the development of the application for funding programs that serve English learners.

By checking this box the LEA certifies that parent input has been received from the District English Learner Committee (if applicable) regarding the spending of Title III funds for the listed fiscal year	Yes

Application for Categorical Programs

To receive specific categorical funds for a school year, the LEA must apply for the funds by selecting Yes below. Only the categorical funds that the LEA is eligible to receive are displayed.

Title I, Part A (Basic Grant) ESSA Sec. 1111 et seq. SACS 3010	Yes
Title II, Part A (Supporting Effective Instruction) ESEA Sec. 2104 SACS 4035	Yes
Title III English Learner ESEA Sec. 3102 SACS 4203	No
Title III Immigrant ESEA Sec. 3102 SACS 4201	No
Title IV, Part A (Student and School Support) ESSA Sec. 4101 SACS 4127	Yes

Warning
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California Department of Education **Consolidated Application**

Sage Oak Charter (36 67736 0136069)

Status: Certified
Saved by: Habib Tahmas
Date: 5/22/2026 12:48 PM

2026–27 Substitute System for Time Accounting

This certification may be used by auditors and by California Department of Education (CDE) oversight personnel when conducting audits and sub-recipient monitoring of the substitute time-and-effort system. Approval is automatically granted when the local educational agency (LEA) submits and certifies this data collection.

CDE Program Contact:

Hilary Thomson, Fiscal Oversight and Support Office, HThomson@cde.ca.gov, 916-323-0765

The LEA certifies that only eligible employees will participate in the substitute system and that the system used to document employee work schedules includes sufficient controls to ensure that the schedules are accurate.

Detailed information on documenting salaries and wages, including both substitute systems of time accounting, are described in Procedure 905 of the California School Accounting Manual posted on the CDE web site at https://www.cde.ca.gov/fg/ac/sa/.

2026–27 Request for authorization	Yes
LEA certifies that the following is a full disclosure of any known deficiencies with the substitute system or known challenges with implementing the system (Maximum 500 characters)	There are no known deficiencies or known challenges with implementing a substitute system.

Warning
The data in this report may be protected by the Family Educational Rights and Privacy Act (FERPA) and other applicable data privacy laws. Unauthorized access or sharing of this data may constitute a violation of both state and federal law.

California Department of Education **Consolidated Application**

Sage Oak Charter School- Keppel (19 64642 0136127)

Status: Certified
Saved by: Habib Tahmas
Date: 5/22/2026 12:50 PM

2026–27 Certification of Assurances

Submission of Certification of Assurances is required every fiscal year. A complete list of legal and program assurances for the fiscal year can be found at https://www.cde.ca.gov/fg/aa/co/ca26assurancestoc.asp.

CDE Program Contact:

Consolidated Application Support Desk, Education Data Office, ConAppSupport@cde.ca.gov, 916-319-0297

Consolidated Application Certification Statement

I hereby certify that all of the applicable state and federal rules and regulations will be observed by this applicant; that to the best of my knowledge the information contained in this application is correct and complete; and I agree to participate in the monitoring process regarding the use of these funds according to the standards and criteria set forth by the California Department of Education Federal Program Monitoring (FPM) Office. Legal assurances for all programs are accepted as the basic legal condition for the operation of selected projects and programs and copies of assurances are retained on site. I certify that we accept all assurances except for those for which a waiver has been obtained or requested. A copy of all waivers or requests is on file. I certify that actual ink signatures for this form are on file.

Authorized Representative's Full Name	Habib Tahmas
Authorized Representative's Signature	
Authorized Representative's Title	Sr. Director of Fiscal Services
Authorized Representative's Signature Date	05/22/2026

Warning
The data in this report may be protected by the Family Educational Rights and Privacy Act (FERPA) and other applicable data privacy laws. Unauthorized access or sharing of this data may constitute a violation of both state and federal law.

2026–27 Protected Prayer Certification

Every Student Succeeds Act (ESSA) Section 8524 specifies federal requirements regarding constitutionally protected prayer in public elementary and secondary schools. This form meets the annual requirement and provides written certification.

CDE Program Contact:

Carrie Lopes, Title I Policy, Program, and Support Office, CLopes@cde.ca.gov, 916-319-0126

Protected Prayer Certification Statement

The local educational agency (LEA) hereby assures and certifies to the California State Board of Education that the LEA has no policy that prevents, or otherwise denies participation in, constitutionally protected prayer in public schools as set forth in the "Guidance on Constitutionally Protected Prayer in Public Elementary and Secondary Schools."

The LEA hereby assures that this page has been printed and contains an ink signature. The ink signature copy shall be made available to the California Department of Education upon request or as part of an audit, a compliance review, or a complaint investigation.

The authorized representative agrees to the above statement	Yes
Authorized Representative's Full Name	Habib Tahmas
Authorized Representative's Title	Sr. Director Fiscal Services
Authorized Representative's Signature Date	05/22/2026
Comment If the LEA is not able to certify at this time, then an explanation must be provided in the comment field. (Maximum 500 characters)	

Warning
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2026–27 LCAP Federal Addendum Certification

CDE Program Contact:

Local Agency Systems Support Office, LCAPAddendum@cde.ca.gov, 916-323-5233

Initial Application

To receive initial funding under the Every Student Succeeds Act (ESSA), a local educational agency (LEA) must have a plan approved by the State Educational Agency on file with the State. Within California, LEAs that apply for ESSA funds for the first time are required to complete the Local Control and Accountability Plan (LCAP), the LCAP Federal Addendum Template (Addendum), and the Consolidated Application (ConApp). The LCAP, in conjunction with the Addendum and the ConApp, serve to meet the requirements of the ESSA LEA Plan.

In order to initially apply for funds, the LEA must certify that the current LCAP has been approved by the local governing board or governing body of the LEA. As part of this certification, the LEA agrees to submit the LCAP Federal Addendum, that has been approved by the local governing board or governing body of the LEA, to the California Department of Education (CDE) and acknowledges that the LEA agrees to work with the CDE to ensure that the Addendum addresses all required provisions of the ESSA programs for which they are applying for federal education funds.

Returning Application

If the LEA certified a prior year LCAP Federal Addendum Certification data collection form in the Consolidated Application and Reporting System, then the LEA may use in this form the same original approval or adoption date used in the prior year form.

County Office of Education (COE) or District For a COE, enter the original approval date as the day the CDE approved the current LCAP. For a district, enter the original approval date as the day the COE approved the current LCAP	
Direct Funded Charter Enter the adoption date of the current LCAP	06/18/2026
Authorized Representative's Full Name	Habib Tahmas
Authorized Representative's Title	Sr. Director, Fiscal Services

Warning
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California Department of Education **Consolidated Application**

Sage Oak Charter School- Keppel (19 64642 0136127)

Status: Draft
Saved by: Jamie Houseworth
Date: 5/6/2026 12:02 PM

2026–27 Application for Funding

CDE Program Contact:
Consolidated Application Support Desk, Education Data Office, ConAppSupport@cde.ca.gov, 916-319-0297

Local Governing Board Approval

The local educational agency (LEA) is required to review and receive approval of their Application for Funding selections with their local governing board.

By checking this box the LEA certifies that the Local Board has approved the Application for Funding for the listed fiscal year	Yes

District English Learner Advisory Committee Review

Per Title 5 of the California Code of Regulations Section 11308, if your LEA has more than 50 English learners, then the LEA must establish a District English Learner Advisory Committee (DELAC) which shall review and advise on the development of the application for funding programs that serve English learners.

By checking this box the LEA certifies that parent input has been received from the District English Learner Committee (if applicable) regarding the spending of Title III funds for the listed fiscal year	Yes

Application for Categorical Programs

To receive specific categorical funds for a school year, the LEA must apply for the funds by selecting Yes below. Only the categorical funds that the LEA is eligible to receive are displayed.

Title I, Part A (Basic Grant) ESSA Sec. 1111 et seq. SACS 3010	Yes
Title II, Part A (Supporting Effective Instruction) ESEA Sec. 2104 SACS 4035	Yes
Title III English Learner ESEA Sec. 3102 SACS 4203	No
Title III Immigrant ESEA Sec. 3102 SACS 4201	No
Title IV, Part A (Student and School Support) ESSA Sec. 4101 SACS 4127	Yes

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California Department of Education **Consolidated Application**

Sage Oak Charter School- Keppel (19 64642 0136127)

Status: Certified
Saved by: Habib Tahmas
Date: 5/22/2026 12:51 PM

2026–27 Substitute System for Time Accounting

This certification may be used by auditors and by California Department of Education (CDE) oversight personnel when conducting audits and sub-recipient monitoring of the substitute time-and-effort system. Approval is automatically granted when the local educational agency (LEA) submits and certifies this data collection.

CDE Program Contact:

Hilary Thomson, Fiscal Oversight and Support Office, HThomson@cde.ca.gov, 916-323-0765

The LEA certifies that only eligible employees will participate in the substitute system and that the system used to document employee work schedules includes sufficient controls to ensure that the schedules are accurate.

Detailed information on documenting salaries and wages, including both substitute systems of time accounting, are described in Procedure 905 of the California School Accounting Manual posted on the CDE web site at https://www.cde.ca.gov/fg/ac/sa/.

2026–27 Request for authorization	Yes
LEA certifies that the following is a full disclosure of any known deficiencies with the substitute system or known challenges with implementing the system (Maximum 500 characters)	There are no known deficiencies or known challenges with implementing a substitute system.

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California Department of Education **Consolidated Application**

Sage Oak Charter School - South (37 75416 0139378)

Status: Certified
Saved by: Habib Tahmas
Date: 5/22/2026 12:49 PM

2026–27 Certification of Assurances

Submission of Certification of Assurances is required every fiscal year. A complete list of legal and program assurances for the fiscal year can be found at https://www.cde.ca.gov/fg/aa/co/ca26assurancestoc.asp.

CDE Program Contact:

Consolidated Application Support Desk, Education Data Office, ConAppSupport@cde.ca.gov, 916-319-0297

Consolidated Application Certification Statement

I hereby certify that all of the applicable state and federal rules and regulations will be observed by this applicant; that to the best of my knowledge the information contained in this application is correct and complete; and I agree to participate in the monitoring process regarding the use of these funds according to the standards and criteria set forth by the California Department of Education Federal Program Monitoring (FPM) Office. Legal assurances for all programs are accepted as the basic legal condition for the operation of selected projects and programs and copies of assurances are retained on site. I certify that we accept all assurances except for those for which a waiver has been obtained or requested. A copy of all waivers or requests is on file. I certify that actual ink signatures for this form are on file.

Authorized Representative's Full Name	Habib Tahmas
Authorized Representative's Signature	
Authorized Representative's Title	Sr. Director of Fiscal Services
Authorized Representative's Signature Date	05/22/2026

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2026–27 Protected Prayer Certification

Every Student Succeeds Act (ESSA) Section 8524 specifies federal requirements regarding constitutionally protected prayer in public elementary and secondary schools. This form meets the annual requirement and provides written certification.

CDE Program Contact:

Carrie Lopes, Title I Policy, Program, and Support Office, CLopes@cde.ca.gov, 916-319-0126

Protected Prayer Certification Statement

The local educational agency (LEA) hereby assures and certifies to the California State Board of Education that the LEA has no policy that prevents, or otherwise denies participation in, constitutionally protected prayer in public schools as set forth in the "Guidance on Constitutionally Protected Prayer in Public Elementary and Secondary Schools."

The LEA hereby assures that this page has been printed and contains an ink signature. The ink signature copy shall be made available to the California Department of Education upon request or as part of an audit, a compliance review, or a complaint investigation.

The authorized representative agrees to the above statement	Yes
Authorized Representative's Full Name	Habib Tahmas
Authorized Representative's Title	Sr. Director Fiscal Services
Authorized Representative's Signature Date	05/22/2026
Comment If the LEA is not able to certify at this time, then an explanation must be provided in the comment field. (Maximum 500 characters)	

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2026–27 LCAP Federal Addendum Certification

CDE Program Contact:
Local Agency Systems Support Office, LCAPAddendum@cde.ca.gov, 916-323-5233

Initial Application

To receive initial funding under the Every Student Succeeds Act (ESSA), a local educational agency (LEA) must have a plan approved by the State Educational Agency on file with the State. Within California, LEAs that apply for ESSA funds for the first time are required to complete the Local Control and Accountability Plan (LCAP), the LCAP Federal Addendum Template (Addendum), and the Consolidated Application (ConApp). The LCAP, in conjunction with the Addendum and the ConApp, serve to meet the requirements of the ESSA LEA Plan.

In order to initially apply for funds, the LEA must certify that the current LCAP has been approved by the local governing board or governing body of the LEA. As part of this certification, the LEA agrees to submit the LCAP Federal Addendum, that has been approved by the local governing board or governing body of the LEA, to the California Department of Education (CDE) and acknowledges that the LEA agrees to work with the CDE to ensure that the Addendum addresses all required provisions of the ESSA programs for which they are applying for federal education funds.

Returning Application

If the LEA certified a prior year LCAP Federal Addendum Certification data collection form in the Consolidated Application and Reporting System, then the LEA may use in this form the same original approval or adoption date used in the prior year form.

County Office of Education (COE) or District For a COE, enter the original approval date as the day the CDE approved the current LCAP. For a district, enter the original approval date as the day the COE approved the current LCAP	
Direct Funded Charter Enter the adoption date of the current LCAP	06/18/2026
Authorized Representative's Full Name	Habib Tahmas
Authorized Representative's Title	Sr. Director, Fiscal Services

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2026–27 Application for Funding

CDE Program Contact:
Consolidated Application Support Desk, Education Data Office, ConAppSupport@cde.ca.gov, 916-319-0297

Local Governing Board Approval

The local educational agency (LEA) is required to review and receive approval of their Application for Funding selections with their local governing board.

By checking this box the LEA certifies that the Local Board has approved the Application for Funding for the listed fiscal year	Yes

District English Learner Advisory Committee Review

Per Title 5 of the California Code of Regulations Section 11308, if your LEA has more than 50 English learners, then the LEA must establish a District English Learner Advisory Committee (DELAC) which shall review and advise on the development of the application for funding programs that serve English learners.

By checking this box the LEA certifies that parent input has been received from the District English Learner Committee (if applicable) regarding the spending of Title III funds for the listed fiscal year	Yes

Application for Categorical Programs

To receive specific categorical funds for a school year, the LEA must apply for the funds by selecting Yes below. Only the categorical funds that the LEA is eligible to receive are displayed.

Title I, Part A (Basic Grant) ESSA Sec. 1111et seq. SACS 3010	Yes
Title II, Part A (Supporting Effective Instruction) ESEA Sec. 2104 SACS 4035	Yes
Title III English Learner ESEA Sec. 3102 SACS 4203	No
Title III Immigrant ESEA Sec. 3102 SACS 4201	No
Title IV, Part A (Student and School Support) ESSA Sec. 4101 SACS 4127	Yes

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California Department of Education **Consolidated Application**

Sage Oak Charter School - South (37 75416 0139378)

Status: Certified
Saved by: Habib Tahmas
Date: 5/22/2026 12:50 PM

2026–27 Substitute System for Time Accounting

This certification may be used by auditors and by California Department of Education (CDE) oversight personnel when conducting audits and sub-recipient monitoring of the substitute time-and-effort system. Approval is automatically granted when the local educational agency (LEA) submits and certifies this data collection.

CDE Program Contact:

Hilary Thomson, Fiscal Oversight and Support Office, HThomson@cde.ca.gov, 916-323-0765

The LEA certifies that only eligible employees will participate in the substitute system and that the system used to document employee work schedules includes sufficient controls to ensure that the schedules are accurate.

Detailed information on documenting salaries and wages, including both substitute systems of time accounting, are described in Procedure 905 of the California School Accounting Manual posted on the CDE web site at https://www.cde.ca.gov/fg/ac/sa/.

2026–27 Request for authorization	Yes
LEA certifies that the following is a full disclosure of any known deficiencies with the substitute system or known challenges with implementing the system (Maximum 500 characters)	There is no known deficiencies or known challenges with implementing a substitute system.

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Coversheet

(Action) Approval of IXL Learning Quote Renewal

Section: XIII. Education Services
Item: A. (Action) Approval of IXL Learning Quote Renewal
Purpose: Vote
Submitted by:
Related Material: IXL Learning Quote #1614089-1.pdf

BACKGROUND:

IXL Learning Quote #1614089-1 is a multi-year subscription that provides approved Sage Oak users with access to curriculum and resources in ELA, math, science, and social studies.

RECOMMENDATION:

It is recommended the Board approve the renewal of the IXL Learning quote through June 30, 2028, to provide students with access to English language arts, math, science, and social studies curriculum for Sage Oak Charter School (#1885), Sage Oak Charter School – Keppel (#1886), and Sage Oak Charter School – South (#2051).

UPGRADE QUOTE

IXL Learning
777 Mariners Island Blvd., Suite 600
San Mateo, CA 94404

QUOTE # 1614089-1
DATE: MAY 5, 2026

TO:
Jen Gibson
Sage Oak Charter School
1473 FORD ST
REDLANDS, CA 92373

COMMENTS OR SPECIAL INSTRUCTIONS

SALESPERSON	ACCOUNT #	UPGRADE DURATION	QUOTE VALID UNTIL
Walker Jewell	A16-1584643	Through June 30, 2028	June 4, 2026

SUBSCRIPTIONS	QUANTITY	LIST UNIT PRICE	NET PRICE
Add students to IXL site license:			
Grades 1-12 Subjects: Math and ELA	850	$37.50	$31,875.00
Grades PK-12 Subjects: Math and ELA	150	$37.50	$5,625.00
Upgrade to 2-subjects or multiple subjects:			
Grades PK-12 Subjects: Science and Social studies	4150	$9.50	$39,425.00
		Total Price	$76,925.00

TOTALS	
Total Subscriptions List Price	$76,925.00
Grand Total	$76,925.00

Ordering instructions

We accept payment by purchase order, check, or credit card. To submit a purchase order for this quote, click here or go to https://www.ixl.com/po-upload and enter quote # 1614089-1. Paying over $5,000 via credit card will result in a 3% fee. For international accounts, we can accept wire transfers for an additional fee.

FOR REFERENCE ONLY

Once this order is processed, your subscription will include the following access.

POST-UPGRADE SUBSCRIPTIONS	QUANTITY
IXL site license, including:	
Grades PK-12 Subjects: IXL Complete (Math, ELA, Science, and Social studies)	4150
Grades 1-12 Subjects: Math and ELA	850

SALES CONTRACT

CONTRACT #1614089-1
May 5, 2026

IXL Learning
777 Mariners Island Blvd., Suite 600
San Mateo, CA 94404

CUSTOMER
Jen Gibson
Sage Oak Charter School
1473 FORD ST
REDLANDS, CA 92373

UPGRADE INFO

Salesperson	Account #	Quote #	Upgrade duration
Walker Jewell	**A16-1584643**	**1614089-1**	**Through June 30, 2028**

PAYMENT PLAN

	Amount	Invoice date
Installment 1	**$53,847.50 (70%)**	**June 30, 2026**
Installment 2	**$23,077.50 (30%)**	**June 30, 2027**
TOTAL	**$76,925**	

Price valid until June 4, 2026

ACCEPTANCE OF SALES CONTRACT
This is a binding agreement of payment between IXL Learning and the Purchaser. Your signature indicates that you have received, reviewed and accepted the attached Terms and Conditions of Sale and that you agree to pay the full upgrade price listed above within 60 days of the invoice date. Without a signature, your order may not be processed.

Acknowledged and agreed to:

AUTHORIZED SIGNATURE _____ **DATE** _____

Tim O'Brien, Asst. Superintendent, Business Svcs.

TERMS AND CONDITIONS OF SALE

THIS IS A LEGAL DOCUMENT ("SALES CONTRACT") BETWEEN THE PURCHASER SHOWN ABOVE ("YOU") AND IXL LEARNING ("SELLER"). PLEASE READ THIS AGREEMENT CAREFULLY. YOU AGREE TO BE BOUND BY ALL OF THE TERMS AND CONDITIONS OF THE AGREEMENT, AS WELL AS BY THE WEBSITE TERMS OF SERVICE, WHICH ARE INCORPORATED BY REFERENCE. NO VARIATION OF THESE TERMS AND CONDITIONS ARE BINDING ON SELLER UNLESS AGREED TO IN WRITING SIGNED BY AN AUTHORIZED REPRESENTATIVE OF IXL LEARNING.

1. **PRICING:** The quoted purchase price of the license is valid through the "Price valid until" date on page 1. This price is not binding on IXL unless you have accepted it by sending us an executed Sales Contract by that date.
2. **PAYMENT:** If IXL decides to accept your Sales Contract, we will issue you an invoice. Complete payment of the amount of the stated purchase price is due within sixty (60) days of the invoice date. If payment is not received by the Seller within 60 days, the invoice is considered past due. IXL licenses with past due payments will be put on hold and are subject to termination. Termination does not relieve the Purchaser of the obligation to pay fees due to the Seller.

   The full invoice amount must be paid either by check or by credit card. We accept Visa, MasterCard, American Express, and Discover.

   All checks should be mailed to:
   IXL Learning
   777 Mariners Island Blvd., Suite 600
   San Mateo, CA 94404

   Credit card payments may be made by phone at (855) 255-8800.

   Any late payment will incur interest at the rate of the lesser of 1% a month or the maximum permissible by law.
3. **CANCELLATION AND REFUND:** No cancellation will be accepted, and no refund issued, if it is more than thirty (30) days beyond the date of purchase for the license referenced in this Sales Contract. For cancellations and refunds of the license tendered under this Sales Contract to be accepted, the Seller must receive written notification of the cancellation within 30 days of purchase. Cancellations requested outside of the 30-day period will not be refunded, and the Purchaser will be responsible for completing the purchase as stated in the Sales Contract.
4. **LICENSES:** IXL grants you the right to provide access, through unique log-in IDs, to no more individuals than the quantity indicated on the first page. The terms and conditions of use for each of these individuals are governed by our website's Terms of Service. You agree to be responsible for their accounts, to monitor their use of their accounts, and to indemnify, defend, and hold us harmless for any claims arising out of or related to their use of IXL Learning's website and services. To the extent that these individuals are minors, you consent to our collection of their personal information as described in our Privacy Policy.

   Classroom and Site licenses will be activated immediately upon receipt of your payment unless another date is specified or agreed to by IXL. Activation confirmation will be sent to the e-mail address provided by the school or individual completing the purchase.

   If an individual who has an IXL account through a Classroom or Site license purchased by you is no longer affiliated with you, you may request that we deactivate the individual's account, or no longer associate it with your license, so that that license can be reassigned to another individual associated with your institution.

   If you are a teacher, you represent and warrant that you have permission and authorization from your school and/or district to use the Services as part of your curriculum, and for purposes of Children's Online Privacy Protection Act ("COPPA") compliance, you represent and warrant that you are entering into these Terms on behalf of your school and/or district.
5. **PRIVACY:** If you are a school, district, or teacher, you acknowledge and agree that you are responsible for complying with COPPA, meaning that you must obtain advance written consent from all parents or guardians whose children under 13 will be accessing the website and services and you represent and warrant that you have obtained that consent. When obtaining consent, you must provide parents and guardians with our Privacy Policy. You are to keep all consents on file and provide them to us if we request them.
6. **DISCLAIMER OF WARRANTIES. YOU EXPRESSLY UNDERSTAND AND AGREE THAT:**
   a. YOUR USE OF THE SERVICE IS AT YOUR SOLE RISK. THE SERVICE IS PROVIDED "AS IS," "AS AVAILABLE," AND WITH ALL FAULTS. IXL EXPRESSLY DISCLAIMS ALL WARRANTIES OF ANY KIND, WHETHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO THE IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, AND NONINFRINGEMENT.
   b. IXL MAKES NO WARRANTY THAT (i) THE SERVICE WILL MEET YOUR REQUIREMENTS, (ii) THE SERVICE WILL BE UNINTERRUPTED, TIMELY,

SECURE, OR ERROR-FREE, (iii) THE RESULTS THAT MAY BE OBTAINED FROM THE USE OF THE SERVICE WILL BE ACCURATE OR RELIABLE, (iv) THE QUALITY OF ANY PRODUCTS, SERVICES, INFORMATION, OR OTHER MATERIAL PURCHASED OR OBTAINED BY YOU THROUGH THE SERVICE WILL MEET YOUR EXPECTATIONS, AND (V) ANY ERRORS IN THE SERVICE WILL BE CORRECTED.

c. ANY MATERIAL DOWNLOADED OR OTHERWISE OBTAINED THROUGH THE USE OF THE SERVICE IS DONE AT YOUR OWN DISCRETION AND RISK AND THAT YOU WILL BE SOLELY RESPONSIBLE FOR ANY DAMAGE TO YOUR COMPUTER SYSTEM OR LOSS OF DATA THAT RESULTS FROM THE DOWNLOAD OF ANY SUCH MATERIAL.

d. NO ADVICE OR INFORMATION, WHETHER ORAL OR WRITTEN, OBTAINED BY YOU FROM IXL OR THROUGH OR FROM THE SERVICE SHALL CREATE ANY WARRANTY NOT EXPRESSLY STATED IN THE TOS.

Some states do not allow certain limitations on warranties, so certain of the above limitations may not apply to you.

7. **LIMITATION OF LIABILITY:** YOU EXPRESSLY UNDERSTAND AND AGREE THAT IXL SHALL NOT BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, CONSEQUENTIAL, OR EXEMPLARY DAMAGES, INCLUDING BUT NOT LIMITED TO, DAMAGES FOR LOSS OF PROFITS, GOODWILL, USE, DATA, OR OTHER INTANGIBLE LOSSES RESULTING FROM THE USE OR INABILITY TO USE THIS SERVICE. IN ALL INSTANCES, DAMAGES SHALL BE CAPPED AT ONE MONTH'S FEES.
8. **SEVERABILITY:** If any provision of this agreement is deemed invalid, illegal, or unenforceable, then that provision shall be deemed severable from these terms and shall not affect the validity and enforceability of any remaining provisions of this Sales Contract, which shall remain in full force and effect.
9. **ARBITRATION:** You agree that any dispute or claim you may have against IXL arising out of or related to this Sales Contract or the use of Services must be submitted to arbitration, before a single arbitrator appointed by JAMS/Endispute and conducted according to their rules in San Francisco, CA, USA, and that the determination of any such arbitrator shall be binding. The courts located in San Francisco, CA, USA, have exclusive jurisdiction over any judicial proceedings related to this agreement, and you waive any claim that such a court is an improper venue, inconvenient, or lacks jurisdiction over you.
10. **GOVERNING LAW:** The Sales Contract and the relationship between you and IXL are governed by the laws of the State of California without regard to conflict of law provisions.
11. **ENTIRE AGREEMENT:** This Sales Contract, which incorporates the Terms of Service by reference, is the final expression of the agreement between Purchaser and Seller and supersedes all prior representations, understandings, and agreements between the Purchaser and Seller relating to its subject matter. This Sales Contract cannot be modified, amended, or changed except in writing and signed by IXL.

Please contact IXL Learning with any questions regarding this sales contract:
Toll-free **(855) 255-8800** | Direct **(650) 372-4300** | E-mail **orders@ixl.com**
Completed sales contracts should be emailed to your sales consultant.

Coversheet

(Action) Approval of Revised 2026-27 Salary Schedules

Section: XIV. Human Resources
Item: A. (Action) Approval of Revised 2026-27 Salary Schedules
Purpose: Vote
Submitted by:
Related Material:
2026-27 Sage Oak Charter Schools Positions_Revised 6.11.2026.pdf
2026-27 Sage Oak Charter Schools Assistant Superintendent Salary Schedule_Revised 6.11.2026.pdf
2026-27 Sage Oak Charter Schools Professional_Management Salary Schedule_Revised 6.11.2026.pdf
2026-27 Sage Oak Charter Schools Certificated Educator Salary Schedule_Revised 6.11.2026.pdf
2026-27 Sage Oak Charter Schools Classified Hourly Salary Schedule_Revised 6.11.2026.pdf

RECOMMENDATION:

It is recommended the Board approve the revised 2026–27 salary schedules, which reflect a total COLA increase of 4.3%, effective July 1, 2026, as presented for Sage Oak Charter School (#1885), Sage Oak Charter School – Keppel (#1886), and Sage Oak Charter School – South (#2051).

Sage Oak Charter Schools Positions
Sage Oak Charter Schools, Sage Oak Charter School - Keppel, Sage Oak Charter School - South
FISCAL YEAR 2026-2027

BOARD APPROVED: Pending Board Approval
Effective July 1, 2026
Appendix A-6

Clerk Series	**Range**	**Schedule**
Education Services Clerk	1	12 Months
Software Application Clerk	1	12 Months
Technician Series	**Range**	**Schedule**
Community Provider Services Technician	2	12 Months
Hardware Support Technician	2	12 Months
Human Resources Technician	2	12 Months
Information Technology Technician	2	12 Months
Operations and Accountability Technician	2	12 Months
Office Technician	2	12 Months
Registrar Technician	2	12 Months
Support Technician	2	12 Months
Warehouse Technician	2	12 Months
Paraprofessional Series	**Range**	**Schedule**
Bilingual Paraprofessional	2	180 Days / 11 Months
College Student Instructor	2	180 Days / 11 Months
Paraprofessional	2	180 Days / 11 Months
Specialist Series	**Range**	**Schedule**
Accounts Payable Specialist	3	12 Months
Accounting Specialist	3	12 Months
Community Provider Services Specialist	3	12 Months
Enrollment Specialist	3	12 Months
Events Specialist	3	12 Months
High School Registrar Specialist	3	12 Months
Information Technology Specialist	3	12 Months
Library and Logistics Specialist	3	12 Months
Operations & Accountability Specialist	3	12 Months
Parent Support Specialist	3	12 Months
Payroll Specialist	3	12 Months
Purchasing and Order Support Specialist	3	12 Months
Registrar Specialist	3	12 Months
Special Education Specialist	3	12 Months
Special Programs Specialist	3	12 Months
Warehouse Specialist	3	12 Months
Senior Specialist Series	**Range**	**Schedule**
Senior Specialist, Accounting	4	12 Months
Senior Specialist, Digital Media and Communication	4	12 Months

Senior Specialist, Employee Relations	4	12 Months
Senior Specialist, Hiring and Recruitment	4	12 Months
Senior Specialist, Human Resources Operations	4	12 Months
Senior Specialist, Payroll	4	12 Months
Senior Specialist, Purchasing and Order Support	4	12 Months
Senior Specialist, Special Education	4	12 Months
Senior Specialist, Student Information and Reporting	4	12 Months
Senior Specialist, Student Services	4	12 Months
Administrative Assistant Series	**Range**	**Schedule**
Administrative Assistant, Education Services	4	12 Months
Executive Assistant II	10	12 Months
Executive Assistant I	9	12 Months
Senior Administrative Assistant, Education Services	8B	12 Months
Senior Administrative Assistant, Outreach & Development	8B	12 Months
Senior Administrative Assistant, Special Education	8B	12 Months
Special Education Classified Series	**Range**	**Schedule**
Speech and Language Pathologist Assistant	5	180 Days / 11 Months
Certificated Occupational Therapist Assistant	5	180 Days / 11 Months
Certificated Teacher Series	**Range**	**Schedule**
Adapted Physical Education Teacher	7	190 Days / 11 Months
Art Teacher	7	190 Days / 11 Months
Education Advisor	7	190 Days / 11 Months
Intervention Teacher	7	190 Days / 11 Months
Personalized Learning Teacher	6	190 Days / 11 Months
Personalized Learning Teacher +	7	190 Days / 11 Months
Mild/Moderate Special Education Teacher	7	190 Days / 11 Months
Extensive Support Needs Teacher	7	190 Days / 11 Months
Virtual Learning Teacher	7	190 Days / 11 Months
Other Certificated Series	**Range**	**Schedule**
Associated Student Body and Student Success Support	7	190 Days / 11 Months
ASB Advisor	7	190 Days / 11 Months
Reading Specialist	7	190 Days / 11 Months
Special Education Academic Assessor	7	190 Days / 11 Months
Special Education Teacher on Special Assignment (TOSA)	7	190 Days / 11 Months
Teacher on Special Assignment (TOSA), Athletics	7	190 Days / 11 Months
Technology Training Facilitator	9	210 Days/ 12 Months
Assessment Support and Training Facilitator	14	215 Days / 12 Months
Education Services Facilitator	14	215 Days / 12 Months
English Learner Assessment and State Testing Facilitator	14	215 Days / 12 Months
Extended Learning Facilitator	14	215 Days / 12 Months
High School Facilitator	14	215 Days / 12 Months
Middle School Facilitator	14	215 Days / 12 Months
Student Services Facilitator	14	215 Days / 12 Months

Virtual Learning Academy Facilitator	14	215 Days / 12 Months
Manager Series	**Range**	**Schedule**
Manager I, Events	8A	11 Months
Fiscal Analyst	8B	12 Months
Manager II, Education Services	8B	12 Months
Manager II, Hiring & Recruitment	8B	12 Months
Manager II, Oakschool	8B	12 Months
Manager II, Office	8B	12 Months
Manager II, Registrar	8B	12 Months
Manager II, Software Systems	8B	12 Months
Manager II, Special Education Service	8B	12 Months
Manager III, Compensation and Benefits	8C	12 Months
Manager III, Facilities	8C	12 Months
Manager III, Payroll	8C	12 Months
Manager III, Purchasing and Order Support	8C	12 Months
Manager III, Systems Integration	8C	12 Months
Manager III, Vendor Services	8C	12 Months
Lead Manager III, Events	8C	12 Months
Manager IV, Accounting	9	12 Months
Manager IV, Finance and Budget	9	12 Months
Counselor Series	**Range**	**Schedule**
School Counselor	11A	190 Days / 11 Months
High School Counselor	11B	200 Days / 12 Months
Special Education Series	**Range**	**Schedule**
Behavioral Specialist	9	190 Days / 11 Months
Occupational Therapist	12	190 Days / 11 Months
School Psychologist	13	190 Days / 11 Months
School Social Worker	12	190 Days / 11 Months
Speech and Language Pathologist	13	190 Days / 11 Months
Classified Administrator Series	**Range**	**Schedule**
Senior Administrator, Employee Relations	14	225 Days / 12 Months
Senior Administrator, Hiring and Recruitment	14	225 Days / 12 Months
Senior Administrator of IT Support Services	14	225 Days / 12 Months
Senior Administrator of IT, Data & Student Security	14	225 Days / 12 Months
Senior Administrator, Operations and Accountability	14	225 Days / 12 Months
Senior Administrator, Oakschool	14	225 Days / 12 Months
Senior Administrator, Parent Support	14	225 Days / 12 Months
Senior Administrator, Public Information and Media	14	225 Days / 12 Months
Senior Administrator, Student Information and Reporting	14	225 Days / 12 Months
Certificated Coordinator Series	**Range**	**Schedule**
504 and SST Coordinator	16	215 Days / 12 Months
Accountability Coordinator	16	215 Days / 12 Months
Curriculum Coordinator	16	215 Days / 12 Months

Leadership Series	**Range**	**Schedule**
High School Assistant Principal	16	215 Days / 12 Months
Assistant Principal	15	210 Days / 12 Months
Personalized TK-8 Learning Academy Assistant Principal	15	210 Days / 12 Months
Virtual Learning Academy Assistant Principal	15	210 Days / 12 Months
Special Education Program Specialist	16	215 Days / 12 Months
Assistant Director of Student Services	17	220 Days / 12 Months
Assistant Director of Accountability	17	220 Days / 12 Months
Assistant Director of Special Education	17	220 Days / 12 Months
Director I, Business Services	18A	220 Days / 12 Months
Director I, Compensation and Benefits	18A	220 Days / 12 Months
Director II, Human Resources: Talent & Engagement	18B	220 Days / 12 Months
Director II, Information Technology	18B	220 Days / 12 Months
Director II, Operations and Accountability	18B	220 Days / 12 Months
Director II, Personalized Learning/Principal	18B	220 Days / 12 Months
Director II, Secondary Education/Principal	18B	220 Days / 12 Months
Director II, Student Learning and Innovation	18B	220 Days / 12 Months
Director II, Student Services	18B	220 Days / 12 Months
Director II, Virtual Learning/Principal	18B	220 Days / 12 Months
Senior Director of Fiscal Services	20	220 Days / 12 Months
Senior Director of Special Education	20	220 Days / 12 Months
Chief of Outreach and Development	20	220 Days / 12 Months
Chief Technology Officer	20	220 Days / 12 Months
Assistant Superintendent Series	**Range**	**Schedule**
Assistant Superintendent of Business Services	21	220 Days / 12 Months
Assistant Superintendent of Education Services	21	220 Days / 12 Months
Assistant Superintendent of Human Resources	21	220 Days / 12 Months
Assistant Superintendent of Operations and Accountability	21	220 Days / 12 Months
Superintendent Series	**Range**	**Schedule**
Superintendent of Schools/Chief Education Officer	22	220 Days / 12 Months

Sage Oak Charter Schools
Assistant Superintendent Salary Schedule
Sage Oak Charter Schools, Sage Oak Charter School - Keppel, Sage Oak Charter School - South

FISCAL YEAR 2026-2027

BOARD APPROVAL: Pending Board Approval
EFFECTIVE: July 1, 2026
Appendix A-4

						Longevity Steps			
Range	**STEP A**	**STEP B**	**STEP C**	**STEP D**	**STEP E**	**STEP K* 11 yrs. ($2,000)**	**STEP L* 16 yrs. ($4,000)**	**STEP M* 21 yrs. ($6,000)**	**STEP N* 26 yrs. ($8,000)**
21	$213,815	$220,229	$226,836	$233,641	$240,651	$242,651	$244,651	$246,651	$248,651

ADDITIONAL STIPEND

Advanced Degree Stipend: All staff may be eligible for an annual stipend of $5,000 (paid over 11 or 12 months while in active status) for holding a Master's degree or higher in any field.

Advanced Degree Stipend Eligibility Requirements:
1) Eligibility is determined by Human Resources
2) Official transcripts must be submitted directly from the college or university to Sage Oak Human Resources.

Advanced Degree Stipend Calculation: The stipend is prorated based on FTE and the portion of the year the employee is actively working (e.g., a 0.40 FTE employee working the full year would receive 40% of the stipend; if working only part of the year, the amount is prorated accordingly).

***Longevity Steps:** Employees in salary range 21 are eligible for longevity steps based on years of service and completion of the prior step. Eligibility and breakdown of pay increases are referenced below.

Step K	
Eligibility:	**Completion of Step E:** Employees must complete Step E with a full year of service as defined by Sage Oak Charter Schools' Salary Advancement policy.
	Ten (10) Years of Service: Employees must have completed 10 years of service at Sage Oak
Awarded:	At the start of the 11th year of service.

Step L	
Eligibility:	**Completion of Step K**: Employees must complete Step K with a full year of service as defined by Sage Oak Charter Schools' Salary Advancement policy.
	Fifteen (15) Years of Service: Employees must have completed 15 years of service at Sage Oak.
Awarded:	At the start of the 16th year of service.

Step M	
Eligibility:	**Completion of Step L**: Employees must complete Step L with a full year of service as defined by Sage Oak Charter Schools' Salary Advancement policy.
	Twenty (20) Years of Service: Employees must have completed 20 years of service at Sage Oak.
Awarded:	At the start of the 21st year of service.

Step N	
Eligibility:	**Completion of Step M**: Employees must complete Step M with a full year of service as defined by Sage Oak Charter Schools' Salary Advancement policy.
	Twenty-Five (25) Years of Service: Employees must have completed 25 years of service at Sage Oak.
Awarded:	At the start of the 26th year of service.

Longevity Steps for Range 19	**Cumulative Dollar Increase per Work Anniversary**				**Total Increase to the base salary**
STEP K Beginning of Year 11	$2,000				$2,000
STEP L Beginning of Year 16	~	$2,000			$4,000
STEP M Beginning of Year 21	~	~	$2,000		$6,000
STEP N Beginning of Year 26	~	~	~	$2,000	$8,000

Sage Oak Charter Schools Professional/Management Salary Schedules
Sage Oak Charter Schools, Sage Oak Charter School - Keppel, Sage Oak Charter School - South
FISCAL YEAR 2026-2027

BOARD APPROVED: Pending Board Approval
Effective: July 1, 2026
Appendix A-2

Range	STEP A	STEP B	STEP C	STEP D	STEP E	STEP F	STEP G	STEP H	STEP I	STEP J	Longevity Steps: STEP K* 11 yrs. ($2,000)	STEP L* 16 yrs. ($4,000)	STEP M* 21 yrs. ($6,000)	STEP N* 26 yrs. ($8,000)
8A	$73,284	$76,413	$79,542	$82,672	$85,801	$88,929	$92,059	$95,188	$98,044	$99,109	$101,109	$103,109	$105,109	$107,109
8B	$79,945	$83,360	$86,774	$90,187	$93,601	$97,013	$100,428	$103,842	$106,958	$108,119	$110,119	$112,119	$114,119	$116,119
8C	$84,148	$88,039	$91,929	$95,818	$99,710	$103,600	$107,489	$111,380	$115,316	$117,164	$119,164	$121,164	$123,164	$125,164
9	$88,350	$92,717	$97,083	$101,449	$105,819	$110,186	$114,551	$118,918	$123,674	$126,209	$128,209	$130,209	$132,209	$134,209
10	$92,768	$97,354	$101,938	$106,522	$111,110	$115,695	$120,278	$124,864	$129,858	$132,519	$134,519	$136,519	$138,519	$140,519
11A	$89,860	$92,654	$95,447	$98,239	$101,032	$106,940	$109,816	$112,694	$116,073	$120,057	$122,057	$124,057	$126,057	$128,057
11B	$94,590	$97,531	$100,471	$103,409	$106,349	$114,755	$117,840	$120,928	$124,556	$128,828	$130,828	$132,828	$134,828	$136,828
12	$103,842	$106,808	$109,776	$112,743	$115,708	$118,677	$121,643	$124,610	$127,102	$131,946	$133,946	$135,946	$137,946	$139,946
13	$103,227	$106,505	$109,782	$113,059	$116,337	$119,612	$122,891	$126,166	$129,953	$134,127	$136,127	$138,127	$140,127	$142,127
14	$113,765	$116,302	$120,004	$123,708	$127,410	$131,112	$134,817	$138,518	$142,674	$147,212	$149,212	$151,212	$153,212	$155,212
15	$132,021	$135,982	$140,061	$144,263	$148,591	$153,049	$157,640				$159,640	$161,640	$163,640	$165,640
16	$135,164	$139,220	$143,396	$147,698	$152,129	$156,693	$161,394				$163,394	$165,394	$167,394	$169,394
17	$139,524	$144,826	$150,330	$156,042	$161,972	$168,126	$175,019				$177,019	$179,019	$181,019	$183,019
18A	$150,284	$158,655	$167,026	$175,398	$183,769						$185,769	$187,769	$189,769	$191,769
18B	$161,042	$168,606	$175,739	$183,135	$190,604						$192,604	$194,604	$196,604	$198,604
19	$180,575	$185,464	$190,354	$200,134	$205,025						$207,025	$209,025	$211,025	$213,025
20	$200,106	$206,309	$212,705	$219,299	$225,878						$227,878	$229,878	$231,878	$233,878

- Annual step advancement on the salary schedule occurs on July 1 (or August 1 for 11-month employees) in accordance with Sage Oak Charter Schools' salary advancement policy. Salary schedule adjustments may be made at any time at the discretion of the Board of Directors and are subject to approval as part of the annual fiscal plan.

- Annual salaries reflect a 1.0 full time equivalent (FTE) in employment. If the employee is part time, the rate will be modified to reflect the same FTE percentage.

ADDITIONAL STIPEND

Advanced Degree Stipend: All staff may be eligible for an annual stipend of $5,000 (paid over 11 or 12 months while in active status) for holding a Master's degree or higher in any field.

Advanced Degree Stipend Eligibility Requirements:
1) Eligibility is determined by Human Resources
2) Official transcripts must be submitted directly from the college or university to Sage Oak Human Resources.

Advanced Degree Stipend Calculation: The stipend is prorated based on FTE and the portion of the year the employee is actively working (e.g., a 0.40 FTE employee working the full year would receive 40% of the stipend; if working only part of the year, the amount is prorated accordingly).

***Longevity Steps:** Employees in salary ranges 8-20 are eligible for longevity steps based on years of service and completion of the prior step. Eligibility and breakdown of pay increases are referenced below.

Step K	
Eligibility:	**Completion of Final Non-Longevity Step:** Employees must complete one full year of service on the final non-longevity step, as defined by Sage Oak Charter Schools' Salary Advancement policy.
	Ten (10) Years of Service: Employees must have completed 10 years of service at Sage Oak
Awarded:	At the start of the 11th year of service.

Step L	
Eligibility:	**Completion of Step K**: Employees must complete Step K with a full year of service as defined by Sage Oak Charter Schools' Salary Advancement policy.
	Fifteen (15) Years of Service: Employees must have completed 15 years of service at Sage Oak.
Awarded:	At the start of the 16th year of service.

Step M	
Eligibility:	**Completion of Step L**: Employees must complete Step L with a full year of service as defined by Sage Oak Charter Schools' Salary Advancement policy.
	Twenty (20) Years of Service: Employees must have completed 20 years of service at Sage Oak.
Awarded:	At the start of the 21st year of service.

Step N	
Eligibility:	**Completion of Step M**: Employees must complete Step M with a full year of service as defined by Sage Oak Charter Schools' Salary Advancement policy.
	Twenty-Five (25) Years of Service: Employees must have completed 25 years of service at Sage Oak.
Awarded:	At the start of the 26th year of service.

Longevity Steps for Ranges 8-20	Cumulative Dollar Increase per Work Anniversary				Total Increase to the base salary
STEP K Beginning of Year 11	$2,000				$2,000
STEP L Beginning of Year 16	~	$2,000			$4,000
STEP M Beginning of Year 21	~	~	$2,000		$6,000
STEP N Beginning of Year 26	~	~	~	$2,000	$8,000

Sage Oak Charter Schools Certificated Educator Salary Schedule
Sage Oak Charter Schools, Sage Oak Charter School - Keppel, Sage Oak Charter School - South

FISCAL YEAR 2026-2027

BOARD APPROVED: Pending Board Approval
EFFECTIVE: July 1, 2026
Appendix A-3

Range 6	Annual Salary	Range 7	Annual Salary
STEP A	$69,605	**STEP A**	$79,424
STEP B	$71,797	**STEP B**	$81,685
STEP C	$75,062	**STEP C**	$83,947
STEP D	$77,342	**STEP D**	$86,207
STEP E	$78,573	**STEP E**	$88,469
STEP F	$79,959	**STEP F**	$90,730
STEP G	$80,893	**STEP G**	$92,991
STEP H	$81,701	**STEP H**	$95,251
STEP I	$84,154	**STEP I**	$97,515
STEP J	$84,997	**STEP J**	$98,489
STEP K	$85,846	**STEP K**	$99,473
STEP L	$86,704	**STEP L**	$100,468
STEP M	$89,305	**STEP M**	$102,477
STEP N	$90,198	**STEP N**	$103,501
STEP O	$91,100	**STEP O**	$104,536
STEP P	$92,922	**STEP P**	$106,627
STEP Q	$93,851	**STEP Q**	$107,694
STEP R	$94,791	**STEP R**	$108,771
STEP S	$96,686	**STEP S**	$110,946
STEP T	$97,654	**STEP T**	$112,056
STEP U	$97,654	**STEP U**	$112,056
STEP V	$97,654	**STEP V**	$112,056
STEP W	$103,630	**STEP W**	$118,915
STEP X	$103,630	**STEP X**	$118,915
STEP Y	$103,630	**STEP Y**	$118,915
STEP Z	$109,973	**STEP Z**	$126,193
STEP AA	$109,973	**STEP AA**	$126,193
STEP AB	$109,970	**STEP AB**	$126,193
STEP AC	$116,700	**STEP AC**	$133,917
STEP AD	$119,033	**STEP AD**	$136,595

- Annual step advancement on the salary schedule occurs on July 1 (or August 1 for 11-month employees) in accordance with Sage Oak Charter Schools' salary advancement policy. Salary schedule adjustments may be made at any time at the discretion of the Board of Directors and are subject to approval as part of the annual fiscal plan.

ADDITIONAL STIPENDS/COMPENSATION (Certificated)

Advanced Degree Stipend: Certificated staff on range 6 and 7 may be eligible for an annual stipend of $5,000 (paid over 11 months at $454.55 per month while in active status) for holding a Master's degree or higher in any field.

Advanced Degree Stipend Eligibility Requirements:
1) The staff member must be serving in a certificated position assigned to salary range 6 or 7 on STEPS F-AD.
2) Eligibility is determined by Human Resources
3) Official transcripts must be submitted directly from the college or university to Sage Oak Human Resources.

Advanced Degree Stipend Calculation: The stipend is prorated based on FTE and the portion of the year the employee is actively working (e.g., a 0.40 FTE employee working the full year would receive 40% of the stipend; if working only part of the year, the amount is prorated accordingly).

Additional Regular for Personalized Learning Teacher (PLT), Personalized Learning Teacher Plus (PLT+), Education Advisor (EA), Virtual Learning Teacher (VLT), and Special Education (M/M SPED and ESNT) Teacher positions: Staff in eligible roles may receive additional pay for each student exceeding their 1.0 FTE from August through June. See table below for rates.

Grade Band	Teachers Eligible	Monthly Stipend Per Student
K-8	PLT, PLT+,VLT, M/M SPED, and ESNT	$360
9-12	EA, M/M SPED, and ESNT	$460

Live Teaching Class Size Overage: Education Advisors (EAs) may receive additional compensation for teaching students beyond their 1.0 FTE caseload in live teaching classes from September through June. To qualify, EAs must teach students for a minimum number of days within a learning period. Compensation is based on the number of students exceeding the 1.0 FTE threshold in a given month. See table below for details.

Range of Students	Monthly	Additional Hrs.
110-144	$400	1-3
145-179	$600	4-6
180-214	$800	7-9

Sage Oak Charter Schools Classified Hourly Salary Schedule
Sage Oak Charter Schools, Sage Oak Charter School - Keppel, Sage Oak Charter School - South
FISCAL YEAR 2026-2027

BOARD APPROVED: Pending Board Approval
Effective July 1, 2026
Appendix A-1

Range	STEP A	STEP B	STEP C	STEP D	STEP E	STEP F	STEP G	STEP H	STEP I	STEP J	Longevity Steps: STEP K* 11 yrs. (2%)	STEP L* 16 yrs. (4%)	STEP M* 21 yrs. (6%)	STEP N* 26 yrs. (8%)
1	$21.33	$21.97	$22.63	$23.31	$24.01	$24.73	$25.47	$26.23	$27.02	$27.83	$28.38	$28.95	$29.53	$30.12
2	$25.99	$26.76	$27.57	$28.40	$29.25	$30.12	$31.03	$31.96	$32.92	$33.91	$34.59	$35.28	$35.98	$36.70
3	$30.14	$31.04	$31.98	$32.93	$33.92	$34.94	$35.98	$37.07	$38.17	$39.32	$40.11	$40.91	$41.73	$42.56
4	$34.95	$35.99	$37.08	$38.19	$39.34	$40.52	$41.73	$42.98	$44.28	$45.60	$46.51	$47.44	$48.39	$49.36
5	$37.64	$38.77	$39.93	$41.13	$42.37	$43.63	$44.94	$46.29	$47.68	$49.10	$50.09	$51.09	$52.11	$53.15

- Annual step advancement on the salary schedule occurs on July 1 (or August 1 for 11-month employees) in accordance with Sage Oak Charter Schools' salary advancement policy. Salary schedule adjustments may be made at any time at the discretion of the Board of Directors and are subject to approval as part of the annual fiscal plan.

ADDITIONAL STIPEND

Advanced Degree Stipend: All staff may be eligible for an annual stipend of $5,000 (paid over 22 or 24 pay periods while in active status) for holding a Master's degree or higher in any field.

Advanced Degree Stipend Eligibility Requirements:
1) Eligibility is determined by Human Resources
2) Official transcripts must be submitted directly from the college or university to Sage Oak Human Resources.

Advanced Degree Stipend Calculation: The stipend is prorated based on FTE and the portion of the year the employee is actively working (e.g., a 0.40 FTE employee working the full year would receive 40% of the stipend; if working only part of the year, the amount is prorated accordingly).

***Longevity Steps:** Employees in salary ranges 1-5 are eligible for longevity steps based on years of service and completion of the prior step. Eligibility and breakdown of pay increases are referenced below.

Step K	
Eligibility:	**Completion of Step J:** Employees must complete Step J with a full year of service as defined by Sage Oak Charter Schools' Salary Advancement policy.
	Ten (10) Years of Service: Employees must have completed 10 years of service at Sage Oak
Awarded:	At the start of the 11th year of service.

Step L	
Eligibility:	**Completion of Step K**: Employees must complete Step K with a full year of service as defined by Sage Oak Charter Schools' Salary Advancement policy.
	Fifteen (15) Years of Service: Employees must have completed 15 years of service at Sage Oak.
Awarded:	At the start of the 16th year of service.

Step M	
Eligibility:	**Completion of Step L**: Employees must complete Step L with a full year of service as defined by Sage Oak Charter Schools' Salary Advancement policy.
	Twenty (20) Years of Service: Employees must have completed 20 years of service at Sage Oak.
Awarded:	At the start of the 21st year of service.

Step N	
Eligibility:	**Completion of Step M**: Employees must complete Step M with a full year of service as defined by Sage Oak Charter Schools' Salary Advancement policy.
	Twenty-Five (25) Years of Service: Employees must have completed 25 years of service at Sage Oak.
Awarded:	At the start of the 26th year of service.

Longevity Steps for Ranges 1-5	Cumulative Percentage Increase per Work Anniversary				Total Increase to the base salary
STEP K Beginning of Year 11	2%				2%
STEP L Beginning of Year 16	~	2%			4%
STEP M Beginning of Year 21	~	~	2%		6%
STEP N Beginning of Year 26	~	~	~	2%	8%

Coversheet

(Action) Approval of Spark Hire Order Form Renewal

Section: XIV. Human Resources
Item: B. (Action) Approval of Spark Hire Order Form Renewal
Purpose: Vote
Submitted by:
Related Material: Spark Hire Order Form Renewal.pdf

RECOMMENDATION:

It is recommended the Board approve the renewal of the Spark Hire agreement through July 8, 2029, to provide one-way virtual interview services in support of recruitment efforts at Sage Oak Charter School (#1885), Sage Oak Charter School – Keppel (#1886), and Sage Oak Charter School – South (#2051).

SPARK HIRE

Spark connections. Hire together.

Spark Hire Order Form

Sage Oak Charter Schools

From our CEO

Vanessa,

Thank you for your continued support of Spark Hire!

Since 2012, we've helped thousands of organizations just like yours.

While our solutions have evolved over the years, our commitment to delivering an exceptional customer experience remains the same.

It's our goal to be the best company you do business with and we can't wait to prove it.

We appreciate the opportunity and look forward to the continued relationship.

Josh Tolan
CEO, Spark Hire

From our customers

Spark Hire Order Form

Customer Information	
Entity Name ("Customer")	Sage Oak Charter Schools
AP Contact Name	Sandra Gonzales
AP Email	ap@sageoak.education
AP Phone Number	888-435-4445
Billing Address	1473 Ford St., Ste. 105
Billing City	Redlands
Billing State/Province	CA
Billing Zip/Postal Code	92399
Billing Country	USA

Product	Price	Quantity	Subtotal *
3001-10000 Students	$0.00	1	$0.00
Meet Enterprise K-12	$14,514.00	1	$14,514.00

Total Amount * (US Dollars) **$14,514.00**

*plus any applicable sales taxes

Order Details	
Order Start Date	2026-07-08
Order End Date	2029-07-08
Billing Frequency	Annual
Payment Method *(Can be changed later with our Finance team)*	
Months Serviced	36

Order Details	
Number of Employees	51-200

Special Notes:

By signing this Order Form, Customer agrees to pay Spark Hire the Total Amount via a payment schedule defined by the Billing Frequency.

Customer warrants that the "**Number of Employees**" documented on this Order Form is an accurate representation of the size of their organization. Since the Number of Employees factors into the price quote, if the Number of Employees is found to be materially inaccurate, Spark Hire reserves the right to increase the price during the Term or upon the renewal.

If Customer's Payment Method is Credit Card, Spark Hire will automatically charge the credit card on file based on the Total Amount and Billing Frequency.

If Customer's Payment Method is ACH/Wire or Check, Customer agrees to submit payment according to the Billing Frequency.

The **"Order Start Date"** is specified in this Order Form and the initial payment is due no later than the Order Start Date. The **"Order End Date"** is also specified in this Order Form.

Subscriptions are non-cancelable before their Order End Date. Customer is responsible for paying Spark Hire the Total Amount.

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Upon signature by Customer and submission to Spark Hire, this Order Form shall become legally binding.

The signatory below acknowledges that they are authorized to sign on behalf of Customer and bind Customer to this Order Form.

The total contract value of $14,514 will be invoiced annually in the amount of $4,838 per year, plus applicable taxes. Payment is not required in full upfront.

Agreed to by:

Name	

Name
Job Title
Date

Coversheet

(Action) Approval of 2026-27 Sage Oak Charter Schools English Learner Master Plan

Section: XV. Operations & Accountability
Item: A. (Action) Approval of 2026-27 Sage Oak Charter Schools English Learner Master Plan
Purpose: Vote
Submitted by:
Related Material:
2026-27 Sage Oak Charter Schools EL Master Plan_Presentation.pdf
2026-27 Sage Oak Charter Schools EL Master Plan_Summary of Changes.pdf
2026-27 Sage Oak Charter Schools EL Master Plan_Redline.pdf
2026-27 Sage Oak Charter Schools EL Master Plan.pdf

BACKGROUND:

The EL Master Plan for the 2026–27 school year updates the English Learner Roadmap link, revises English learner demographic information, clarifies that Transitional Kindergarten students are exempt from the Initial ELPAC under AB 2268, adds clarification regarding LEA discretion to test a student when a language other than English is indicated only on the fourth question of the Home Language Survey, removes references to the Ellevation platform because Sage Oak no longer uses it, and removes specific school-year Initial ELPAC testing dates to align with the general state-mandated administration window.

RECOMMENDATION:

It is recommended the Board approve the 2026-27 English Learner (EL) Master Plan as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).

SAGE OAK
CHARTER SCHOOLS

English Learner Master Plan Changes 2026/2027

Revisions

1. Initial ELPAC Grade and Age Range
2. Home Language Survey
3. Ellevation Platform

SAGE OAK
CHARTER SCHOOLS

Thank You!

English Learner (EL) Master Plan Changes for the 2026/2027 School Year

(Note: page numbers reference the redline version)

Page(s)	Change
3	Updated the link to reflect current information about the English Learner Roadmap to https://www.cde.ca.gov/sp/ml/roadmap.asp
4, 5	In California, Transitional Kindergarten (TK) students are exempt from the Initial ELPAC under AB 2268, which took effect in June 2024. Updated: "Sage Oak Charter Schools serve a student population of *kindergarten* through grade 12." "All students in *kindergarten* through grade twelve (through twenty-one years of age), whose primary language is a language other than English, must take the Initial ELPAC within 30 calendar days after they are first enrolled in a California public school or 60 calendar days prior to instruction, but not before July 1, per ELPAC regulations."
4	Updated the demographic of English Learners to reflect our school's current information: "Our English Learners make up approximately 2% of our student population. There are 13 languages spoken by Sage Oak EL students, with most of their primary language being Spanish."
4	Added additional information regarding the mandated process to determine if a student is eligible to take the Initial ELPAC to address the 4th question on the Home Language Survey: "If a language other than English is indicated on the fourth question only, then the student may be tested at the LEA's discretion."
5, 10, 19, 24, 26	Sage Oak is no longer using the Ellevation platform. Removed "Elevation" from any procedural practices.
6	Removed the specific years of the school's testing window to better align with the general state-mandated window for administration of the Initial ELPAC from July 1st to June 30th of the current school year.

Sage Oak Charter Schools

English Learner Master Plan

2026~~5~~-2027~~6~~

Presented by: Sage Oak Charter Schools

Board Approved June 11, 2026~~June 12, 2025~~

Commitment and Purpose

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.

Goals and Objectives

The Sage Oak English Learner Master Plan serves as a guide and gives an overview of the programs and resources provided for our English learners. The plan is centered around our vision, core beliefs, and goals for all students in our schools and affirms our commitment to each English learner as an individual by honoring their diversity and accelerating their English language proficiency while preparing them for the rigors of college, future careers, and becoming a productive and engaged global citizen.

The English Learner Master Plan provides a clear statement of policies related to the development, implementation, and evaluation of English learner programs and services that are required by all state and federal guidelines. These policies are based on current resources and initiatives related to the 2012 CA ELD Standards, the 2014 English Language Arts (ELA)/English Language Development (ELD) Framework and the California English Learner Roadmap and are in place in order to:

- Ensure that English learners will achieve English language proficiency as quickly as possible.
- Support the academic success of English learners by consistently providing high-quality services designed to meet their academic and linguistic needs.
- Develop cross-cultural awareness and appreciation of one's own culture and language, encourage bilingualism, and enhance the positive self-esteem of English learners.
- Embrace and encourage parent and community involvement in meeting the needs of English learners.
- Provide staff and parent training in the implementation of effective instructional programs and teaching strategies for English learners.
- Providing a process for monitoring the effectiveness of the program.

Guiding Principles of the California English Learner Roadmap

The California English Learner Roadmap will guide Sage Oak to continuous improvement of the EL program over time. The Roadmap emphasizes four principles and approaches to teaching and learning that result in a more powerful, twenty-first-century education for all English learners.

Principle One: Assets-Oriented and Needs-Responsive Schools

Pre-schools and schools are responsive to different English learner (EL) strengths, needs, and identities and support the socio-emotional health and development of English learners. Programs value and build upon the cultural and linguistic assets students bring to their education in safe and affirming school climates. Educators value and build strong family, community, and school partnerships.

Principle Two: Intellectual Quality of Instruction and Meaningful Access

English learners engage in intellectually rich, developmentally appropriate learning experiences that foster high levels of English proficiency. These experiences integrate language development, literacy, and content learning, as well as provide access for comprehension and participation through native language instruction and scaffolding. English learners have meaningful access to a full standards-based and relevant curriculum and the opportunity to develop proficiency in English and other languages.

Principle Three: System Conditions that Support Effectiveness

Each level of the school system (state, county, district, school, pre-school) has leaders and educators who are knowledgeable of and responsive to the strengths and needs of English learners and their communities and who utilize valid assessment and other data systems that inform instruction and continuous improvement. Each level of the system provides resources and tiered support to ensure strong programs and build the capacity of teachers and staff to leverage the strengths and meet the needs of English learners.

Principle Four: Alignment and Articulation Within and Across Systems

English learners experience a coherent, articulated, and aligned set of practices and pathways across grade levels and educational segments, beginning with a strong foundation in early childhood and appropriate identification of strengths and needs and continuing through to reclassification, graduation, higher education, and career opportunities. These pathways foster the skills, language(s), literacy, and knowledge students need for college- and career-readiness and participation in a global, diverse, multilingual, twenty-first-century world through Integrated ELD.

For additional information, visit the CDE English Learner Roadmap web page.

Sage Oak Charter Schools EL Population

Sage Oak Charter Schools serve a student population of ~~TK~~ Kindergarten through grade 12. Our English Learners make up approximately 2~~.2~~% of our student population. There are 13~~4~~ different languages spoken by Sage Oak EL students, with most of their ~~EL students~~' primary language being Spanish.

Responding to Diverse Learners

Identification of English Learner Students

Federal Law mandates that all students in K–12, upon first enrollment in a California public school, the Local Education Agency (LEA) uses a standardized procedure to determine a student's primary language.

Home Language Survey

This procedure begins with a home language survey (HLS), which is completed once by the parent or guardian at the time the student is initially enrolled in a California public school. The HLS is used as the primary screener to identify if the student uses a primary language other than English. If at least one of the first three questions on the HLS is answered with a language "other than English", the assessment process to determine English language fluency begins. If a language other than English is indicated on the fourth question only, then the student may be tested at the LEA's discretion. This process includes testing the student's English proficiency with the state-adopted English language proficiency assessment, English Language Proficiency Assessments for California (ELPAC). The initial assessment will be administered within thirty (30) calendar days of enrollment. In cases where parents/guardians answer 'English' to all questions on the HLS, but educators notice the student using another language, this student may be assessed on the initial ELPAC so the school provides the child's civil right to access education. Parents and school personnel should work collaboratively to identify if the child is or is not an English learner.

The HLS should not be readministered yearly or readministered if a student enrolls in a new LEA. If the HLS is completed in error, the parent or guardian may make a request to change it prior to the assessment. However, once a student is identified as an EL on the basis of the results of the Initial ELPAC and the student has been administered the Summative ELPAC, changing the HLS will not change the student's identification. While cumulative student records are in transit for a student transferring from another California School District, the California Longitudinal Pupil Achievement Data System (CALPADS) shall be used to determine whether a student has a history of being an

English Language Learner. If a student has a history of being an English Learner, the student will be given an annual Summative ELPAC assessment during the February 1st through May 31st test window.

ELPAC Assessment

For California's public school students, the English Language Proficiency Assessment for California (ELPAC) is the required state test for English Language Proficiency (ELP) that must be given to students whose primary language is not English, as determined by the HLS or teacher observation. State law (California Education Code [EC] sections 313 and 60810) and federal law (Titles I and III of the Every Student Succeeds Act [ESSA], the reauthorization of the Elementary and Secondary Education Act [ESEA]) require that LEAs administer a state test of English language proficiency (ELP) and develop an English Learner Progress Indicator (ELPI) for (1) newly enrolled students in grades K-12 whose primary language is not English, as an initial assessment; and (2) students who are English Learners (ELs)as a summative assessment. ELPAC results are not used to measure academic achievement. There is no opt-out option for the ELPAC for eligible students. State and federal laws require that all English learner students be assessed annually on the state English language proficiency assessment until reclassified as fluent English proficient.

Once tests are scored by the testing agency, individual student score reports (SSRs) are loaded directly to both the parent and student portals of the school's student information system from the Test Operation Management System. Once scores are received, parents will also be informed of test results within 30 calendar days from the first day of the current school year via email. If some or all SSRs are received after the last day of instruction for the school year, parents will receive the SSR within 15 working days at the start of the next school year. Parents/guardians are notified of results in writing in a language they can understand (or orally if they are unable to understand written communication). Parents will also be notified in any language of which 15% or more of the student population speaks in common. Additionally, each student's test results are uploaded to the charter's student information system~~, as well as recorded in our database, Ellevation,~~ and on the English Language Master Tracking Sheet. When a student withdraws from Sage Oak Charter School, a list of the student's test results will be printed from the student information system and included in the student's requested cume file.

Initial ELPAC Assessment

The Initial ELPAC aims to identify students who are ELs or are initial fluent English proficient (IFEP). All students in kindergarten through grade twelve (through twenty-one years of age)~~ (K–12), ages three through twenty- one~~, whose primary language is a language other than English must take the Initial ELPAC within 30 calendar days after they are first enrolled in a California public school or 60 calendar days prior to instruction, but not before July 1, per ELPAC regulations.

The Initial ELPAC window is from July 1st~~, 2025,~~ to June 30th~~, 2027~~6 of the current school year. The Initial ELPAC measures the ELP in the four language domains of listening, speaking, reading, and writing and identifies students as beginning either fluent in English (IFEP) or an English Learner (Intermediate or Novice).

The Initial Alternate ELPAC is administered as an initial assessment to newly enrolled students with the most significant cognitive disabilities whose IEP team determined they are eligible for alternate assessments and have a language other than English, as indicated on a home language survey

Initial ELPAC and Alternate Initial ELPAC Student Score Reports
The official score for the Initial ELPAC and the Alternate Initial ELPAC is produced once the LEA has entered and locked in the student's raw scores into the state assessment system. Individual student Initial ELPAC results include:

1. An Overall performance level and scale score which will indicate which of the three performance levels the student achieved: IFEP, Intermediate EL, and Novice EL.

   Initial Fluent English Proficient (IFEP)
   Students at this level have well-developed oral (listening and speaking) and written (reading and writing) skills. They can use English to learn and communicate in meaningful ways appropriate to different tasks, purposes, and audiences in various social and academic contexts.

   Intermediate English Learner
   Students at this level have somewhat developed to moderately developed oral (listening and speaking) and written (reading and writing) skills. This level captures a broad range of English learners, from those who can use English only to meet immediate communication needs to those who can, at times, use English to learn and communicate in meaningful ways on a range of topics and content areas.

   Novice English Learner
   Students at this level have minimally developed oral (listening and speaking) and written (reading and writing) English skills. They tend to rely on learned words and phrases to communicate meaning at a basic level. They need substantial-to-moderate linguistic support to communicate in familiar social and academic contexts. They need substantial linguistic support to communicate on less familiar tasks and topics.

2. A performance level for each composite tested (Oral and Written Language) is well-developed, somewhat to moderately developed, and minimally developed.

The initial ELPAC results are used to identify ELs who need to develop their listening, speaking, reading, and writing skills in English. This information, used with other local assessments, assists LEAs and schools when making placement decisions for new students who are identified as ELs. The initial ELPAC results are also used to identify students who are IFEP and are able to participate in the regular (core) academic program without further English language support. More information for families and staff can be found at https://www.caaspp-elpac.org or the California Department of Education: Parent Guides to Understanding at https://www.cde.ca.gov/ta/tg/ca/parentguidetounderstand.asp.

Summative ELPAC Assessment

The Summative ELPAC is given only to students who have previously been identified as English Learners based upon Initial ELPAC results. The Summative ELPAC is aligned with the 2012 California English Language Development Standards, measuring the English Language Proficiency (ELP) and how well a student is progressing with English development in each of the four domains: Listening, Speaking, Reading, and Writing.

The Summative Alternate ELPAC is a summative assessment for EL students with the most significant cognitive disabilities whose IEP team determined they are eligible for alternate assessments. This assessment must be administered annually to eligible students until they are reclassified as fluent English proficient.

This information is used to assist LEAs and schools in the ongoing process of program monitoring and evaluation. And to help determine if a student is ready to be reclassified. The Summative ELPAC and the Summative Alternate ELPAC must be given annually to students identified as ELs until they are reclassified to Fluent English Proficient (RFEP). The Summative ELPAC administration window is open from February 1 through May 31.

Summative ELPAC Student Score Reports

The official score for the Summative ELPAC is produced by the test contractor. The Summative ELPAC report includes the following information:

- An overall performance level and scale score
- A performance level and scale score for each composite tested (Oral and Written Language)
- A performance level for each domain tested (Listening, Speaking, Reading, and Writing)

Scale score ranges for each of the four performance levels are identified for Overall, Oral Language, and Written Language for all grades tested. These ranges incorporate the performance level cut scores approved by the State Board of Education (SBE). The Summative ELPAC Performance Level Descriptors are:

Level 4: Well Developed
English Learners at this level have well-developed oral (listening and speaking) and written (reading and writing) skills. They can use English to learn and communicate in meaningful ways appropriate to different tasks, purposes, and audiences in various social and academic contexts. They may need occasional linguistic support to engage in familiar social and academic contexts; they may need light support to communicate on less familiar tasks and topics. This test performance level corresponds to the upper range of the "Bridging" proficiency level as described in the 2012 California English Language Development Standards, Kindergarten Through Grade 12 (2012 CA ELD Standards).

Level 3: Moderately Developed
English Learners at this level have moderately developed oral (listening and speaking) and written (reading and writing) skills. They can sometimes use English to learn and communicate meaningfully in various topics and content areas. They need light-to-minimal linguistic support to engage in familiar social and academic contexts; they need moderate support to communicate on less familiar tasks and topics. This test performance level corresponds to the upper range of the "Expanding" proficiency level through the lower range of the "Bridging" proficiency level as described in the 2012 CA ELD Standards.

Level 2: Somewhat Developed
English Learners at this level have somewhat developed oral (listening and speaking) and written (reading and writing) skills. They can use English to meet immediate communication needs but often are not able to use English to learn and communicate on topics and content areas. They need moderate-to-light linguistic support to engage in familiar social and academic contexts; they need substantial-to-moderate support to communicate on less familiar tasks and topics. This test performance level corresponds to the low- to mid-range of the "Expanding" proficiency level as described in the 2012 CA ELD Standards.

Level 1: Minimally Developed
English Learners at this level have minimally developed oral (listening and speaking) and written (reading and writing) English skills. They tend to rely on learned words and phrases to communicate meaning at a basic level. They need substantial-to-moderate linguistic

support to communicate in familiar social and academic contexts and to communicate on less familiar tasks and topics. This test performance level corresponds to the "Emerging" proficiency level as described in the 2012 CA ELD Standards.

The Summative Alternate ELPAC Student Score Report

Level 3: Fluent English Proficient

English learners at this level have sufficient English language proficiency (ELP). They may need occasional linguistic support to enable them to access adapted grade-level content in English.

Level 2: Intermediate English Learner

English learners at this level have moderate ELP. They may need frequent linguistic support to enable them to access adapted grade-level content in English.

Level 1: Novice English Learner

English learners at this level have minimal ELP. They need substantial linguistic support to enable them to access adapted grade-level content in English.

Reclassification

California Education Code (EC) Section 313 and the California Code of Regulations (5CCR) Section 11308 require that each English Learner who 1) has demonstrated English language proficiency comparable to that of the average native English speaker and 2) who can participate effectively in a curriculum designed for pupils of the same age whose native language is English be Reclassified Fluent English Proficient (RFEP). Sage Oak Charter School recognizes the importance and irreversibility of this item and has established the following criteria and process to fully address this obligation. Once a student has demonstrated that he/she is ready to participate fully in all English instruction without special support services, the student is ready for reclassification.

Reclassification Criteria

Sage Oak Charter School uses the following criteria to reclassify EL students to RFEP status, as set forth in *EC* Section 313 and Title 5 *California of Regulations* (5 CCR) Section 11303:

1. Summative ELPAC Overall Score of 4 (score of 3 needed for the Summative Alternate ELPAC)
2. Teacher Evaluation by use of the Observation Protocol for Teachers of English Learners (OPTEL)
3. Parent Consultation by use of the OPTEL Parent Consultation Form
4. Evaluation of basic skills relative to the average performance of native English speakers of the same age, based on locally established empirical benchmarks.

Reclassification Process

Reclassification is the culmination of an EL student's participation in the program for English Learners and is conducted each year when the charter receives ELPAC score reports.

Based on the above reclassification criteria, if a student is deemed to qualify for reclassification, a letter will be drafted by the administration. The letter will include all data pertinent to the reclassification. Once the administration and the parent/guardian of the student have signed the form, the reclassification will take place. The language acquisition status of the student will be updated in the student information system, ~~Ellevation~~, on the EL Master Tracking Spreadsheet, and ultimately in the state reporting system (CALPADS). Additionally, all teachers associated with the student will be informed of the reclassification.

English Learners in Special Education

In accordance with the ED guidance issued in July 2014, the ED requires that all ELs with disabilities, or dually identified students, participate in the state's ELP assessment. Federal law requires that all ELs with disabilities participate in the state ELP assessment in the following ways, as determined by the IEP team:

- In the regular state ELP assessment without universal tools, designated supports, and accommodations
- In the regular state ELP assessment with universal tools, designated supports, and accommodations determined by the IEP team or Section 504 team
- In an alternate assessment aligned with the state's ELD standards, if the IEP team determines that the student is unable to participate in the regular ELP assessment with or without universal tools, designated supports, and accommodations.

Role of the IEP Team

The IEP team is an essential component in establishing the appropriate academic and functional goals, determining the specifically designed instructional program to meet the unique needs of all ELs with disabilities, and making decisions about how students can participate in the state ELP assessment. In accordance with the new ED guidance, the IEP team is responsible for:

- Making decisions about the content of a student's IEP, including whether a student must take a regular state assessment (in this case, the ELPAC assessment), with or without appropriate universal tools, designated supports and/or accommodations, or an alternate assessment in lieu of the regular ELPAC assessment (ED, July 2014, FAQ #4). Students with disabilities who cannot take one or more domains of the ELPAC with approved accessibility resources are eligible for a domain exemption. A domain exemption may be used if an English learner has a

disability that precludes assessment of the student in one or more domains of the English language proficiency assessment such that there are no appropriate accommodations for the affected domain(s). This use of a domain exemption(s) must be identified in the student's individualized educational program (IEP) or Section 504 plan. For a student to be assigned an Overall score, the student will need to be assessed in all domains to receive a student score report.

- Developing an IEP for each student with a disability, including each EL with a disability, at an IEP team meeting, which includes school officials and the child's parents/guardians. The Individuals with Disabilities Education Act (IDEA) regulation in the Code of Federal Regulations, Title 34, (34 CFR) Section 300.321(a) specifies the participants to be included on each child's IEP team. It is essential that IEP teams for ELs with disabilities include persons with expertise in English language acquisition. (ED, July 2014, FAQ #5).
- Ensuring that ELs' parents or guardians understand and are able to meaningfully participate in IEP team meetings at which the child's participation in the annual state ELP assessment is discussed. If a parent whose primary language is other than English is participating in IEP meetings, the IDEA regulations require each public agency to take whatever action necessary to ensure that the parent understands the proceedings of the IEP team meeting, including arranging for an interpreter (34 CFR Section 300.322[e]). When parents themselves are ELs, Title VI of the Civil Rights Act of 1964 also requires that the LEA effectively communicate with parents in a manner and form they can understand, such as by providing free interpretation and/or translation services (ED, July 2014, FAQ #6).

IEP teams will ensure that each English Learner receives appropriate services to develop English proficiency and have equitable access to the full curriculum. Each English Learner's IEP shall include linguistically appropriate goals and objectives based on the student's English proficiency level and the ELD standards. Such goals and objectives will fully address ELD and core content instruction. Each IEP shall also clearly delineate the person(s) and/or programs responsible for providing each instructional service. A parental exception waiver is not required for an English Learner whose IEP indicates that instructional services will be provided through an Alternative Program.

Special Education: Assessment

Students whose initial Home Language Survey indicates that a language other than English is spoken will be assessed on the ELPAC test within the first 30 days of school. ELPAC testing is considered to be one of the state's standardized tests; therefore, accommodations/modifications provided in the IEP for any standardized test will apply. SPED students with an existing EL classification will be assessed annually. If the IEP team determines that a student will participate in the California Alternate

Assessment (CAA), the team must also determine whether the student qualifies for the Alternate ELPAC.

Special Education: Classification

Students who are classified as English Learners MUST have their ELD needs addressed as part of their Individualized Education Program (IEP). Students who have been reclassified as Fluent English Proficient (RFEP) or who were initially identified as Initially Fluent English Proficient (IFEP) are *not* considered English Learners for the purpose of the IEP. Their progress is still monitored, but ELD does not need to be addressed on the IEP.

Special Education Reclassification for Dually Identified Students

In some cases, an IEP team may find that it is the disability that interferes with a dually identified student's ability to demonstrate English fluency due to Communication Disorders and/or Cognitive Disabilities. In these cases, the IEP team assesses student progress and considers reclassification of the student to RFEP status.

The IEP team may be designated to make reclassification decisions as long as team members utilize state reclassification criteria and apply those criteria to students with disabilities according to state guidelines. IEP teams may not modify Criterion 1 for reclassification, which requires meeting the SBE-adopted Overall PL 4 on the Summative ELPAC or PL 3 on the Summative Alternate ELPAC. This allows for all students to be held to a consistent and rigorous standard in demonstrating ELP in order to be exited from EL services.

Ideally, this should be done as early as possible, as soon as one to two summative test administrations, or as soon as there is reasonable evidence that it is a student's disability that prohibits English Language Acquisition.

If the recommendation for reclassification is taking place as part of the student's initial IEP or annual review, then the IEP Team Reclassification Determination Worksheet is to be completed, along with all other pages of the IEP to reflect the recommendation that the student is to be reclassified as RFEP (Reclassified Fluent English Proficient). If the recommendation for reclassification occurs between annual reviews, then in addition to completing the IEP Team Reclassification Determination Worksheet, an *IEP Amendment* meeting and form must also be completed. Because this is an IEP team recommendation, the parents, the EL Assessment Coordinator, and all applicable staff should be a part of the reclassification meeting and decision. If the team decides to reclassify the student as RFEP, the EL Assessment Coordinator will include a copy of the IEP Team Reclassification Determination Worksheet in the student's file. The EL Assessment Coordinator will then follow the

regular reclassification process to update the student's English Language Acquisition Status and notify all parties involved. If the reclassification is not agreed upon, the IEP team must ensure that the IEP continues to address the needs of the student who remains classified as an English learning student.

ELD Program Options

Personalized English Language Mainstream Program

English Learners in Sage Oak Charter Schools participate in an English Language Mainstream Program. This instructional program is designed to promote the acquisition of high levels of English language proficiency and access to the core curriculum. In the mainstream English program, English is the language of instruction for all subjects with no primary language support. Students in an English Language Mainstream Program will be supported by their instructors through the use of SDAIE strategies. Students may also be concurrently enrolled in an ELD support class. English Learners in the English Language Mainstream Program will receive ELD instruction until they are reclassified as English proficient. In the English Language Mainstream Program of Sage Oak Charter Schools:

- Core instruction in language arts, math, science, and social science is taught in English using charter-approved curriculum and SDAIE methodology
- English Language Learners receive both integrated and designated ELD instruction which addresses the ELD standards in listening, speaking, reading and writing.
- Teachers working with EL students will be appropriately authorized, i.e., CLAD or equivalent.

Parent Notification of Programs

All parents of English Learners, regardless of proficiency, must be notified at initial enrollment and annually, in writing, of program placement of their children and must also be provided with a description of our program, including educational materials used in this program and their entitlement to request a waiver. The information must be provided in a language the parents understand within 30 days of enrollment.

Staffing

Staffing Authorizations

Under the management of the Director of Human Resources, Sage Oak Charter Schools takes an active role in the recruitment and staffing of authorized personnel for all English Learner programs and makes it a priority to hire CLAD or equivalent teachers. Teachers providing instruction in a Mainstream English Program shall be authorized to provide appropriate core content and ELD instruction. This is achieved via a CLAD or equivalent authorization.

Teachers who are not currently authorized but who are working with English Learners, shall be required to sign a memorandum of understanding stipulating that they will be actively participating in professional development designed to secure appropriate authorization within two years. The HR Department will then monitor attendance at professional development activities to ensure that such teachers remain on track to complete the necessary training for their authorizations.

Access to Core Curriculum

All English learners are provided quality, standards-based, rigorous curriculum and instruction in all CORE content areas as well as Advanced Placement courses, enrichment classes, and college and career programs. Integrated ELD instruction and strategies are consistently implemented to meet the individual needs of each English learner.

Specially Designed Academic Instruction in English (SDAIE)
SDAIE is a methodology used to make subject area content, delivered in English, comprehensible in order to meet the needs of limited-English-proficient pupils. Academic instruction through English is modified to meet the student's level of language proficiency. Teachers use specialized strategies that enable students to understand, participate in, and access the core curriculum. (EC 44253.2[b]).

English as the Language of Instruction

In accordance with California Education Code Section 305, all students in California public schools, including those enrolled in independent study programs, must be taught in English for all core academic areas. This is to include, but not limited to, English Language Arts, Math, History, and Science. This requirement ensures that all students, including English Learners, receive equitable access to instruction that promotes English language proficiency and academic success.

To meet this requirement:

- Instruction in all subjects will be provided in English, including synchronous and asynchronous components of the independent study program.
- Participation in synchronous and/or asynchronous instruction for all core academic areas in English is mandatory for all English Learner students, regardless of their English Learner status or participation in an ELD program, as this is essential for meaningful interaction and mastery of academic content.
- Opting out of this instruction is not permitted, as it is integral to ensuring compliance with state law and the successful implementation of Sage Oak's academic program.

This policy ensures that Sage Oak Charter Schools uphold the legal and educational responsibilities to all students, fostering an environment where English language acquisition and academic achievement are prioritized.

English Language Development

English Language Development (ELD) Standards

Sage Oak's English Language Development program is grounded in research and aligned to the 2014 California State ELA/ELD Framework. The ELA/ELD Framework helps define how the California English Language Arts and English Language Development standards will be taught and assessed. Both sets of standards represent the skills, knowledge, and abilities English learners must possess in order to become 21st Century and College and Career Ready and describe what students should know and be able to do at each of the five levels of English proficiency. Sage Oak is committed to implementing the ELA/ELD Framework, the California State Standards, and English Language Development Standards through its adopted ELA/ELD programs. As stated in the ELA/ELD Framework Executive Summary: "The purpose of ELD instruction is to amplify (magnify and make clear) areas of English language development that are crucial for academic learning. The standards emphasize language learning as a social process and language itself as a complex and dynamic meaning-making resource. The standards help teachers support EL students to interact meaningfully with others and complex texts, engage in and learn through intellectually challenging tasks across the content areas, develop academic English, and develop awareness about how English works so that they can use it intentionally and purposefully."

The California ELD standards are organized into three parts.

Part 1: Interacting in Meaningful Ways
English learners participate in meaningful and intellectually challenging tasks in three ways:

- Collaboratively, by communicating with others about social and academic topics.
- Interpretively, by understanding written and spoken information.
- Productively, by writing or presenting to explain ideas and information.

Part II: Learning About How English Works
English learners comprehend and produce academic texts in various content areas.

- English learners use language to create organized texts, expand and enrich ideas, and connect and condense ideas.

Part III: Using Foundational Literacy Skills.
This section emphasizes how all teachers play a crucial role in developing the literacy of ELs.

- English learners at all grades require specialized instruction to learn foundational literacy skills based on their age, previous literacy, and educational experiences

The CA ELD Standards are aligned to the CA CCSS for ELA/Literacy as they magnify and make clear areas of English language development that are crucial for academic learning. The standards emphasize language learning as a social process and language itself as a complex and dynamic meaning-making resource. They promote the notion of supporting English Learners to develop awareness that different languages and variations of English exist and that their home languages and cultures are valuable resources in their own right and useful for building proficiency in English.

Key Themes of ELA/Literacy and ELD Instruction
Meaning Making
Meaning making is at the heart of ELA/literacy and ELD instruction. It is the central purpose for interacting with text, producing text, engaging in research, participating in discussion, and giving presentations. It is the reason for learning foundational skills and for expanding language. Meaning making includes literal understanding but is not confined to it at any grade or with any student. Inference making and critical reading, writing, and listening are given substantial and explicit attention in every discipline. Among the contributors to meaning making are language, knowledge, motivation, and, in the case of reading and writing, the ability to recognize printed words and use the alphabetic code to express ideas.

Language Development

Language is the cornerstone of literacy and learning. It is with and through language that students learn, think, and express information, ideas, perspectives, and questions. The strands of the CA CCSS for ELA/ Literacy—Reading, Writing, Speaking and Listening, and Language—all have language at the core, as do the parts of the CA ELD Standards—Interacting in Meaningful Ways, Learning About How English Works, and Using Foundational Literacy Skills. Students enrich their language as they read, write, speak, listen, interact, and learn about language. The foundational skills provide access to written language.

Effective Expression

Each strand of the CA CCSS for ELA/Literacy and each part of the CA ELD Standards includes attention to effective expression. Students learn to examine the author's craft as they read, analyzing how authors use language, text structure, and images to convey information, influence their readers, and evoke responses. Students learn to effectively express themselves as writers, discussion partners, and presenters, and they use digital media and visual displays to enhance their expression. They gain command over written and spoken English conventions, and they learn to communicate in ways appropriate for the context and task.

Content Knowledge

Content knowledge is a powerful contributor to the comprehension of text. It also undergirds the ability to write effective opinions/arguments, narratives, and explanatory/informational text, engage in meaningful discussions; and present ideas and information to others. It contributes significantly to language development, and it is fundamental to learning about how English works. Both sets of standards ensure that students can learn from informational texts and can share their knowledge as writers and speakers. An organized independent reading program contributes to knowledge. Content knowledge has a powerful reciprocal relationship with the development of literacy and language.

Foundational Skills

Acquisition of the foundational skills enables students to independently read and use written language to learn about the world and themselves, experience extraordinary and diverse works of literary fiction and nonfiction, and share their knowledge, ideas, stories, and perspectives with others. Students who know how to decode and develop automaticity with an increasing number of words are best positioned to make significant strides in meaning making, language development, effective expression, and content knowledge. At the same time, attention to those themes provides the very reason for learning about the alphabetic code and propels progress in the foundational skills.

Charter schools enrolling English Learners have a dual obligation, as do all LEAs, to provide a program for EL students designed to overcome language barriers and provide access to the core curriculum (Castañeda v. Pickard 648 F.2d 989, [5th Cir. 1981]). The CDE recognizes that both services, including classified ELD, must be an integral part of a comprehensive program for every English Learner.

The ability to read, write, and communicate with competence and confidence in English across a range of personal and academic contexts expands students' opportunities for career and college success, full and wise participation in a democratic society and global economy, and achievement of their personal aspirations. Moreover, literacy and language skills provide individuals with access to extraordinary and powerful literature that widens perspectives, illuminates the human experience, and deepens understandings of self and others.

Designated English Language Development

Sage Oak's English language development program is designed to support the academic success and reclassification of English learners. The teacher implements techniques, methodology, and supplemental curriculum designated to teach ELs explicitly about the English language, academic vocabulary, and develop their English language proficiency in all four language domains: speaking, listening, reading, and writing. Sage Oak Charter Schools will create a personalized ELD instruction pathway geared to the student's level of English proficiency.

Designated ELD instruction and individual academic support are provided to English learners during dedicated times each week. Students are grouped for designated ELD by their English language proficiency levels (Emerging, Expanding, Bridging). However, the three levels of language proficiency are not static but rather represent a continuum of language learning and decisions about grouping will be made in the student's best interest. Teachers use the student's production and interpretation of the English language to choose appropriate learning supports, inform instructional decisions, and keep track of academic progress.

Instructional Materials to Support the CA CCSS for ELA/Literacy and CA ELD Standards

The Designated ELD curriculum and materials were chosen specifically to address the varied cultural and language backgrounds our English learners possess, enabling learners and educators to celebrate their own cultures and everyday lived experiences while also learning about those of others. It includes authentic content from around the world to develop the student's understanding of different cultures and viewpoints of others around the globe.

The State Board of Education adopts instructional materials for use by students in kindergarten through grade eight. LEAs- school districts, charter schools, and county offices of education- ARE NOT required to purchase state-adopted instructional materials according to EC Section 60210(a). If an LEA chooses to use non-adopted materials, it has the responsibility to adopt materials that best meet the needs of its students and to conduct its own evaluation of instructional materials. The review must include a majority of classroom teachers from that content area or grade-level ED Section 60210(c). EC Section 60002 requires the LEA to promote the involvement of parents and other members of the community in the selection of instructional materials, in addition to teacher involvement.

Professional Learning

Professional Development

Sage Oak Charter Schools provides ongoing professional development opportunities to all teachers and staff working with English Learners. The goal of this training is to help educators acquire specific skills needed to work with English Learners in the areas of ELD instruction, comprehensible core content instruction, program designs, curriculum expectations, and processes and services for English Learners. Training should also focus on multiculturalism and up-to-date research and pedagogy for English Learners to receive equitable and accessible support and opportunities to achieve and reach their goals.

Staff development opportunities include, but are not limited to, the following:

- ELD Standards
- ELPAC assessment and identification levels
- ELD strategies and instruction
- SDAIE strategies and instruction
- Differentiated instruction
- ~~Ellevation Database Training~~
- Shared Best Practices

To ensure that all staff working with parents of EL students are appropriately trained, training participation and completion are documented.

Family & School Partnerships

Sage Oak Charter Schools seeks to promote positive collaboration between parents and the school by promoting open communication and developing a working partnership between parents and the schools to provide equal access to education for all students. Parents of English Learners (EL) are encouraged to participate in their children's education and be active in assisting their children in attaining English proficiency, achieving academically at high levels, and meeting state standards. Parents are given information about the English Learner Advisory Committee (ELAC) and are encouraged to participate.

English Learner Advisory Committee (ELAC)

An English Learner Advisory Committee is a school-level committee composed of parents, staff, and community members designated to advise school officials on English learner programs and services and is required for any California public school with 21 or more English Learners. The ELAC shall be responsible for the following tasks:

- Advising the principal and staff in the development of a site plan for English learners.
- Assisting in the development of the schoolwide needs assessment.
- Ways to make parents aware of the importance of regular school attendance.
- Assisting in the evaluation of the English Learner Master Plan.
- Each ELAC shall have the opportunity to select at least one member to the District English Learner Advisory Committee (DELAC). Districts with 31 or more ELACs may use a system of proportional or regional representation. Parents or guardians of English Learners shall constitute at least the same percentage of the ELAC membership as their children represent the student body. The parents or guardians of English Learners shall elect the parent members of ELAC. Parents or guardians of English Learners shall be provided the opportunity to vote in the election. ELAC members shall receive training materials and training that will assist them in carrying out their required advisory responsibilities. Training shall be planned in full consultation with committee members, and funds from appropriate resources may be used to meet the costs of providing the training including costs associated with the attendance of members at training sessions. ELAC meeting agendas will be posted on the school website.

ELAC Membership

All parents/guardians of ELs and recently RFEPed students (within the academic school year) have an opportunity to participate as members of the committee. Members receive training and materials to assist members in carrying out their legal responsibilities in alignment with California

Education Code, sections 35147, 52176(b) and (c), 62002.5, and 64001(a) and California Code of Regulations, Title 5, Section 11308.

The ELAC is composed of the following:

- Principal or designee
- Parents of EL and students redesignated (RFEP) within the academic school year.
- School staff

Assessment and Student Program Monitoring

Accountability and Evaluation

California has been working for the past several years to improve education at the state level. The goal is to increase the academic achievement of all students by creating a coordinated system through the use of content and performance standards. In response to statewide accountability reform, Sage Oak Charter Schools provides clearly defined standards and expectations for student learning. It has a primary goal that all students will meet the charter's academic content and performance standards.

Through the Sage Oak Charter Schools assessment program, the assessment and accountability department carefully considers what students are asked to do, how student performance is evaluated, and how evaluation results are used. The assessment program is responsive to the developmental differences, linguistic differences, and special needs of English Learners. Through multiple forms of assessment, Sage Oak Charter Schools is able to determine to what degree English Learners are achieving English proficiency and meeting academic achievement goals.

Sage Oak Charter Schools' assessment practices with respect to English Learners are designed to:

- Assess and monitor language development by time in the program
- Assess academic achievement in meeting grade level core standards
- Assess progress of ELs achieving ELD grade level standards
- Ensure learning opportunities in reading and writing are provided
- Monitor that targeted interventions are working

Assessment data is compiled, analyzed and reported by Sage Oak Charter Schools leads and Data and Assessment Department. Their reports are then analyzed by the school leadership team, to produce a set of suggested program modifications, which are then shared with the Board of Directors, teachers, and EL parents for additional input and approval.

Sage Oak Charter Schools annually determines the number and percentage of EL students who have become RFEP through ongoing uploads of information to CALPADS. CALPADS reports the actual count of EL, IFEP, and RFEP students during the calendar year as well as the number of teachers providing and authorized to provide appropriate instruction for English Learners.

Monitoring of Long-Term English Learners

Long-term English Learners (LTEL) are defined as students who are in grades 6 to 12, have been enrolled in U.S. schools for more than six years, have remained at the same level of English for two or more years as measured by the state's annual proficiency exam, and have scored "standard not met" or "standard nearly met" on the CAASPP ELA assessment.

ELs with little or no English proficiency need more time than native-English speakers to meet grade-level benchmarks in English and state-mandated testing targets. Schools must monitor student progress to ensure that additional and appropriate learning opportunities are provided in English language development and in reading, writing, and other academic content areas in order to close the achievement gap.

Benchmark assessments, course grades, and the CAASPP assessments, along with the number of years a student has been classified as an EL student, are used to determine if a student is making the appropriate movement toward becoming RFEP.

If, despite the implementation of school-wide interventions and supports, a student is still not making “adequate progress,” the school will hold a Student Study Team meeting to discuss the lack of progress. The SST team will plan further evaluation and intervention to support students who are not meeting interim benchmarks. Interventions will be noted and filed on the EL Master Tracking Spreadsheet, in their cumulative folder, and/or in a collaborative Google document. Additionally, parents will be notified annually if their student is at risk of becoming an LTEL or has been classified as an LTEL.

Meeting the Needs of Long-Term English Learners

The National Education Association’s Publication: Meeting the Unique Needs of Long-Term English Language Learners, A Guide for Educators provides valuable research-based information and best practices to guide schools and LEAs in supporting students at risk for becoming Long Term English Learners (LTEL).

Elementary School Strategies and Programs that Prevent the Creation of Long-Term English Language Learners:

The trajectory of a Long Term English Language Learner begins in elementary school. Taking the necessary steps early enough can help prevent an entire new generation of long-term ELL students. Successful elementary school programs offer high-quality language development programs and strategies that are consistent across grade levels.

- English Language Development/English as a Second Language: Dedicated, daily, and standards-based ELD/ESL programs address the specific needs of students at each fluency level and support instruction with quality materials that focus on all four language domains—with a major emphasis on building a strong oral language foundation; using language for interaction and meaning-making; and developing complex, precise, and academic language.
- Home language development: Programs that develop students' home language (oral and literacy) to threshold levels are a strong foundation for developing English literacy and academic success (at least through third grade, more powerfully through fifth grade, and optimally, ongoing throughout a student's education). Teaching students to read in their first language promotes higher levels of reading achievement in English and provides students with the benefits of bilingualism.
- Use curriculum, instruction, and strategies. Use resources that promote transfer between English and the home language.
- Enriched oral language development: Emphasize oral language throughout the curriculum.
- Modified instructional strategies and supplemental materials provide access to academic content.
- Program coherence and consistency: Provide coherence and consistency of program across grades, including, wherever possible, articulation and alignment with preschool.
- High-quality literature: Provide students/LTELs with exposure to high-quality literature and complex and expressive language.

Seven Basic Principles for Meeting the Needs of Middle and High School LTELs

Seven basic principles lie at the heart of successfully educating middle and high school Long Term English Language Learners:

1. Urgency: Focus urgently on accelerating LTEL progress towards attaining English proficiency and closing academic gaps.
2. Distinct needs: Recognize that the needs of LTELs are distinct and cannot adequately be addressed within a "struggling reader" paradigm or a generic "English Language Learner" approach, but require an explicit LTEL approach.

3. Language, literacy, and academics: Provide LTELs with language development, literacy development, and a program that addresses the academic gaps they have accrued.
4. Home language: Affirm the crucial role of home language in a student's life and learning, and provide home language development whenever possible.
5. Three R's: rigor, relevance, and relationships: Provide LTELs with rigorous and relevant curriculum and relationships with supportive adults (along with the supports to succeed).
6. Integration: End the ESL ghetto, cease the sink-or-swim approach, and provide maximum integration without sacrificing access to LTEL supports.
7. Active engagement: Invite, support, and insist that LTELs become active participants in their own education.

Instructional Support System

The Charter School is committed to closing the achievement gap for all students, including English Learners. The Instructional Support System for English Learners is a part of the standards-based system of instruction, assessment, monitoring, and evaluation provided for all students.

The Instructional Support System for English Learners is designed to provide the mechanisms for recording EL achievement, detecting academic deficits, and monitoring the effectiveness of interventions.

To ensure all students will catch up to their grade-level peers, we have the following essential elements:

1. All English Learners are held to the same Charter-adopted curriculum and performance standards in the core curricular areas as all other students.
2. All English Learners participate in a program of curriculum and instruction that is aligned to state content standards and designed to reduce all language barriers. The English Learner program is designed to ensure that participating EL students acquire English and learn grade-level academic content simultaneously and to the greatest extent possible. Components of this program include ELD, grade-level core curriculum, and assessment.
3. The Instructional Support System for English Learners includes an assessment and reporting process of student academic achievement for all students, including English Learners. The use of multiple measures, the disaggregating of student achievement data, and the regular reporting of student achievement data are integral components of the Charter assessment and reporting process. ~~and are recorded in the Ellevation platform.~~
4. The performance of EL and RFEP students is monitored:

a. Students identified in need of interventions are provided the appropriate intervention aimed at filling in gaps in content knowledge so that ELs can gain full access to grade-level core content instruction in a reasonable period of time.
b. Any areas of deficiency are noted, and appropriate modifications in instructional programs or student support systems are identified.

The Instructional Support System described here for ELs is based on five (5) essential elements that include adopted curriculum standards; curriculum and instruction aligned with adopted standards; assessment and reporting; charter and site level monitoring and intervention; and program evaluation.

1. Adopted Curriculum Standards: In Sage Oak Charter Schools each English Learner is held to the same charter-adopted curriculum standards in the core curricular areas of English Language Arts, math, history-social science, and science as every other charter student. In addition, each EL student is expected to demonstrate mastery of the adopted ELD standards.
2. Curriculum and Instruction Aligned with Adopted Standards: Sage Oak Charter Schools supports each English Learner in his/her appropriate level of language development in the core courses. Each English Learner participates in an instructional program with state-adopted materials that are aligned with charter and state standards. Through articulation meetings, staff members discuss and interpret data on English Learner students to address the issues surrounding English Learners who may have been in the educational system for some time and seem unable to move beyond this level.
3. Assessment and Reporting: Sage Oak Charter Schools administers all state-mandated examinations. ELPAC assessments and ongoing multiple measures are used to assess student proficiency. Results are entered into the EL Master Tracking Spreadsheet for instructional planning and monitoring. Overall, student results are shared with the CEO and governing board.
4. Monitoring and Intervention: English Learner's assessment results are recorded on the EL Master Tracking Spreadsheet. The results are monitored to evaluate student learning in order to inform instruction and provide interventions as needed. When, according to ongoing assessments, students cannot meet interim expectations in academic content, they shall be referred by teachers and parents to receive academic interventions and support that enable them to overcome any academic deficits before they become irreparable. The intervention itself will directly target the identified academic need. Delivery of the intervention shall be monitored and documented. The effectiveness of the intervention will then be determined based on student work and assessments.
5. Program Evaluation: Sage Oak will conduct periodic evaluations of the effectiveness of its ELL program to determine if any modifications or improvements are required. This evaluation will

include looking at the implementation of the ELL program, the effectiveness of the ELL program in meeting its goals for students (English language development and the ability to participate meaningfully in the educational program), and gathering appropriate input from knowledgeable persons and other stakeholders.

Note: When Special Education students, identified as ELs, are not making adequate progress, Special Education teachers must schedule an IEP meeting to discuss further interventions.

Monitoring of Reclassified Students

The school's Lead, teachers, parents, and the assessment Lead supervise the process of monitoring reclassified students. School staff will use the Smarter Balanced assessment, local multiple measure scores, and teacher assessments and observations to semi-annually monitor the progress of RFEP students for a period no less than four (4) years after reclassification. Student performance shall be reviewed at each progress reporting period. Those students found to be regressing in their academic performance will be referred to receive an academic intervention in the specific area of need. ~~This monitoring of RFEP students is recorded in the Ellevation platform.~~

Sage Oak Charter Schools

English Learner Master Plan

2026-2027

Presented by: Sage Oak Charter Schools

Board Approved June 11, 2026

Commitment and Purpose

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.

Goals and Objectives

The Sage Oak English Learner Master Plan serves as a guide and gives an overview of the programs and resources provided for our English learners. The plan is centered around our vision, core beliefs, and goals for all students in our schools and affirms our commitment to each English learner as an individual by honoring their diversity and accelerating their English language proficiency while preparing them for the rigors of college, future careers, and becoming a productive and engaged global citizen.

The English Learner Master Plan provides a clear statement of policies related to the development, implementation, and evaluation of English learner programs and services that are required by all state and federal guidelines. These policies are based on current resources and initiatives related to the 2012 CA ELD Standards, the 2014 English Language Arts (ELA)/English Language Development (ELD) Framework and the California English Learner Roadmap and are in place in order to:

- Ensure that English learners will achieve English language proficiency as quickly as possible.
- Support the academic success of English learners by consistently providing high-quality services designed to meet their academic and linguistic needs.
- Develop cross-cultural awareness and appreciation of one's own culture and language, encourage bilingualism, and enhance the positive self-esteem of English learners.
- Embrace and encourage parent and community involvement in meeting the needs of English learners.
- Provide staff and parent training in the implementation of effective instructional programs and teaching strategies for English learners.
- Providing a process for monitoring the effectiveness of the program.

Guiding Principles of the California English Learner Roadmap

The California English Learner Roadmap will guide Sage Oak to continuous improvement of the EL program over time. The Roadmap emphasizes four principles and approaches to teaching and learning that result in a more powerful, twenty-first-century education for all English learners.

Principle One: Assets-Oriented and Needs-Responsive Schools

Pre-schools and schools are responsive to different English learner (EL) strengths, needs, and identities and support the socio-emotional health and development of English learners. Programs value and build upon the cultural and linguistic assets students bring to their education in safe and affirming school climates. Educators value and build strong family, community, and school partnerships.

Principle Two: Intellectual Quality of Instruction and Meaningful Access

English learners engage in intellectually rich, developmentally appropriate learning experiences that foster high levels of English proficiency. These experiences integrate language development, literacy, and content learning, as well as provide access for comprehension and participation through native language instruction and scaffolding. English learners have meaningful access to a full standards-based and relevant curriculum and the opportunity to develop proficiency in English and other languages.

Principle Three: System Conditions that Support Effectiveness

Each level of the school system (state, county, district, school, pre-school) has leaders and educators who are knowledgeable of and responsive to the strengths and needs of English learners and their communities and who utilize valid assessment and other data systems that inform instruction and continuous improvement. Each level of the system provides resources and tiered support to ensure strong programs and build the capacity of teachers and staff to leverage the strengths and meet the needs of English learners.

Principle Four: Alignment and Articulation Within and Across Systems

English learners experience a coherent, articulated, and aligned set of practices and pathways across grade levels and educational segments, beginning with a strong foundation in early childhood and appropriate identification of strengths and needs and continuing through to reclassification, graduation, higher education, and career opportunities. These pathways foster the skills, language(s), literacy, and knowledge students need for college- and career-readiness and participation in a global, diverse, multilingual, twenty-first-century world through Integrated ELD.

For additional information, visit the CDE English Learner Roadmap web page.

Sage Oak Charter Schools EL Population

Sage Oak Charter Schools serve a student population of Kindergarten through grade 12. Our English Learners make up approximately 2% of our student population. There are 13 different languages spoken by Sage Oak EL students, with most of their primary language being Spanish.

Responding to Diverse Learners

Identification of English Learner Students

Federal Law mandates that all students in K–12, upon first enrollment in a California public school, the Local Education Agency (LEA) uses a standardized procedure to determine a student's primary language.

Home Language Survey

This procedure begins with a home language survey (HLS), which is completed once by the parent or guardian at the time the student is initially enrolled in a California public school. The HLS is used as the primary screener to identify if the student uses a primary language other than English. If at least one of the first three questions on the HLS is answered with a language "other than English", the assessment process to determine English language fluency begins. If a language other than English is indicated on the fourth question only, then the student may be tested at the LEA's discretion. This process includes testing the student's English proficiency with the state-adopted English language proficiency assessment, English Language Proficiency Assessments for California (ELPAC). The initial assessment will be administered within thirty (30) calendar days of enrollment. In cases where parents/guardians answer 'English' to all questions on the HLS, but educators notice the student using another language, this student may be assessed on the initial ELPAC so the school provides the child's civil right to access education. Parents and school personnel should work collaboratively to identify if the child is or is not an English learner.

The HLS should not be readministered yearly or readministered if a student enrolls in a new LEA. If the HLS is completed in error, the parent or guardian may make a request to change it prior to the assessment. However, once a student is identified as an EL on the basis of the results of the Initial ELPAC and the student has been administered the Summative ELPAC, changing the HLS will not change the student's identification. While cumulative student records are in transit for a student transferring from another California School District, the California Longitudinal Pupil Achievement Data System (CALPADS) shall be used to determine whether a student has a history of being an English Language Learner. If a student has a history of being an English Learner, the student will be given an annual Summative ELPAC assessment during the February 1st through May 31st test window.

ELPAC Assessment

For California's public school students, the English Language Proficiency Assessment for California (ELPAC) is the required state test for English Language Proficiency (ELP) that must be given to students whose primary language is not English, as determined by the HLS or teacher observation. State law (California Education Code [EC] sections 313 and 60810) and federal law (Titles I and III of the Every Student Succeeds Act [ESSA], the reauthorization of the Elementary and Secondary Education Act [ESEA]) require that LEAs administer a state test of English language proficiency (ELP) and develop an English Learner Progress Indicator (ELPI) for (1) newly enrolled students in grades K-12 whose primary language is not English, as an initial assessment; and (2) students who are English Learners (ELs)as a summative assessment. ELPAC results are not used to measure academic achievement. There is no opt-out option for the ELPAC for eligible students. State and federal laws require that all English learner students be assessed annually on the state English language proficiency assessment until reclassified as fluent English proficient.

Once tests are scored by the testing agency, individual student score reports (SSRs) are loaded directly to both the parent and student portals of the school's student information system from the Test Operation Management System. Once scores are received, parents will also be informed of test results within 30 calendar days from the first day of the current school year via email. If some or all SSRs are received after the last day of instruction for the school year, parents will receive the SSR within 15 working days at the start of the next school year. Parents/guardians are notified of results in writing in a language they can understand (or orally if they are unable to understand written communication). Parents will also be notified in any language of which 15% or more of the student population speaks in common. Additionally, each student's test results are uploaded to the charter's student information system and on the English Language Master Tracking Sheet. When a student withdraws from Sage Oak Charter School, a list of the student's test results will be printed from the student information system and included in the student's requested cume file.

Initial ELPAC Assessment

The Initial ELPAC aims to identify students who are ELs or are initial fluent English proficient (IFEP). All students in kindergarten through grade twelve (through twenty-one years of age), whose primary language is a language other than English must take the Initial ELPAC within 30 calendar days after they are first enrolled in a California public school or 60 calendar days prior to instruction, but not before July 1, per ELPAC regulations.

The Initial ELPAC window is from July 1st to June 30th, of the current school year. The Initial ELPAC measures the ELP in the four language domains of listening, speaking, reading, and writing and

identifies students as beginning either fluent in English (IFEP) or an English Learner (Intermediate or Novice).

The Initial Alternate ELPAC is administered as an initial assessment to newly enrolled students with the most significant cognitive disabilities whose IEP team determined they are eligible for alternate assessments and have a language other than English, as indicated on a home language survey

Initial ELPAC and Alternate Initial ELPAC Student Score Reports

The official score for the Initial ELPAC and the Alternate Initial ELPAC is produced once the LEA has entered and locked in the student's raw scores into the state assessment system. Individual student Initial ELPAC results include:

1. An Overall performance level and scale score which will indicate which of the three performance levels the student achieved: IFEP, Intermediate EL, and Novice EL.

   Initial Fluent English Proficient (IFEP)
   Students at this level have well-developed oral (listening and speaking) and written (reading and writing) skills. They can use English to learn and communicate in meaningful ways appropriate to different tasks, purposes, and audiences in various social and academic contexts.

   Intermediate English Learner
   Students at this level have somewhat developed to moderately developed oral (listening and speaking) and written (reading and writing) skills. This level captures a broad range of English learners, from those who can use English only to meet immediate communication needs to those who can, at times, use English to learn and communicate in meaningful ways on a range of topics and content areas.

   Novice English Learner
   Students at this level have minimally developed oral (listening and speaking) and written (reading and writing) English skills. They tend to rely on learned words and phrases to communicate meaning at a basic level. They need substantial-to-moderate linguistic support to communicate in familiar social and academic contexts. They need substantial linguistic support to communicate on less familiar tasks and topics.

2. A performance level for each composite tested (Oral and Written Language) is well-developed, somewhat to moderately developed, and minimally developed.

The initial ELPAC results are used to identify ELs who need to develop their listening, speaking, reading, and writing skills in English. This information, used with other local assessments, assists LEAs and schools when making placement decisions for new students who are identified as ELs. The initial ELPAC results are also used to identify students who are IFEP and are able to participate in the regular (core) academic program without further English language support. More information for families and staff can be found at https://www.caaspp-elpac.org or the California Department of Education: Parent Guides to Understanding at https://www.cde.ca.gov/ta/tg/ca/parentguidetounderstand.asp.

Summative ELPAC Assessment

The Summative ELPAC is given only to students who have previously been identified as English Learners based upon Initial ELPAC results. The Summative ELPAC is aligned with the 2012 California English Language Development Standards, measuring the English Language Proficiency (ELP) and how well a student is progressing with English development in each of the four domains: Listening, Speaking, Reading, and Writing.

The Summative Alternate ELPAC is a summative assessment for EL students with the most significant cognitive disabilities whose IEP team determined they are eligible for alternate assessments. This assessment must be administered annually to eligible students until they are reclassified as fluent English proficient.

This information is used to assist LEAs and schools in the ongoing process of program monitoring and evaluation. And to help determine if a student is ready to be reclassified. The Summative ELPAC and the Summative Alternate ELPAC must be given annually to students identified as ELs until they are reclassified to Fluent English Proficient (RFEP). The Summative ELPAC administration window is open from February 1 through May 31.

Summative ELPAC Student Score Reports

The official score for the Summative ELPAC is produced by the test contractor. The Summative ELPAC report includes the following information:

- An overall performance level and scale score
- A performance level and scale score for each composite tested (Oral and Written Language)
- A performance level for each domain tested (Listening, Speaking, Reading, and Writing)

Scale score ranges for each of the four performance levels are identified for Overall, Oral Language, and Written Language for all grades tested. These ranges incorporate the performance level cut

scores approved by the State Board of Education (SBE). The Summative ELPAC Performance Level Descriptors are:

Level 4: Well Developed
English Learners at this level have well-developed oral (listening and speaking) and written (reading and writing) skills. They can use English to learn and communicate in meaningful ways appropriate to different tasks, purposes, and audiences in various social and academic contexts. They may need occasional linguistic support to engage in familiar social and academic contexts; they may need light support to communicate on less familiar tasks and topics. This test performance level corresponds to the upper range of the "Bridging" proficiency level as described in the 2012 California English Language Development Standards, Kindergarten Through Grade 12 (2012 CA ELD Standards).

Level 3: Moderately Developed
English Learners at this level have moderately developed oral (listening and speaking) and written (reading and writing) skills. They can sometimes use English to learn and communicate meaningfully in various topics and content areas. They need light-to-minimal linguistic support to engage in familiar social and academic contexts; they need moderate support to communicate on less familiar tasks and topics. This test performance level corresponds to the upper range of the "Expanding" proficiency level through the lower range of the "Bridging" proficiency level as described in the 2012 CA ELD Standards.

Level 2: Somewhat Developed
English Learners at this level have somewhat developed oral (listening and speaking) and written (reading and writing) skills. They can use English to meet immediate communication needs but often are not able to use English to learn and communicate on topics and content areas. They need moderate-to-light linguistic support to engage in familiar social and academic contexts; they need substantial-to-moderate support to communicate on less familiar tasks and topics. This test performance level corresponds to the low- to mid-range of the "Expanding" proficiency level as described in the 2012 CA ELD Standards.

Level 1: Minimally Developed
English Learners at this level have minimally developed oral (listening and speaking) and written (reading and writing) English skills. They tend to rely on learned words and phrases to communicate meaning at a basic level. They need substantial-to-moderate linguistic support to communicate in familiar social and academic contexts and to communicate on

less familiar tasks and topics. This test performance level corresponds to the "Emerging" proficiency level as described in the 2012 CA ELD Standards.

The Summative Alternate ELPAC Student Score Report

Level 3: Fluent English Proficient

English learners at this level have sufficient English language proficiency (ELP). They may need occasional linguistic support to enable them to access adapted grade-level content in English.

Level 2: Intermediate English Learner

English learners at this level have moderate ELP. They may need frequent linguistic support to enable them to access adapted grade-level content in English.

Level 1: Novice English Learner

English learners at this level have minimal ELP. They need substantial linguistic support to enable them to access adapted grade-level content in English.

Reclassification

California Education Code (EC) Section 313 and the California Code of Regulations (5CCR) Section 11308 require that each English Learner who 1) has demonstrated English language proficiency comparable to that of the average native English speaker and 2) who can participate effectively in a curriculum designed for pupils of the same age whose native language is English be Reclassified Fluent English Proficient (RFEP). Sage Oak Charter School recognizes the importance and irreversibility of this item and has established the following criteria and process to fully address this obligation. Once a student has demonstrated that he/she is ready to participate fully in all English instruction without special support services, the student is ready for reclassification.

Reclassification Criteria

Sage Oak Charter School uses the following criteria to reclassify EL students to RFEP status, as set forth in *EC* Section 313 and Title 5 *California of Regulations* (5 CCR) Section 11303:

1. Summative ELPAC Overall Score of 4 (score of 3 needed for the Summative Alternate ELPAC)
2. Teacher Evaluation by use of the Observation Protocol for Teachers of English Learners (OPTEL)
3. Parent Consultation by use of the OPTEL Parent Consultation Form
4. Evaluation of basic skills relative to the average performance of native English speakers of the same age, based on locally established empirical benchmarks.

Reclassification Process

Reclassification is the culmination of an EL student's participation in the program for English Learners and is conducted each year when the charter receives ELPAC score reports.

Based on the above reclassification criteria, if a student is deemed to qualify for reclassification, a letter will be drafted by the administration. The letter will include all data pertinent to the reclassification. Once the administration and the parent/guardian of the student have signed the form, the reclassification will take place. The language acquisition status of the student will be updated in the student information system, on the EL Master Tracking Spreadsheet, and ultimately in the state reporting system (CALPADS). Additionally, all teachers associated with the student will be informed of the reclassification.

English Learners in Special Education

In accordance with the ED guidance issued in July 2014, the ED requires that all ELs with disabilities, or dually identified students, participate in the state's ELP assessment. Federal law requires that all ELs with disabilities participate in the state ELP assessment in the following ways, as determined by the IEP team:

- In the regular state ELP assessment without universal tools, designated supports, and accommodations
- In the regular state ELP assessment with universal tools, designated supports, and accommodations determined by the IEP team or Section 504 team
- In an alternate assessment aligned with the state's ELD standards, if the IEP team determines that the student is unable to participate in the regular ELP assessment with or without universal tools, designated supports, and accommodations.

Role of the IEP Team

The IEP team is an essential component in establishing the appropriate academic and functional goals, determining the specifically designed instructional program to meet the unique needs of all ELs with disabilities, and making decisions about how students can participate in the state ELP assessment. In accordance with the new ED guidance, the IEP team is responsible for:

- Making decisions about the content of a student's IEP, including whether a student must take a regular state assessment (in this case, the ELPAC assessment), with or without appropriate universal tools, designated supports and/or accommodations, or an alternate assessment in lieu of the regular ELPAC assessment (ED, July 2014, FAQ #4). Students with disabilities who cannot take one or more domains of the ELPAC with approved accessibility resources are eligible for a domain exemption. A domain exemption may be used if an English learner has a disability that precludes assessment of the student in one or more domains of the English

language proficiency assessment such that there are no appropriate accommodations for the affected domain(s). This use of a domain exemption(s) must be identified in the student's individualized educational program (IEP) or Section 504 plan. For a student to be assigned an Overall score, the student will need to be assessed in all domains to receive a student score report.

- Developing an IEP for each student with a disability, including each EL with a disability, at an IEP team meeting, which includes school officials and the child's parents/guardians. The Individuals with Disabilities Education Act (IDEA) regulation in the Code of Federal Regulations, Title 34, (34 CFR) Section 300.321(a) specifies the participants to be included on each child's IEP team. It is essential that IEP teams for ELs with disabilities include persons with expertise in English language acquisition. (ED, July 2014, FAQ #5).
- Ensuring that ELs' parents or guardians understand and are able to meaningfully participate in IEP team meetings at which the child's participation in the annual state ELP assessment is discussed. If a parent whose primary language is other than English is participating in IEP meetings, the IDEA regulations require each public agency to take whatever action necessary to ensure that the parent understands the proceedings of the IEP team meeting, including arranging for an interpreter (34 CFR Section 300.322[e]). When parents themselves are ELs, Title VI of the Civil Rights Act of 1964 also requires that the LEA effectively communicate with parents in a manner and form they can understand, such as by providing free interpretation and/or translation services (ED, July 2014, FAQ #6).

IEP teams will ensure that each English Learner receives appropriate services to develop English proficiency and have equitable access to the full curriculum. Each English Learner's IEP shall include linguistically appropriate goals and objectives based on the student's English proficiency level and the ELD standards. Such goals and objectives will fully address ELD and core content instruction. Each IEP shall also clearly delineate the person(s) and/or programs responsible for providing each instructional service. A parental exception waiver is not required for an English Learner whose IEP indicates that instructional services will be provided through an Alternative Program.

Special Education: Assessment

Students whose initial Home Language Survey indicates that a language other than English is spoken will be assessed on the ELPAC test within the first 30 days of school. ELPAC testing is considered to be one of the state's standardized tests; therefore, accommodations/modifications provided in the IEP for any standardized test will apply. SPED students with an existing EL classification will be assessed annually. If the IEP team determines that a student will participate in the California Alternate Assessment (CAA), the team must also determine whether the student qualifies for the Alternate ELPAC.

Special Education: Classification

Students who are classified as English Learners MUST have their ELD needs addressed as part of their Individualized Education Program (IEP). Students who have been reclassified as Fluent English Proficient (RFEP) or who were initially identified as Initially Fluent English Proficient (IFEP) are *not* considered English Learners for the purpose of the IEP. Their progress is still monitored, but ELD does not need to be addressed on the IEP.

Special Education Reclassification for Dually Identified Students

In some cases, an IEP team may find that it is the disability that interferes with a dually identified student's ability to demonstrate English fluency due to Communication Disorders and/or Cognitive Disabilities. In these cases, the IEP team assesses student progress and considers reclassification of the student to RFEP status.

The IEP team may be designated to make reclassification decisions as long as team members utilize state reclassification criteria and apply those criteria to students with disabilities according to state guidelines. IEP teams may not modify Criterion 1 for reclassification, which requires meeting the SBE-adopted Overall PL 4 on the Summative ELPAC or PL 3 on the Summative Alternate ELPAC. This allows for all students to be held to a consistent and rigorous standard in demonstrating ELP in order to be exited from EL services.

Ideally, this should be done as early as possible, as soon as one to two summative test administrations, or as soon as there is reasonable evidence that it is a student's disability that prohibits English Language Acquisition.

If the recommendation for reclassification is taking place as part of the student's initial IEP or annual review, then the IEP Team Reclassification Determination Worksheet is to be completed, along with all other pages of the IEP to reflect the recommendation that the student is to be reclassified as RFEP (Reclassified Fluent English Proficient). If the recommendation for reclassification occurs between annual reviews, then in addition to completing the IEP Team Reclassification Determination Worksheet, an *IEP Amendment* meeting and form must also be completed. Because this is an IEP team recommendation, the parents, the EL Assessment Coordinator, and all applicable staff should be a part of the reclassification meeting and decision. If the team decides to reclassify the student as RFEP, the EL Assessment Coordinator will include a copy of the IEP Team Reclassification Determination Worksheet in the student's file. The EL Assessment Coordinator will then follow the regular reclassification process to update the student's English Language Acquisition Status and notify all parties involved. If the reclassification is not agreed upon, the IEP team must ensure that the

IEP continues to address the needs of the student who remains classified as an English learning student.

ELD Program Options

Personalized English Language Mainstream Program

English Learners in Sage Oak Charter Schools participate in an English Language Mainstream Program. This instructional program is designed to promote the acquisition of high levels of English language proficiency and access to the core curriculum. In the mainstream English program, English is the language of instruction for all subjects with no primary language support. Students in an English Language Mainstream Program will be supported by their instructors through the use of SDAIE strategies. Students may also be concurrently enrolled in an ELD support class. English Learners in the English Language Mainstream Program will receive ELD instruction until they are reclassified as English proficient. In the English Language Mainstream Program of Sage Oak Charter Schools:

- Core instruction in language arts, math, science, and social science is taught in English using charter-approved curriculum and SDAIE methodology
- English Language Learners receive both integrated and designated ELD instruction which addresses the ELD standards in listening, speaking, reading and writing.
- Teachers working with EL students will be appropriately authorized, i.e., CLAD or equivalent.

Parent Notification of Programs

All parents of English Learners, regardless of proficiency, must be notified at initial enrollment and annually, in writing, of program placement of their children and must also be provided with a description of our program, including educational materials used in this program and their entitlement to request a waiver. The information must be provided in a language the parents understand within 30 days of enrollment.

Staffing

Staffing Authorizations

Under the management of the Director of Human Resources, Sage Oak Charter Schools takes an active role in the recruitment and staffing of authorized personnel for all English Learner programs

and makes it a priority to hire CLAD or equivalent teachers. Teachers providing instruction in a Mainstream English Program shall be authorized to provide appropriate core content and ELD instruction. This is achieved via a CLAD or equivalent authorization.

Teachers who are not currently authorized but who are working with English Learners, shall be required to sign a memorandum of understanding stipulating that they will be actively participating in professional development designed to secure appropriate authorization within two years. The HR Department will then monitor attendance at professional development activities to ensure that such teachers remain on track to complete the necessary training for their authorizations.

Access to Core Curriculum

All English learners are provided quality, standards-based, rigorous curriculum and instruction in all CORE content areas as well as Advanced Placement courses, enrichment classes, and college and career programs. Integrated ELD instruction and strategies are consistently implemented to meet the individual needs of each English learner.

Specially Designed Academic Instruction in English (SDAIE)
SDAIE is a methodology used to make subject area content, delivered in English, comprehensible in order to meet the needs of limited-English-proficient pupils. Academic instruction through English is modified to meet the student's level of language proficiency. Teachers use specialized strategies that enable students to understand, participate in, and access the core curriculum. (EC 44253.2[b]).

English as the Language of Instruction

In accordance with California Education Code Section 305, all students in California public schools, including those enrolled in independent study programs, must be taught in English for all core academic areas. This is to include, but not limited to, English Language Arts, Math, History, and Science. This requirement ensures that all students, including English Learners, receive equitable access to instruction that promotes English language proficiency and academic success.

To meet this requirement:

- Instruction in all subjects will be provided in English, including synchronous and asynchronous components of the independent study program.
- Participation in synchronous and/or asynchronous instruction for all core academic areas in English is mandatory for all English Learner students, regardless of their English Learner status or participation in an ELD program, as this is essential for meaningful interaction and mastery of academic content.
- Opting out of this instruction is not permitted, as it is integral to ensuring compliance with state law and the successful implementation of Sage Oak's academic program.

This policy ensures that Sage Oak Charter Schools uphold the legal and educational responsibilities to all students, fostering an environment where English language acquisition and academic achievement are prioritized.

English Language Development

English Language Development (ELD) Standards

Sage Oak's English Language Development program is grounded in research and aligned to the 2014 California State ELA/ELD Framework. The ELA/ELD Framework helps define how the California English Language Arts and English Language Development standards will be taught and assessed. Both sets of standards represent the skills, knowledge, and abilities English learners must possess in order to become 21st Century and College and Career Ready and describe what students should know and be able to do at each of the five levels of English proficiency. Sage Oak is committed to implementing the ELA/ELD Framework, the California State Standards, and English Language Development Standards through its adopted ELA/ELD programs. As stated in the ELA/ELD Framework Executive Summary: "The purpose of ELD instruction is to amplify (magnify and make clear) areas of English language development that are crucial for academic learning. The standards emphasize language learning as a social process and language itself as a complex and dynamic meaning-making resource. The standards help teachers support EL students to interact meaningfully with others and complex texts, engage in and learn through intellectually challenging tasks across the content areas, develop academic English, and develop awareness about how English works so that they can use it intentionally and purposefully."

The California ELD standards are organized into three parts.

Part 1: Interacting in Meaningful Ways
English learners participate in meaningful and intellectually challenging tasks in three ways:

- Collaboratively, by communicating with others about social and academic topics.
- Interpretively, by understanding written and spoken information.
- Productively, by writing or presenting to explain ideas and information.

Part II: Learning About How English Works
English learners comprehend and produce academic texts in various content areas.

- English learners use language to create organized texts, expand and enrich ideas, and connect and condense ideas.

Part III: Using Foundational Literacy Skills.
This section emphasizes how all teachers play a crucial role in developing the literacy of ELs.

- English learners at all grades require specialized instruction to learn foundational literacy skills based on their age, previous literacy, and educational experiences

The CA ELD Standards are aligned to the CA CCSS for ELA/Literacy as they magnify and make clear areas of English language development that are crucial for academic learning. The standards emphasize language learning as a social process and language itself as a complex and dynamic meaning-making resource. They promote the notion of supporting English Learners to develop awareness that different languages and variations of English exist and that their home languages and cultures are valuable resources in their own right and useful for building proficiency in English.

Key Themes of ELA/Literacy and ELD Instruction
Meaning Making
Meaning making is at the heart of ELA/literacy and ELD instruction. It is the central purpose for interacting with text, producing text, engaging in research, participating in discussion, and giving presentations. It is the reason for learning foundational skills and for expanding language. Meaning making includes literal understanding but is not confined to it at any grade or with any student. Inference making and critical reading, writing, and listening are given substantial and explicit attention in every discipline. Among the contributors to meaning making are language, knowledge, motivation, and, in the case of reading and writing, the ability to recognize printed words and use the alphabetic code to express ideas.

Language Development

Language is the cornerstone of literacy and learning. It is with and through language that students learn, think, and express information, ideas, perspectives, and questions. The strands of the CA CCSS for ELA/ Literacy—Reading, Writing, Speaking and Listening, and Language—all have language at the core, as do the parts of the CA ELD Standards—Interacting in Meaningful Ways, Learning About How English Works, and Using Foundational Literacy Skills. Students enrich their language as they read, write, speak, listen, interact, and learn about language. The foundational skills provide access to written language.

Effective Expression

Each strand of the CA CCSS for ELA/Literacy and each part of the CA ELD Standards includes attention to effective expression. Students learn to examine the author's craft as they read, analyzing how authors use language, text structure, and images to convey information, influence their readers, and evoke responses. Students learn to effectively express themselves as writers, discussion partners, and presenters, and they use digital media and visual displays to enhance their expression. They gain command over written and spoken English conventions, and they learn to communicate in ways appropriate for the context and task.

Content Knowledge

Content knowledge is a powerful contributor to the comprehension of text. It also undergirds the ability to write effective opinions/arguments, narratives, and explanatory/informational text, engage in meaningful discussions; and present ideas and information to others. It contributes significantly to language development, and it is fundamental to learning about how English works. Both sets of standards ensure that students can learn from informational texts and can share their knowledge as writers and speakers. An organized independent reading program contributes to knowledge. Content knowledge has a powerful reciprocal relationship with the development of literacy and language.

Foundational Skills

Acquisition of the foundational skills enables students to independently read and use written language to learn about the world and themselves, experience extraordinary and diverse works of literary fiction and nonfiction, and share their knowledge, ideas, stories, and perspectives with others. Students who know how to decode and develop automaticity with an increasing number of words are best positioned to make significant strides in meaning making, language development, effective expression, and content knowledge. At the same time, attention to those themes provides the very reason for learning about the alphabetic code and propels progress in the foundational skills.

Charter schools enrolling English Learners have a dual obligation, as do all LEAs, to provide a program for EL students designed to overcome language barriers and provide access to the core curriculum (Castañeda v. Pickard 648 F.2d 989, [5th Cir. 1981]). The CDE recognizes that both services, including classified ELD, must be an integral part of a comprehensive program for every English Learner.

The ability to read, write, and communicate with competence and confidence in English across a range of personal and academic contexts expands students' opportunities for career and college success, full and wise participation in a democratic society and global economy, and achievement of their personal aspirations. Moreover, literacy and language skills provide individuals with access to extraordinary and powerful literature that widens perspectives, illuminates the human experience, and deepens understandings of self and others.

Designated English Language Development

Sage Oak's English language development program is designed to support the academic success and reclassification of English learners. The teacher implements techniques, methodology, and supplemental curriculum designated to teach ELs explicitly about the English language, academic vocabulary, and develop their English language proficiency in all four language domains: speaking, listening, reading, and writing. Sage Oak Charter Schools will create a personalized ELD instruction pathway geared to the student's level of English proficiency.

Designated ELD instruction and individual academic support are provided to English learners during dedicated times each week. Students are grouped for designated ELD by their English language proficiency levels (Emerging, Expanding, Bridging). However, the three levels of language proficiency are not static but rather represent a continuum of language learning and decisions about grouping will be made in the student's best interest. Teachers use the student's production and interpretation of the English language to choose appropriate learning supports, inform instructional decisions, and keep track of academic progress.

Instructional Materials to Support the CA CCSS for ELA/Literacy and CA ELD Standards

The Designated ELD curriculum and materials were chosen specifically to address the varied cultural and language backgrounds our English learners possess, enabling learners and educators to celebrate their own cultures and everyday lived experiences while also learning about those of others. It includes authentic content from around the world to develop the student's understanding of different cultures and viewpoints of others around the globe.

The State Board of Education adopts instructional materials for use by students in kindergarten through grade eight. LEAs- school districts, charter schools, and county offices of education- ARE NOT required to purchase state-adopted instructional materials according to EC Section 60210(a). If an LEA chooses to use non-adopted materials, it has the responsibility to adopt materials that best meet the needs of its students and to conduct its own evaluation of instructional materials. The review must include a majority of classroom teachers from that content area or grade-level ED Section 60210(c). EC Section 60002 requires the LEA to promote the involvement of parents and other members of the community in the selection of instructional materials, in addition to teacher involvement.

Professional Learning

Professional Development

Sage Oak Charter Schools provides ongoing professional development opportunities to all teachers and staff working with English Learners. The goal of this training is to help educators acquire specific skills needed to work with English Learners in the areas of ELD instruction, comprehensible core content instruction, program designs, curriculum expectations, and processes and services for English Learners. Training should also focus on multiculturalism and up-to-date research and pedagogy for English Learners to receive equitable and accessible support and opportunities to achieve and reach their goals.

Staff development opportunities include, but are not limited to, the following:

- ELD Standards
- ELPAC assessment and identification levels
- ELD strategies and instruction
- SDAIE strategies and instruction
- Differentiated instruction
- Shared Best Practices

To ensure that all staff working with parents of EL students are appropriately trained, training participation and completion are documented.

Family & School Partnerships

Sage Oak Charter Schools seeks to promote positive collaboration between parents and the school by promoting open communication and developing a working partnership between parents and the schools to provide equal access to education for all students. Parents of English Learners (EL) are encouraged to participate in their children's education and be active in assisting their children in attaining English proficiency, achieving academically at high levels, and meeting state standards. Parents are given information about the English Learner Advisory Committee (ELAC) and are encouraged to participate.

English Learner Advisory Committee (ELAC)

An English Learner Advisory Committee is a school-level committee composed of parents, staff, and community members designated to advise school officials on English learner programs and services and is required for any California public school with 21 or more English Learners. The ELAC shall be responsible for the following tasks:

- Advising the principal and staff in the development of a site plan for English learners.
- Assisting in the development of the schoolwide needs assessment.
- Ways to make parents aware of the importance of regular school attendance.
- Assisting in the evaluation of the English Learner Master Plan.
- Each ELAC shall have the opportunity to select at least one member to the District English Learner Advisory Committee (DELAC). Districts with 31 or more ELACs may use a system of proportional or regional representation. Parents or guardians of English Learners shall constitute at least the same percentage of the ELAC membership as their children represent the student body. The parents or guardians of English Learners shall elect the parent members of ELAC. Parents or guardians of English Learners shall be provided the opportunity to vote in the election. ELAC members shall receive training materials and training that will assist them in carrying out their required advisory responsibilities. Training shall be planned in full consultation with committee members, and funds from appropriate resources may be used to meet the costs of providing the training including costs associated with the attendance of members at training sessions. ELAC meeting agendas will be posted on the school website.

ELAC Membership

All parents/guardians of ELs and recently RFEPed students (within the academic school year) have an opportunity to participate as members of the committee. Members receive training and materials to assist members in carrying out their legal responsibilities in alignment with California

Education Code, sections 35147, 52176(b) and (c), 62002.5, and 64001(a) and California Code of Regulations, Title 5, Section 11308.

The ELAC is composed of the following:

- Principal or designee
- Parents of EL and students redesignated (RFEP) within the academic school year.
- School staff

Assessment and Student Program Monitoring

Accountability and Evaluation

California has been working for the past several years to improve education at the state level. The goal is to increase the academic achievement of all students by creating a coordinated system through the use of content and performance standards. In response to statewide accountability reform, Sage Oak Charter Schools provides clearly defined standards and expectations for student learning. It has a primary goal that all students will meet the charter's academic content and performance standards.

Through the Sage Oak Charter Schools assessment program, the assessment and accountability department carefully considers what students are asked to do, how student performance is evaluated, and how evaluation results are used. The assessment program is responsive to the developmental differences, linguistic differences, and special needs of English Learners. Through multiple forms of assessment, Sage Oak Charter Schools is able to determine to what degree English Learners are achieving English proficiency and meeting academic achievement goals.

Sage Oak Charter Schools' assessment practices with respect to English Learners are designed to:

- Assess and monitor language development by time in the program
- Assess academic achievement in meeting grade level core standards
- Assess progress of ELs achieving ELD grade level standards
- Ensure learning opportunities in reading and writing are provided
- Monitor that targeted interventions are working

Assessment data is compiled, analyzed and reported by Sage Oak Charter Schools leads and Data and Assessment Department. Their reports are then analyzed by the school leadership team, to produce a set of suggested program modifications, which are then shared with the Board of Directors, teachers, and EL parents for additional input and approval.

Sage Oak Charter Schools annually determines the number and percentage of EL students who have become RFEP through ongoing uploads of information to CALPADS. CALPADS reports the actual count of EL, IFEP, and RFEP students during the calendar year as well as the number of teachers providing and authorized to provide appropriate instruction for English Learners.

Monitoring of Long-Term English Learners

Long-term English Learners (LTEL) are defined as students who are in grades 6 to 12, have been enrolled in U.S. schools for more than six years, have remained at the same level of English for two or more years as measured by the state's annual proficiency exam, and have scored "standard not met" or "standard nearly met" on the CAASPP ELA assessment.

ELs with little or no English proficiency need more time than native-English speakers to meet grade-level benchmarks in English and state-mandated testing targets. Schools must monitor student progress to ensure that additional and appropriate learning opportunities are provided in English language development and in reading, writing, and other academic content areas in order to close the achievement gap.

Benchmark assessments, course grades, and the CAASPP assessments, along with the number of years a student has been classified as an EL student, are used to determine if a student is making the appropriate movement toward becoming RFEP.

If, despite the implementation of school-wide interventions and supports, a student is still not making “adequate progress,” the school will hold a Student Study Team meeting to discuss the lack of progress. The SST team will plan further evaluation and intervention to support students who are not meeting interim benchmarks. Interventions will be noted and filed on the EL Master Tracking Spreadsheet, in their cumulative folder, and/or in a collaborative Google document. Additionally, parents will be notified annually if their student is at risk of becoming an LTEL or has been classified as an LTEL.

Meeting the Needs of Long-Term English Learners

The National Education Association’s Publication: Meeting the Unique Needs of Long-Term English Language Learners, A Guide for Educators provides valuable research-based information and best practices to guide schools and LEAs in supporting students at risk for becoming Long Term English Learners (LTEL).

Elementary School Strategies and Programs that Prevent the Creation of Long-Term English Language Learners:

The trajectory of a Long Term English Language Learner begins in elementary school. Taking the necessary steps early enough can help prevent an entire new generation of long-term ELL students. Successful elementary school programs offer high-quality language development programs and strategies that are consistent across grade levels.

- English Language Development/English as a Second Language: Dedicated, daily, and standards-based ELD/ESL programs address the specific needs of students at each fluency level and support instruction with quality materials that focus on all four language domains—with a major emphasis on building a strong oral language foundation; using language for interaction and meaning-making; and developing complex, precise, and academic language.
- Home language development: Programs that develop students' home language (oral and literacy) to threshold levels are a strong foundation for developing English literacy and academic success (at least through third grade, more powerfully through fifth grade, and optimally, ongoing throughout a student's education). Teaching students to read in their first language promotes higher levels of reading achievement in English and provides students with the benefits of bilingualism.
- Use curriculum, instruction, and strategies. Use resources that promote transfer between English and the home language.
- Enriched oral language development: Emphasize oral language throughout the curriculum.
- Modified instructional strategies and supplemental materials provide access to academic content.
- Program coherence and consistency: Provide coherence and consistency of program across grades, including, wherever possible, articulation and alignment with preschool.
- High-quality literature: Provide students/LTELs with exposure to high-quality literature and complex and expressive language.

Seven Basic Principles for Meeting the Needs of Middle and High School LTELs

Seven basic principles lie at the heart of successfully educating middle and high school Long Term English Language Learners:

1. Urgency: Focus urgently on accelerating LTEL progress towards attaining English proficiency and closing academic gaps.
2. Distinct needs: Recognize that the needs of LTELs are distinct and cannot adequately be addressed within a "struggling reader" paradigm or a generic "English Language Learner" approach, but require an explicit LTEL approach.

3. Language, literacy, and academics: Provide LTELs with language development, literacy development, and a program that addresses the academic gaps they have accrued.
4. Home language: Affirm the crucial role of home language in a student's life and learning, and provide home language development whenever possible.
5. Three R's: rigor, relevance, and relationships: Provide LTELs with rigorous and relevant curriculum and relationships with supportive adults (along with the supports to succeed).
6. Integration: End the ESL ghetto, cease the sink-or-swim approach, and provide maximum integration without sacrificing access to LTEL supports.
7. Active engagement: Invite, support, and insist that LTELs become active participants in their own education.

Instructional Support System

The Charter School is committed to closing the achievement gap for all students, including English Learners. The Instructional Support System for English Learners is a part of the standards-based system of instruction, assessment, monitoring, and evaluation provided for all students.

The Instructional Support System for English Learners is designed to provide the mechanisms for recording EL achievement, detecting academic deficits, and monitoring the effectiveness of interventions.

To ensure all students will catch up to their grade-level peers, we have the following essential elements:

1. All English Learners are held to the same Charter-adopted curriculum and performance standards in the core curricular areas as all other students.
2. All English Learners participate in a program of curriculum and instruction that is aligned to state content standards and designed to reduce all language barriers. The English Learner program is designed to ensure that participating EL students acquire English and learn grade-level academic content simultaneously and to the greatest extent possible. Components of this program include ELD, grade-level core curriculum, and assessment.
3. The Instructional Support System for English Learners includes an assessment and reporting process of student academic achievement for all students, including English Learners. The use of multiple measures, the disaggregating of student achievement data, and the regular reporting of student achievement data are integral components of the Charter assessment and reporting process.
4. The performance of EL and RFEP students is monitored:

a. Students identified in need of interventions are provided the appropriate intervention aimed at filling in gaps in content knowledge so that ELs can gain full access to grade-level core content instruction in a reasonable period of time.
b. Any areas of deficiency are noted, and appropriate modifications in instructional programs or student support systems are identified.

The Instructional Support System described here for ELs is based on five (5) essential elements that include adopted curriculum standards; curriculum and instruction aligned with adopted standards; assessment and reporting; charter and site level monitoring and intervention; and program evaluation.

1. Adopted Curriculum Standards: In Sage Oak Charter Schools each English Learner is held to the same charter-adopted curriculum standards in the core curricular areas of English Language Arts, math, history-social science, and science as every other charter student. In addition, each EL student is expected to demonstrate mastery of the adopted ELD standards.
2. Curriculum and Instruction Aligned with Adopted Standards: Sage Oak Charter Schools supports each English Learner in his/her appropriate level of language development in the core courses. Each English Learner participates in an instructional program with state-adopted materials that are aligned with charter and state standards. Through articulation meetings, staff members discuss and interpret data on English Learner students to address the issues surrounding English Learners who may have been in the educational system for some time and seem unable to move beyond this level.
3. Assessment and Reporting: Sage Oak Charter Schools administers all state-mandated examinations. ELPAC assessments and ongoing multiple measures are used to assess student proficiency. Results are entered into the EL Master Tracking Spreadsheet for instructional planning and monitoring. Overall, student results are shared with the CEO and governing board.
4. Monitoring and Intervention: English Learner's assessment results are recorded on the EL Master Tracking Spreadsheet. The results are monitored to evaluate student learning in order to inform instruction and provide interventions as needed. When, according to ongoing assessments, students cannot meet interim expectations in academic content, they shall be referred by teachers and parents to receive academic interventions and support that enable them to overcome any academic deficits before they become irreparable. The intervention itself will directly target the identified academic need. Delivery of the intervention shall be monitored and documented. The effectiveness of the intervention will then be determined based on student work and assessments.
5. Program Evaluation: Sage Oak will conduct periodic evaluations of the effectiveness of its ELL program to determine if any modifications or improvements are required. This evaluation will

include looking at the implementation of the ELL program, the effectiveness of the ELL program in meeting its goals for students (English language development and the ability to participate meaningfully in the educational program), and gathering appropriate input from knowledgeable persons and other stakeholders.

Note: When Special Education students, identified as ELs, are not making adequate progress, Special Education teachers must schedule an IEP meeting to discuss further interventions.

Monitoring of Reclassified Students

The school's Lead, teachers, parents, and the assessment Lead supervise the process of monitoring reclassified students. School staff will use the Smarter Balanced assessment, local multiple measure scores, and teacher assessments and observations to semi-annually monitor the progress of RFEP students for a period no less than four (4) years after reclassification. Student performance shall be reviewed at each progress reporting period. Those students found to be regressing in their academic performance will be referred to receive an academic intervention in the specific area of need.

Coversheet

(Action) Approval of New 4155-SO Employee Recognition and Awards Policy

Section: XVI. Policy Development
Item: A. (Action) Approval of New 4155-SO Employee Recognition and Awards Policy
Purpose: Vote
Submitted by:
Related Material: 4155-SO Employee Awards and Recognition Policy.pdf

BACKGROUND:

Sage Oak Charter Schools requests the Board approve the new Employee Recognition and Awards Policy, which was developed as a proactive measure to support fiscal transparency in the use of public funds for employee recognition. With the launch of the Sage Milestones program and the annual allocation of funds for employee recognition tokens, the policy establishes a board-approved, public-facing framework aligned with Education Code 44015 to provide clarity, consistency, and transparency regarding these expenditures.

RECOMMENDATION:

It is recommended the Board approve the new 4155-SO Employee Recognition and Awards Policy as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).

PERSONNEL SERVICES 4155-SO

EMPLOYEE AWARDS AND RECOGNITION

The Board of Directors recognizes that the success of Sage Oak Charter Schools ("School") depends upon the dedication, professionalism, and commitment of its employees. The Board believes that meaningful recognition of employee service and achievement promotes morale, strengthens organizational culture, and supports the School's mission and goals.

The Board authorizes recognition of employees who, in the judgment of the Board, Superintendent, or designee, demonstrate outstanding contributions, years of service, or actions that significantly enhance the effectiveness and success of the School.

Recognition may include service awards and other forms of acknowledgment presented annually or at other appropriate times.

Awards and recognition may consist of certificates, letters of commendation, service pins, plaques, trophies, apparel, food items, flowers, or other suitable tokens of appreciation. All awards and recognition items must receive prior approval from the Superintendent or designee. Any award granted under the provisions of this policy shall not exceed $200, consistent with Education Code section 44015, or any subsequent revision thereof.

All expenditures for employee awards and recognition shall be consistent with applicable law, Board-approved budgets, and established purchasing procedures.

Coversheet

(Hearing) 2026-27 Local Control and Accountability Plans (LCAP)

Section: XVII. Public Hearing
Item: A. (Hearing) 2026-27 Local Control and Accountability Plans (LCAP)
Purpose: Discuss
Submitted by:
Related Material:
2026-27 Local Control & Accountability Plan_Presentation.pdf
2026-27 Local Control and Accountability Plan_Sage Oak Charter School (#1885).pdf
2026-27 Local Control and Accountability Plan_Sage Oak Charter School - Keppel (#1886).pdf
2026-27 Local Control and Accountability Plan_Sage Oak Charter School - South (#2051).pdf
2026-27 LCFF Budget Overview for Parents_Sage Oak Charter School (#1885).pdf
2026-27 LCFF Budget Overview for Parents_Sage Oak Charter School - Keppel (#1886).pdf
2026-27 LCFF Budget Overview for Parents_Sage Oak Charter School - South (#2051).pdf

BACKGROUND:

Sage Oak Charter Schools is required to hold a public hearing of the Local Control and Accountability Plans (LCAPs) for the 2026-27 school year, covering all three charter schools. The LCAPs offer a detailed three-year strategic plan to enhance student success in key priority areas defined by the state. The Budget Overview for Parents will also be shared, promoting transparency and accountability in fiscal planning. The formal adoption of the LCAPs is set for the Regular Board of Directors Meeting on June 18, 2026.

RECOMMENDATION:

Education Code Section 47606.5 states that a charter school's Governing Board shall hold a public hearing as part of the process to adopt Local Control and Accountability Plans (LCAPs). This public hearing is for the 2026-27 LCAPs and Federal Addendums for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).

Sage Oak Charter Schools

Local Control Accountability Plan Annual Update

June 2026

LCAP Strategic Goals

Goal 1

Academic Achievement & College and Career Readiness

Goal 2

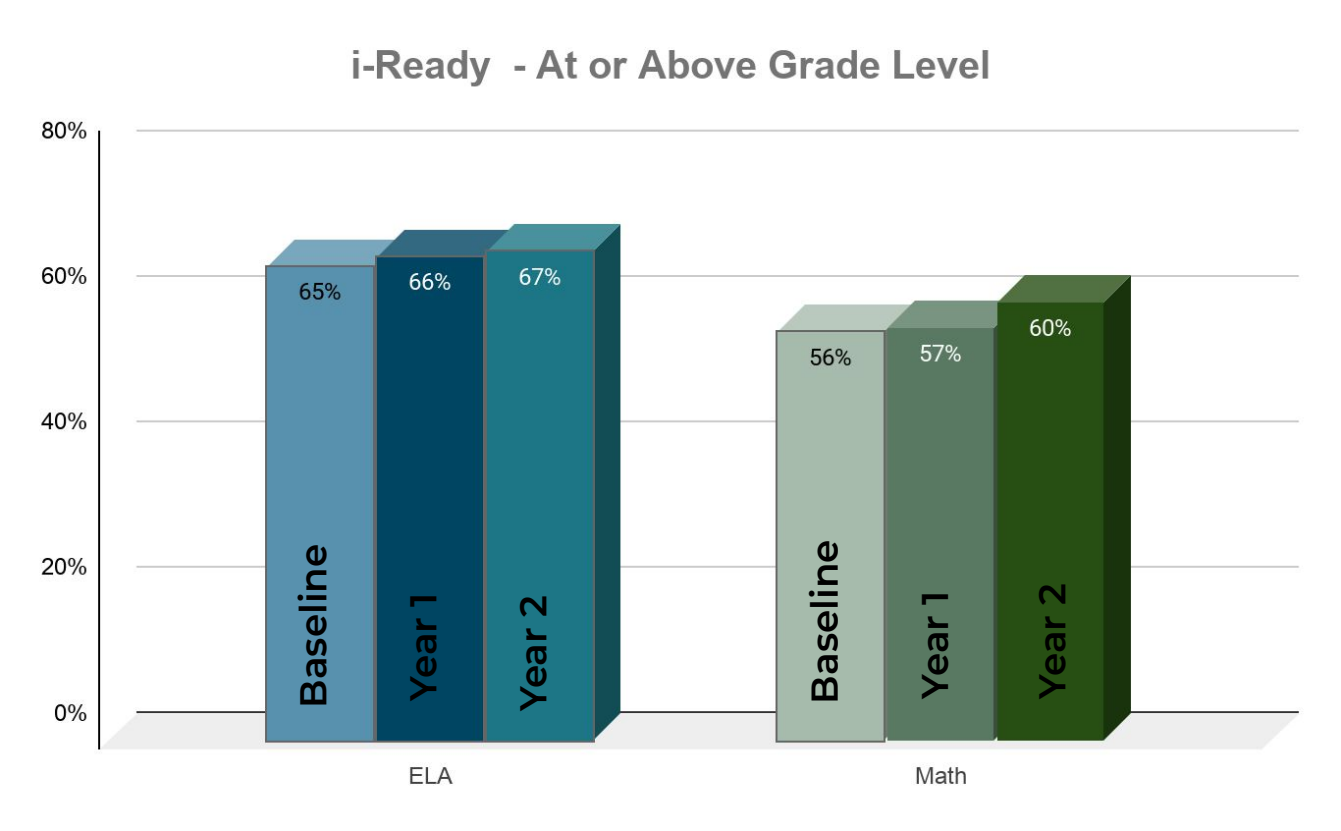
Engagement: Fostering a Supportive & Engaging Learning Environment

Goal 3

Conditions of Learning: Efficient Operations with a Focus on Sustainability

Local Assessment Results

GOAL 1 | ACTION 2



GOAL 1 | ACTION 3

Math Interventions for Students with Disabilities

Sage Oak
54% → 66%

Sage Oak South
40% → 55%

Sage Oak Keppel
60% → 63%

TARGET | 60% FOR ALL SCHOOLS

GOAL 1 | ACTION 4

Unified Articulation:
Preparing Students for Every Transition

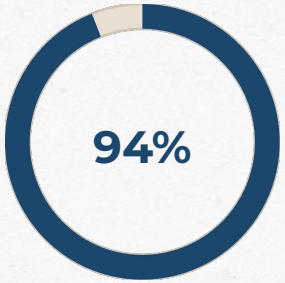
Survey prompt: "Do you feel equipped to effectively communicate and prepare your students for the expectations and standards of the next grade level band?"

GOAL 1 | ACTION 5

English Learner Progress & Reclassification

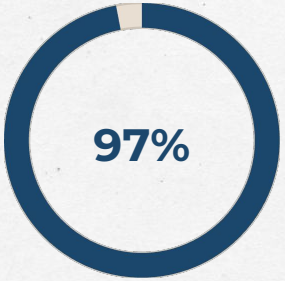
Parent Agreement

Families report access to resources supporting their EL student's achievement



Student Agreement

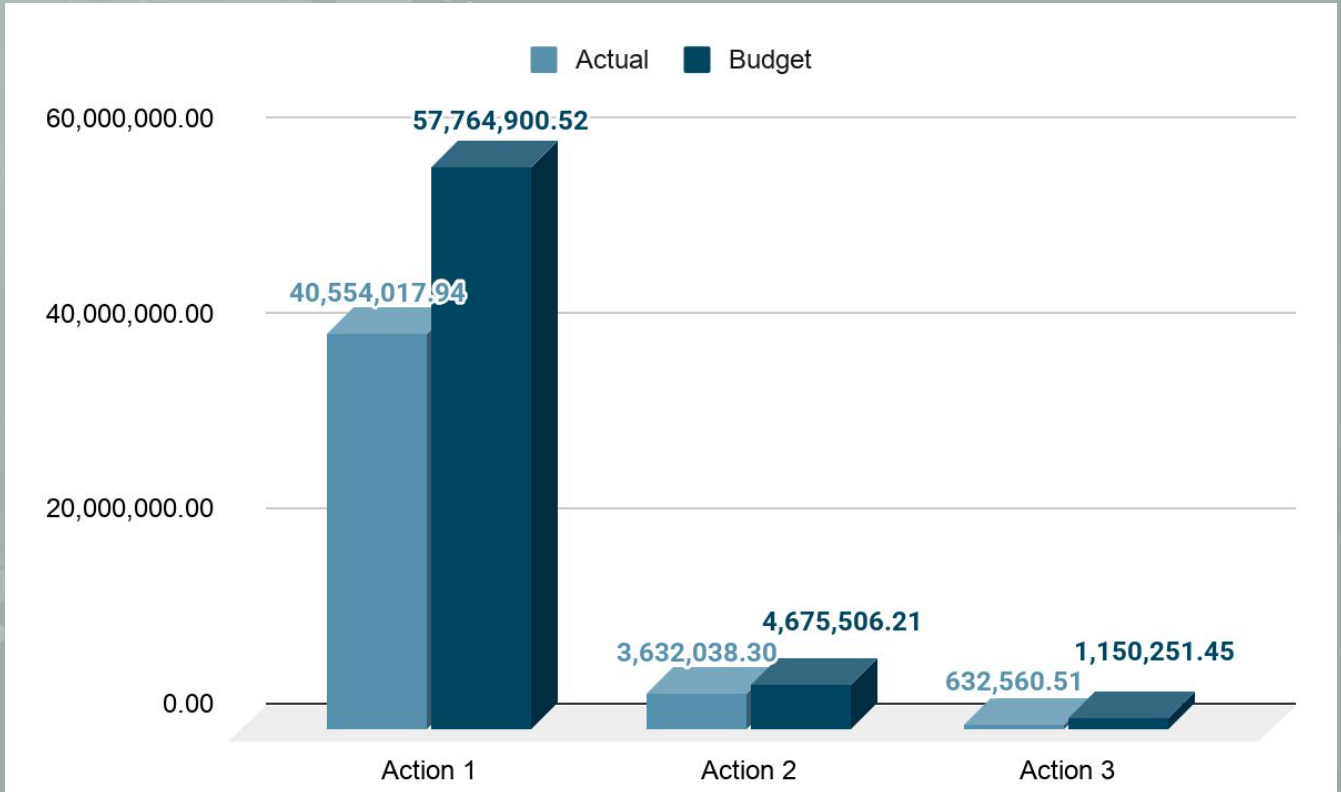
Students report access to effective EL support resources



Staff Agreement

Staff confirm availability of EL support resources

Goal 1 Fiscal - Sage Oak



TOTALS	$44,818,616.75	$63,590,658.18

GOAL 2 ACTION 1

Connecting Community to School Mission

Average Daily Attendance (ADA) — 2025–26

99.21%	99.33%	99.21%
Sage Oak	South	Keppel

GOAL 2 | ACTIONS 2 & 3

Professional Development & Leadership Pathways

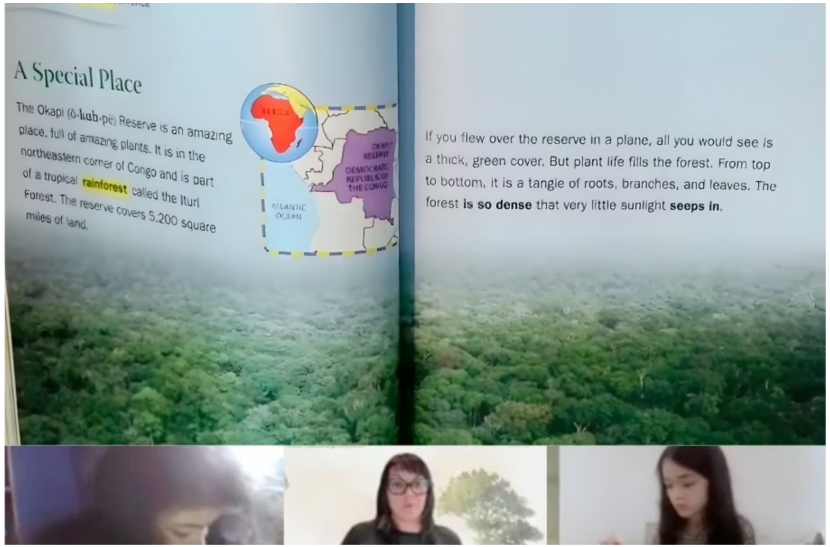
90%
Confident to implement new strategies

88%
Staff retention in leadership pathway

97%
All Staff report feeling well-equipped following PD participation

GOAL 2 | ACTION 4

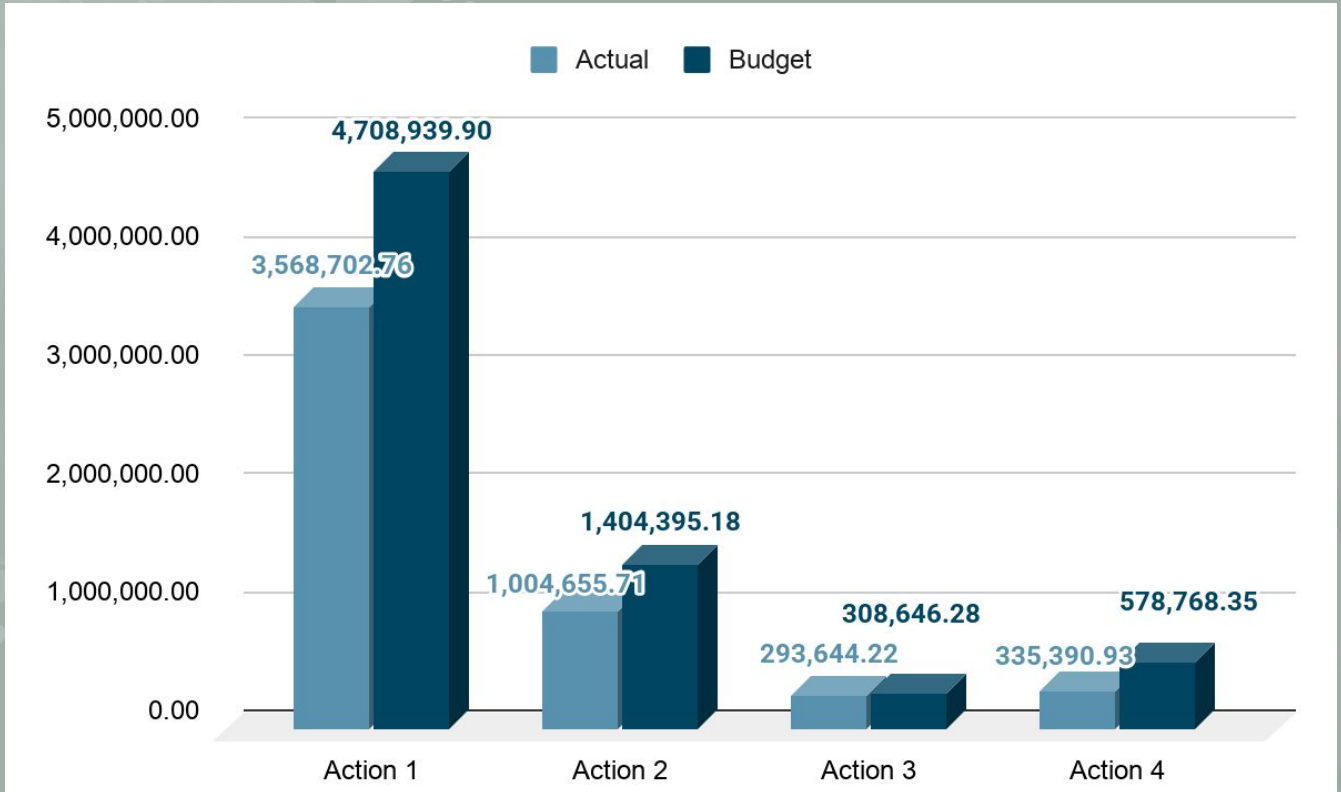
Expanding Social & Emotional Resources



Synchronous Counseling Groups

66 → 238

Goal 2 Fiscal - Sage Oak



TOTALS	$5,202,393.62	$7,000,749.71

Powered by BoardOnTrack

GOAL 3 | ACTION 1

Technology Integration & Operational Efficiency

Evaluate

Integrate

Optimize

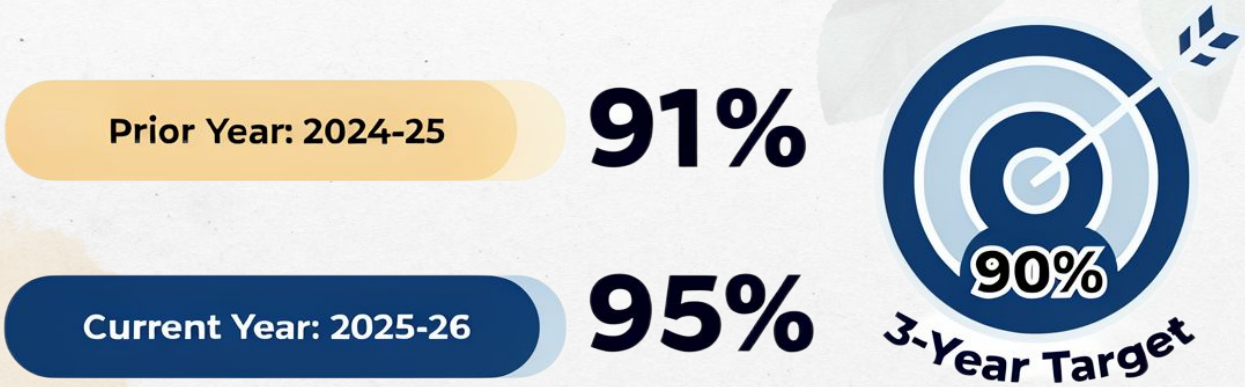
96%

Staff reported improved efficiency and satisfaction

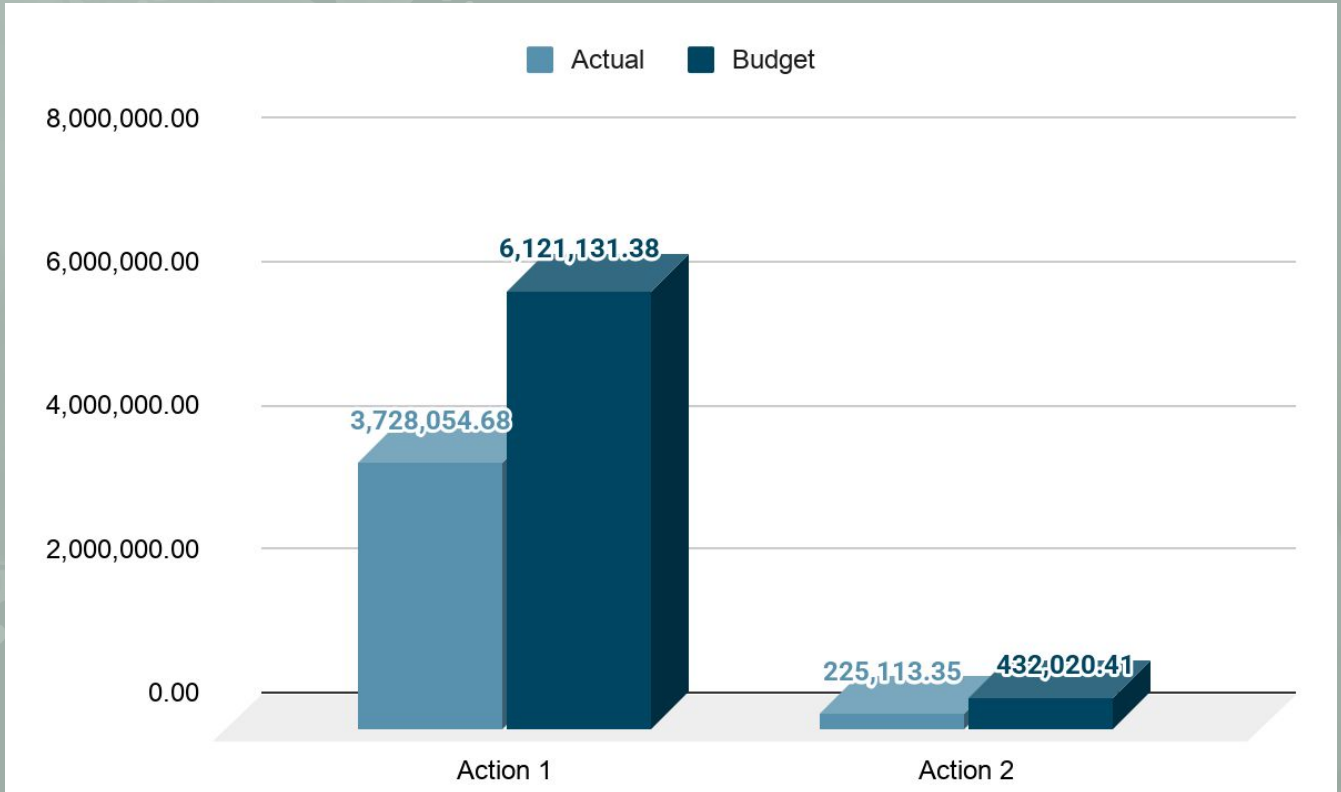
GOAL 3 | ACTION 2

AI-Driven Personalized Learning

Staff Survey: "Do you feel confident in your ability to use AI tools to improve learning outcomes, given the training you have received?"



Goal 3 Fiscal - Sage Oak



TOTALS	$3,953,168.03	$6,553,151.79

Looking Ahead: Year 3 Priorities and Next Steps

Goal 1

Student Success

Goal 2

Engagement

Goal 3

Smart Learning Systems

SAGE OAK
CHARTER SCHOOLS

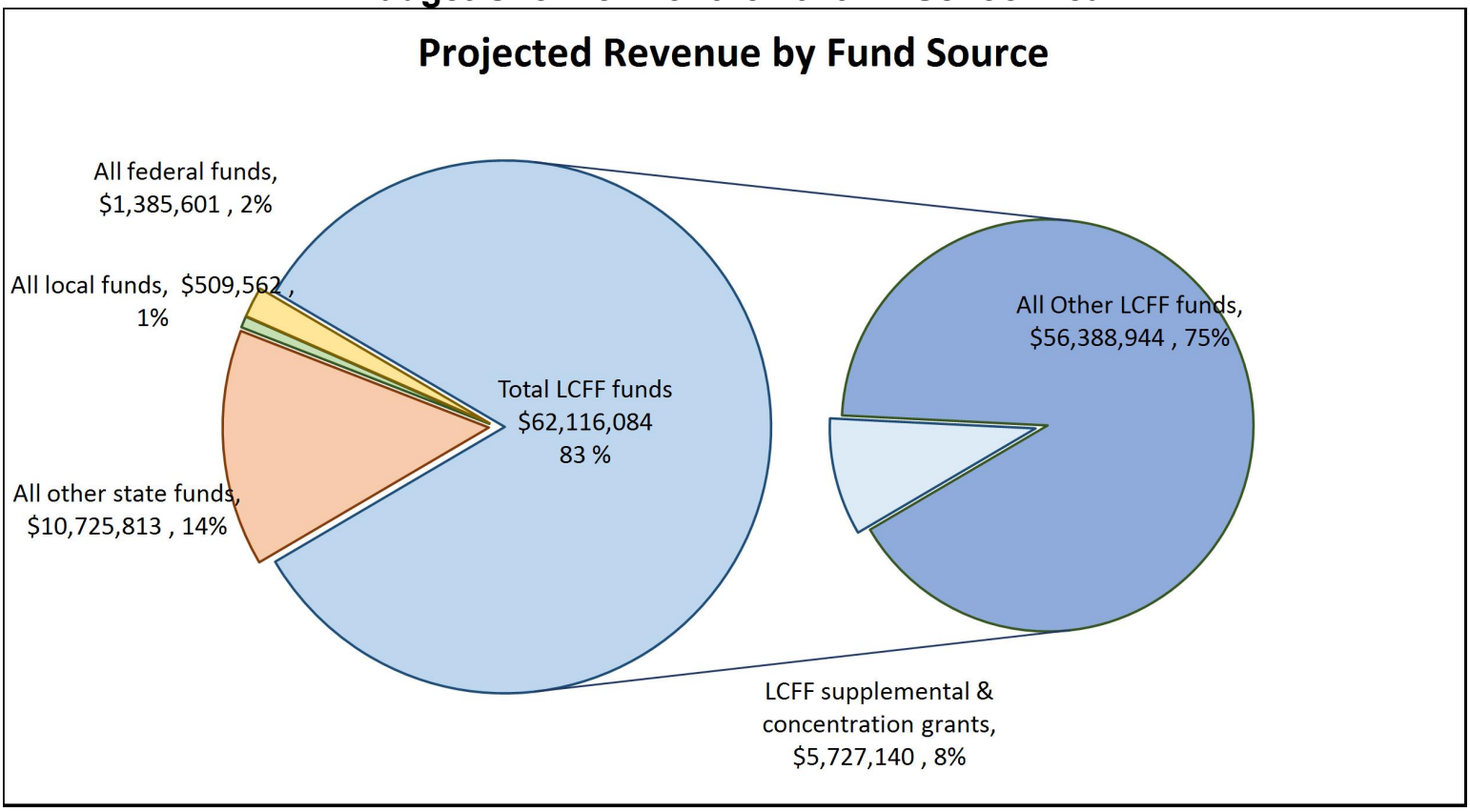
Thank You!

LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Sage Oak Charter School
CDS Code: 36-67736-0136069
School Year: 2026-27
LEA contact information:
Krista Woodgrift
Superintendent
kwoodgrift@sageoak.education
888-435-4445

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

Budget Overview for the 2026-27 School Year

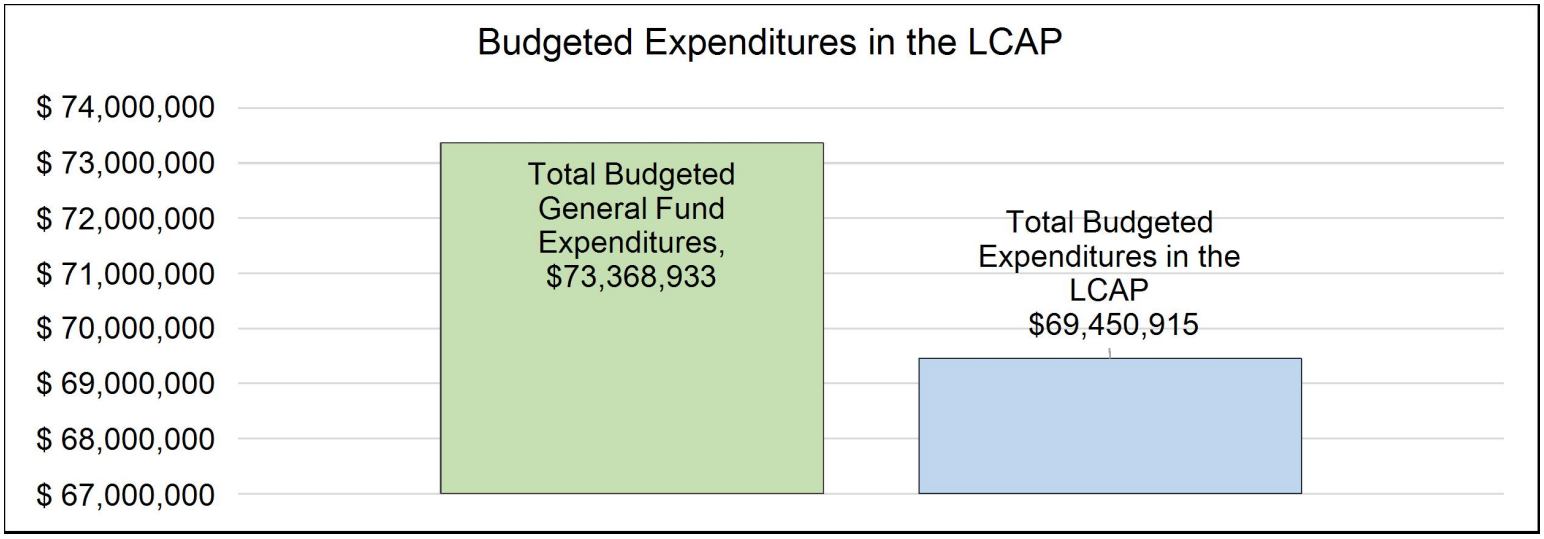


This chart shows the total general purpose revenue Sage Oak Charter School expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Sage Oak Charter School is $74,737,060, of which $62,116,084 is Local Control Funding Formula (LCFF), $10,725,813 is other state funds, $509,562 is local funds, and $1,385,601 is federal funds. Of the $62,116,084 in LCFF Funds, $5,727,140 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Sage Oak Charter School plans to spend for 2026-27. It shows how much of the total is tied to planned actions and services in the LCAP.

The text description of the above chart is as follows: Sage Oak Charter School plans to spend $73,368,933 for the 2026-27 school year. Of that amount, $69,450,915 is tied to actions/services in the LCAP and $3,918,018 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

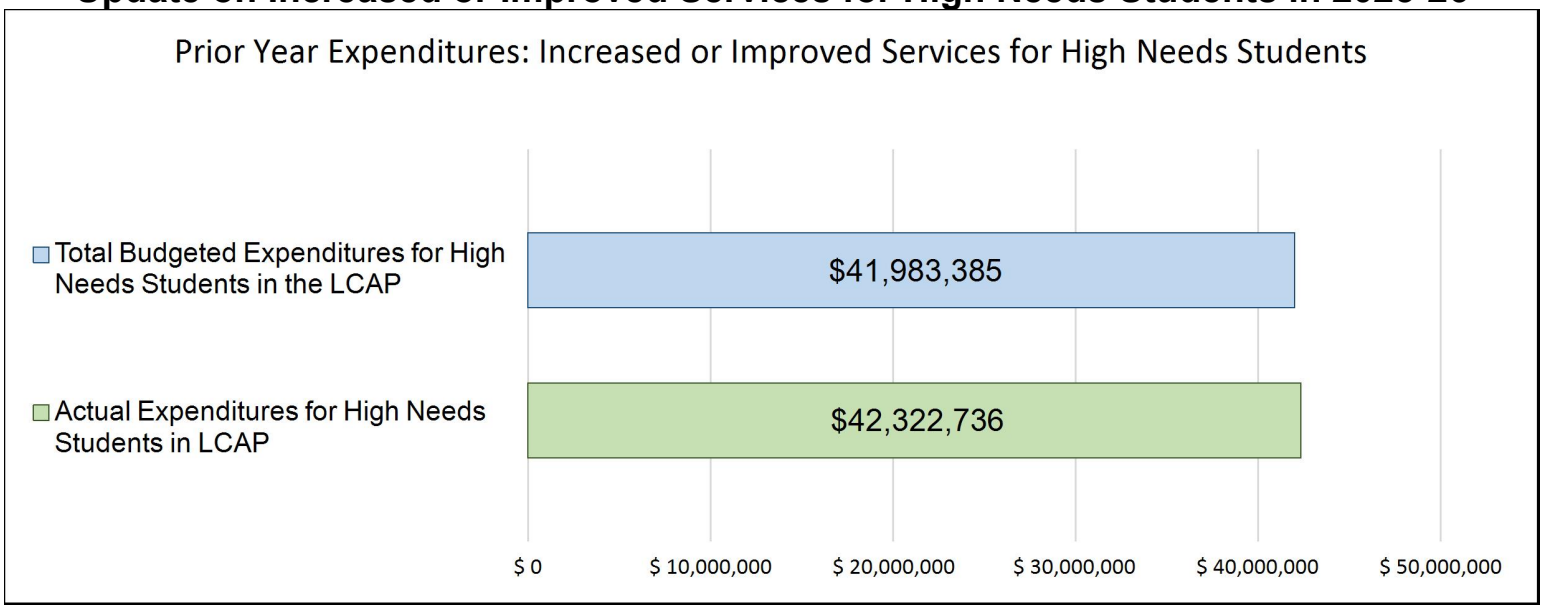
Certain expenditures such as charter oversight fees, human resources administration, legal and compliance services, insurance, rent, and utilities, are necessary operational costs incurred to maintain Sage Oak's educational program and organization infrastructure.

Increased or Improved Services for High Needs Students in the LCAP for the 2026-27 School Year

In 2026-27, Sage Oak Charter School is projecting it will receive $5,727,140 based on the enrollment of foster youth, English learner, and low-income students. Sage Oak Charter School must describe how it intends to increase or improve services for high needs students in the LCAP. Sage Oak Charter School plans to spend $52,051,000 towards meeting this requirement, as described in the LCAP.

LCFF Budget Overview for Parents

Update on Increased or Improved Services for High Needs Students in 2025-26



This chart compares what Sage Oak Charter School budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Sage Oak Charter School estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2025-26, Sage Oak Charter School's LCAP budgeted $41,983,385 for planned actions to increase or improve services for high needs students. Sage Oak Charter School actually spent $42,322,736 for actions to increase or improve services for high needs students in 2025-26.

Local Control and Accountability Plan

The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Sage Oak Charter School	Krista Woodgrift Superintendent	kwoodgrift@sageoak.education 888-435-4445

Plan Summary [2026-27]

General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA. LEAs may also provide information about their strategic plan, vision, etc.

Sage Oak Charter School (Sage Oak) educates students through a personalized and collaborative learning approach, offering students from transitional kindergarten through 12th grade an empowering education designed to prepare them for purposeful and productive lives. At Sage Oak, we cherish the individuality of each student, inspiring them to leverage their unique potential and contribute positively to their communities. Our commitment to our students is encapsulated in our core values: Service, Accountability, Growth Mindset, and Excellence, which guide our educational approach and community interactions.

Operating across a diverse geographical region that includes San Bernardino, Inyo, Kern, Los Angeles, Orange, and Riverside. Sage Oak offers a unique balance of flexibility, accountability, and academic excellence. Our educational model emphasizes the importance of partnership between educators and families, ensuring that each student's personal academic goals are achieved through a tailored educational experience.

Sage Oak is dedicated to harnessing the power of flexible learning environments and advanced educational technologies to cater to a wide range of learners. Our approach is characterized by personalized learning pathways that accommodate students' diverse backgrounds and aspirations, providing them with a stimulating and supportive alternative to traditional education models. Through the integration of a varied curriculum, individualized support, and high academic standards, Sage Oak fosters an environment where students are encouraged to become self-motivated, competent, lifelong learners poised to make a meaningful impact in their communities. Sage Oak's student input is comprehensive, spanning academics, well-being, testing, and targeted populations. This data set is a cornerstone for school improvement.

Our educational philosophy prioritizes the development of open, curious, and alert minds, preparing students to thrive in any learning situation. By offering the flexibility to learn anytime and anywhere, combined with adaptable teaching and curricular models, Sage Oak empowers students to take ownership of their education. This approach equips them with not only the necessary knowledge and skills but also the confidence, creativity, and resourcefulness to navigate the challenges and opportunities of the 21st century.
As of the most recent data reporting period, Sage Oak serves a vibrant and diverse student body, with enrollment reflecting a broad spectrum of cultural and socio-economic backgrounds. Our commitment to inclusivity and excellence is evident in our dedicated staff, innovative programs, and the supportive community that makes Sage Oak a leader in personalized education.

Based on the Fall 1 Census data reporting on October 1, 2025, to be reported on the California Dashboard, there were 4180 students enrolled. Other student groups are as follows: 54.9% are classified as Socioeconomically Disadvantaged (SED). Students with Disabilities (SWD) make up 10.33% of the population, and English Learners (EL) make up 2.1%. The ethnic diversity of Sage Oak includes students who are White (37.9%), Hispanic (44.5%), Two or More Races (6.7%), Asian (4.7%), African American (3%), Filipino (1.5%), American Indian/Alaskan Native (.4%), and Native Hawaiian/Other Pacific Islander (.2%).

Reflections: Annual Performance

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

Reflecting on Sage Oak's annual performance through the California School Dashboard and local data reveals both notable strengths and areas for continued growth. Sage Oak performs above the state in all Dashboard indicators, demonstrating the strength of its academic program and overall support systems. Key areas of success include high graduation rates and strong college and career readiness, as well as very low rates of chronic absenteeism, suspension, and expulsion. These outcomes reflect a safe, supportive, and engaging learning environment for students.

At the same time, state and local data highlight ongoing challenges in academic performance for specific student groups, particularly English Learners (EL), Students with Disabilities (SWD), and Socioeconomically Disadvantaged (SED) students. While SED performance increased in both English Language Arts and Mathematics, this student group remains an area of focus.

English Learners showed growth in Mathematics and maintained performance in English Language Arts, with ELPAC scores increasing by 16.2%—moving the dashboard indicator from Red to Blue. However, achievement levels for English Learners remain low overall and still require targeted support, particularly in language development and differentiated instruction. Mathematics continues to be a significant area of need, especially for Students with Disabilities, whose performance remains in the Red on the dashboard, indicating a critical need for intensive intervention and support.California School Dashboard Analysis

ELA Distance from Standard (DFS):

- Overall : 3.4
- EL: -52.3
- SWD: -68
- SED: -15.6

Math DFS:
- Overall: -27.9
- EL: -63.5
- SWD: -103.1
- SED: -48.8

Chronic Absenteeism: 1.7%
Graduation Rate: 96.4%
Suspension: 0%
Expulsion: 0%
College and Career Readiness: 59.6% (High)
EL Progress (ELPI): 56.9%

iReady Local Assessment Analysis
ELA (on or above grade level):
- Overall : 67%
- EL: 36%
- SWD:33%
- SED: 62%
- Foster (3 students): 67%
- Homeless : 60%

Math (on or above grade level):
- Overall: 60%
- EL: 34%
- SWD: 27%
- SED: 54%
- Foster (3 students): 67%
- Homeless : 47%

In response to these outcomes, Sage Oak continues to align its improvement efforts to its LCAP goals. Strategic actions include targeted interventions, expanded professional development opportunities, integration of advanced technologies, and personalized learning pathways to better meet individual student needs. In addition, the school remains focused on strengthening college and career readiness pathways so that students are well prepared for future academic and career opportunities. This comprehensive approach is intended to improve outcomes for all students, with a particular emphasis on those student groups requiring additional academic and social-emotional support.
Learning Recovery Emergency Block Grant (LREBG) and Title I, Part A
Sage Oak utilized unexpended Learning Recovery Emergency Block Grant (LREBG) funds for the 2025–26 school year. Additionally, LREBG and Title I, Part A funded actions can be found in Goal 1, Action 2; Goal 1, Action 5; and Goal 2, Action 4. A review of state and local data, along with stakeholder engagement feedback, indicates an ongoing need to strengthen Multi-Tiered System of Supports (MTSS) and counseling services for qualifying students. These efforts are intended to maintain small teacher-to-student ratios and address the

engagement and academic needs of all student groups.
During this school year, Sage Oak used these funds to support the hiring of reading specialists and an intervention teacher. The school has strategically invested LREBG and Title I, Part A funding to expand staff capacity and strengthen intervention programs and resources for students, particularly in English Language Arts and Mathematics through small-group instruction. These actions align with allowable uses of funds in the areas of staff hiring and professional support and are designed to improve access, intervention, and academic outcomes for students in need of additional support. See action descriptions for additional details.

Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

n/a

Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

n/a

Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

n/a

Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

n/a

Engaging Educational Partners

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Educational Partner(s)	Process for Engagement
Parent Advisory Committee	The Parent Advisory Committee (PAC) played a pivotal role in shaping the Local Control and Accountability Plan (LCAP) by participating in key meetings on October 2, 2025; December 4, 2025; January 15, 2026; and May 7, 2026. These meetings fostered open dialogue and provided valuable opportunities for parents to learn, share insights, and offer thoughtful feedback. Throughout the year, parents engaged in discussions and contributed input on a range of key initiatives, including the launch of Power Standards, Sage Oak's Safety Plan, the English Learner Program, the counseling program, and the Program for Advanced and Gifted Education (PAGE). They also provided feedback on technology support efforts, including the introduction of new Chromebooks and the Self-Help IT Portal. In addition, parents reviewed and provided input on the LCAP mid-year and end-of-year reports, as well as the local indicators presentation, helping ensure the plan reflects the needs and priorities of the school community.
English Learner Advisory Committee	The English Learner Advisory Committee (ELAC) made contributions to the development of the LCAP through key meetings held on October 2, 2025; December 4, 2025; January 15, 2026; and May 7, 2026. Their input focused on improving educational outcomes for English Learners, with an emphasis on academic achievement through data-driven results, language proficiency, and equitable access to educational opportunities. Committee members recommended organizing study groups, expanding the use of online resources, celebrating students who reclassify, and promoting the

Educational Partner(s)	Process for Engagement
	benefits of English Language Development (ELD) programs. Additionally, the committee emphasized the importance of parent involvement, teacher training, and the expanded use of technology. These recommendations helped inform the LCAP and strengthen its responsiveness to the needs of English Learners.
Student Advisory Committee	The Student Advisory Committee (STAC) played a meaningful and collaborative role in supporting the development of the LCAP through active participation in meetings on October 2, 2025; December 4, 2025; January 15, 2026; and May 7, 2026. These meetings fostered open dialogue and provided valuable opportunities for students to learn, share insights, and offer thoughtful feedback. Throughout the year, students contributed input on a range of key initiatives, including the launch of Power Standards, the introduction of new Chromebooks and the Self-Help IT Portal, the counseling program, the Program for Advanced and Gifted Education (PAGE), and key LCAP topics such as student supports, school safety, technology access, and college and career readiness. Students also participated in a Chromebook trial to help ensure that devices are appropriate across grade levels and support a variety of learning needs and uses. In addition, students provided feedback on the LCAP mid-year and end-of-year reports, as well as the local indicators presentation, helping ensure the plan reflects the needs and priorities of the school community.
Parents, Students, Teachers, Staff	In the development of the LCAP, a comprehensive approach was employed to engage parents, staff, and students, ensuring their voices were integral to the plan. This inclusive process utilized various survey platforms, such as Parsec Reals survey platform, to gather in-depth feedback including an AI-led interview regarding parent input. "Question of the Month" surveys were instrumental in capturing ongoing input, while educational partner surveys provided broader insights into the needs and perspectives of the school community. Additionally, climate surveys were conducted to understand the overall environment and satisfaction levels within the educational setting. This multifaceted engagement strategy ensured a diverse range of feedback, which was crucial in shaping a well-rounded and effective LCAP.
Principals, Leadership, Administrators	Principals, the leadership team, and administrators played an essential role in shaping the LCAP by engaging in strategic planning

Educational Partner(s)	Process for Engagement
	and collaborative review throughout the year. Through regular "Question of the Month" surveys, leadership gathered valuable staff feedback that provided important insights for informed decision-making and continuous improvement. In addition, during key meetings held on May 8, 2025; September 3, 2025; October 1, 2025; October 30, 2025; November 12, 2025; January 14, 2026; February 4, 2026; and April 15, 2026, the leadership team participated in both half-day and full-day sessions focused on examining the school's specific needs, analyzing student achievement data, reviewing feedback from educational partners, and developing and monitoring the annual strategic plan as it relates to the LCAP. These sessions were critical to aligning the LCAP with the school's broader goals and ensuring the plan remained responsive, strategic, and grounded in data. Leadership also used these opportunities to review progress toward LCFF priorities and assess how schoolwide initiatives and resource decisions support student outcomes. This collaborative and methodical approach helped ensure a well-structured LCAP that reflects the diverse needs of the student body and supports continuous improvement across the organization.
Title 1 Parents/Guardians	In the development of the LCAP, Sage Oak Charter Schools prioritized meaningful engagement with Title I parents and guardians through a range of outreach and participation opportunities grounded in its Parent and Family Engagement Policy. One key activity was the annual Title I Parent/Guardian Information Meeting, held virtually during the Parent Summit on August 11, 2025, to maximize accessibility for families. Parents were also invited to participate in quarterly ELAC meetings, English Language Proficiency Assessments for California (ELPAC) information sessions in November, and intervention class information sessions in September. These meetings created opportunities for two-way communication, allowing families to learn more about Title I services, ask questions, and provide input on school programs and student needs. Sage Oak also offered a flexible range of engagement opportunities, including recorded sessions, parent and guardian webinars, and a school-parent compact process that invited family feedback.

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Educational Partner(s)	Process for Engagement
	Together, these efforts helped foster an inclusive and supportive school culture. Through ongoing communication, such as personalized emails, the weekly Sage News, and targeted outreach to families of Title I students, Sage Oak worked to ensure that parents remained informed and meaningfully involved in their child's education. These strategies reflect Sage Oak's continued commitment to strong family-school partnerships and to ensuring that parent voice helps inform educational priorities, support academic success, and strengthen outcomes for students.
Community Partners	In the development of the LCAP, the school's partnership with Parsec Education marked a significant enhancement in strategic planning and program evaluation. Parsec Education's expertise was particularly instrumental in developing 'Street Data Metrics,' a set of advanced, nuanced measures designed to provide a deeper understanding of educational impact and student outcomes. This collaboration represents a commitment to incorporating expert external insights and data-driven methodologies into the LCAP. The involvement of Parsec Education not only introduced innovative perspectives to the planning process but also ensured that the evaluation of programs was thorough and reflective of real-world educational scenarios. This partnership, especially in the development of these tailored 'Street Data Metrics,' underscores the school's dedication to employing comprehensive, expert-driven strategies to achieve its educational goals and enhance the overall learning experience.

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

The adopted LCAP for Sage Oak Charter School was meaningfully shaped by feedback gathered throughout the year from parents, students, staff, leadership, Title I families, advisory committees, and community partners. Input from the PAC, ELAC, STAC, and the newly added Sage Connections committee helped confirm the importance of maintaining strong systems for communication, student support, and school connectedness. Educational partners consistently emphasized the value of meaningful opportunities for involvement, high-quality counseling and social-emotional supports, safe and respectful learning environments, improved onboarding for new students, strong technology access and support, and continued attention to college and career readiness. Parent and student feedback also informed decisions related to Power Standards, the English Learner Program, the counseling program, PAGE, new Chromebooks, the Self-Help IT Portal, and other efforts designed to improve access, responsiveness, and the overall student experience. Mid-year reporting also reflected

that Sage Oak's engagement work included PAC, STAC, ELAC, and Sage Connections, as well as targeted events and expanded opportunities for connection across the school community.

The LCAP was also influenced by broader survey and planning data collected through Parsec Reals, Question of the Month surveys, climate surveys, staff feedback tools, and strategic planning sessions with principals, leadership, and administrators. These data sources helped the school identify both strengths and areas for refinement, including the continued need to strengthen multilingual learner access, improve math support through engaging formats and tutoring, expand live and synchronous instructional quality, and build out college and career readiness experiences and community connection opportunities. Feedback from staff and leadership also supported continued investment in professional development, operational efficiency, technology integration, and systems that improve service delivery while preserving Sage Oak's relationship-based model. In addition, educational partner feedback reinforced the value of events, engagement opportunities, and experiential learning experiences that help students build connection, explore interests, and access college and career pathways. Together, this feedback ensured that the adopted LCAP remained responsive, data-informed, and aligned to the priorities most clearly expressed by the school community.

Ultimately, Sage Oak's LCAP reflects a collaborative, transparent, and evolving strategy designed to meet the diverse needs of its learners. Through intentional and recurring engagement with families and staff, Sage Oak continues to position itself as a leader in personalized, inclusive education—preparing all students, especially those with the greatest needs, to thrive academically and personally.

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Goals and Actions

Goal

Goal #	Description	Type of Goal
1	Student Outcomes: Academic Achievement and College and Career Readiness 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.	Broad Goal

State Priorities addressed by this goal.

Priority 1: Basic (Conditions of Learning)
Priority 2: State Standards (Conditions of Learning)
Priority 3: Parental Involvement (Engagement)
Priority 4: Pupil Achievement (Pupil Outcomes)
Priority 5: Pupil Engagement (Engagement)
Priority 6: School Climate (Engagement)
Priority 7: Course Access (Conditions of Learning)
Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

At the heart of this goal lies a commitment to holistic education. Through its standout programs, Sage Oak not only offers an excellent academic foundation but also fosters a love for learning and a commitment to serving the community. These programs are designed to be immersive, innovative, and integrated, ensuring that every student gets a chance to shine and find their passion. Whether it's through advanced academic curricula, extracurricular activities, or real-world application projects, the objective is clear: to produce graduates who are not only academically adept but also critical thinkers, problem solvers, and community leaders.

At Sage Oak, our commitment to data informed practices drives our focus on tangible academic achievements and readiness. Currently, 52% of our high school students have completed A-G requirements. With that and only a small number of students completing CTE pathways, our strategies include enhancing college and career readiness support through high school counselors and the development of additional CTE pathways. Sage Oak also specifically tailors its educational approach to support socio-economically disadvantaged students, English Learners, foster youth, and students with disabilities. For our socio-economically disadvantaged students and students with disabilities, CAASPP scores and iReady growth show a need for improvement. In addition, since 47% of students with disabilities are 2 or more grade levels below in iReady Math, and only 56.9% of English Learners progressed in proficiency as measured by ELPAC with a 27%

reclassification rate, an improvement from last year but still a drop from our baseline percentage, our efforts are geared towards ensuring all students reach their fullest potential. With the further development of our AVID program and increasing participation in synchronous instruction, professional development opportunities and a specific focus on supporting our LTELS and students qualifying for intervention, we aim to lift these scores.

By embedding education within immersive, innovative, and integrated programs, and utilizing the Learning Recovery Emergency Block Grant (LREBG) and Title 1-A funds with increased staffing, this goal directly supports all students, enhancing their academic proficiency, critical thinking, college and career readiness, and leadership skills. This inclusive strategy demonstrates Sage Oak's commitment to equitable, high-quality educational opportunities, ensuring all students have the resources and support needed to succeed.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.1	Completion of A-G Requirements: % of students successfully completing the A-G requirements	39.1% Source: Dataquest 22-23	51.1%	51.82%	44.%	12.72%
1.2	Career Technical Education (CTE) Pathway Completion # of students completing CTE pathways	2 students Source: Dataquest 22-23	2 students	5 students	30 students	3 students
1.3	Percentage of Students Achieving a Score of 3 or Higher on AP Exams	72% Source: College Board 22-23	100%	73%	70% or higher	1%
1.4	College and Career Indicator (CCI) Performance	56.9% Source: CA Dashboard 22-23	59.6%	59.8%	62%	1.9%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	% of students considered college and career prepared according to the CA Dashboard					
1.5	Graduation Rate Maintenance % of graduated students on the CA Dashboard	92% Source: CA Dashboard 22-23	96.5%	96.4%	80% or higher	4.4%
1.6	Maintenance of Low Middle School Dropout Rates # of middle school dropouts	0.39% Source: Internal 22-23	.52%	.22%	0	-.17%
1.7	Maintenance of Low High School Dropout Rates % of high school dropouts according to DataQuest cohorts	2% Source: Dataquest 22-23	1.42%	2.2%	2% or less	.2%
1.8	Expansion of K-8 Live Synchronous Instruction Courses Aligned with CTE Pathways # of K-8 synchronous course offerings that align with the CTE pathways	79 course offerings Source: Internal 22-23	198 course offerings	280 course offerings	200 course offerings	201

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Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.9	Performance in iReady Assessments for ELA and Math % of students achieving at or above grade level in iReady assessments for English Language Arts (ELA) and Mathematics	Math- 55% ELA -65% Source: i-Ready 23-24 Spring	Math- 56% ELA -66%	Math - 60% ELA - 67%	Math- 58% ELA -68%	Math 5% ELA 2%
1.10	California Assessment of Student Performance and Progress (CAASPP) Achievement % of students who have met or exceeded standards in CAASPP assessments for English Language Arts (ELA) and Mathematics	Math- 37.95% ELA -54.32% Source: Dataquest 22-23	Math - 37.65% ELA - 49.53%	Math - 40.54% ELA - 52.43%	Math- 41% ELA -57%	Math 2.59% ELA 2.68%
1.11	CAASPP Performance for Socio-Economically Disadvantaged (SED) Students % of socio-economically disadvantaged students meeting or exceeding CAASPP standards in English Language Arts (ELA) and Mathematics	Math- 28.99% ELA- 43% Source: Dataquest 22-23	Math - 28.55% ELA-41.31%	Math - 32.24% ELA -44.73%	Math- 31% ELA- 46%	Math 3.25% ELA 1.73%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.12	Accessibility to Instructional Materials % of students with full access to necessary instructional materials	100% Source: SARC 23-24	100%	100%	100%	0%
1.13	Alignment with State Standards % of students whose education is fully aligned with state standards	100% Source: SARC 23-24	100%	100%	100%	0%
1.14	Community Belief in Robust Curriculum % of parents, students, and staff who believe that students have access to a challenging and comprehensive curriculum supported by resources that enable them to meet and exceed grade-level standards in core content areas.	Parents- 98% Students- 98% Staff- 99% Source: Internal 23-24	Parents - 98% Students - 97% Staff - 94%	Parents - 98% Students -98% Staff - 97%	Parents- 90% or higher Students- 90% or higher Staff- 90% or higher	Parents 0 Students 0 Staff -2%
1.15	Growth in ELA and Math Among Intervention Students % of students receiving interventions who demonstrate growth equivalent to one year or	Math- 56% ELA- 40% Source: Internal 22-23	Math - 56% ELA - 53%	Math - 58% ELA - 56%	Math- 61% ELA- 45%	Math 2% ELA 16%

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Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	more in English Language Arts (ELA) and Mathematics					
1.16	Increased Participation Rate in Math Interventions for Students with Disabilities (SWD) # of SWD participating in math intervention programs	54% Source: Internal 23-24	64%	66.2%	60%	12.2%
1.17	Increased iReady Math Achievement for Students with Disabilities (SWD) Decrease % of SWD in Tier 3 in iReady math assessments	49% Source: i-Ready 22-23	50%	47%	46%	-2%
1.18	Improved CAASPP Performance for SWD in Math Achievement Increase in DFS in Math for SWD 3 points annually	-102.7 DFS Source: CA Dashboard 22-23	-100.6 DFS	-103.1 DFS	-93 DFS	-.4
1.19	Increased Teacher Preparedness for Student Articulation	78% Source: Internal 23-24	98%	97%	90% or higher	19%

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Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	% of teachers who feel equipped to effectively prepare and transition their students to the next grade level band					
1.20	Increased Progress Toward English Proficiency % of English learners making progress toward English proficiency, as measured by the English Language Proficiency Assessments for California (ELPAC).	60% Source: CA Dashboard 22-23	40.7%	56.9%	65%	-3.1%
1.21	Increased English Learner Reclassification Rate % reclassification rate of English learners	38% Source: Internal 22-23	18%	27%	41%	-11%
1.22	Maintain Participation in ELD Synchronous Instruction	67% Source: Internal 23-24	93%	93%	75%	26%
1.23	Maintain Belief That EL Students Have Access to Resources % of parents, students, and staff affirming	Parents- 100% Students- 87% Staff- 78%	Parents - 100% Students - 95% Staff - 93%	Parents - 100% Students - 94% Staff - 97%	Parents- 90% or higher Students- 90% or higher	Parents 0 Students 7% Staff 19%

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Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	access to a variety of resources effectively supporting English Learner students' achievement	Source: Internal 23-24			Staff- 90% or higher	
1.24	% of LTEL students making progress toward English proficiency as measured by ELPAC ELPI levels	40% Source: CA Dashboard 23-24	N/A (metric added year one)	52.4%	45%	12.4%
1.25	Increased number of professional development opportunities supporting ELD and LTEL instruction	1 Source: Internal 24-25	N/A (metric added year one)	6	6	5

Goal Analysis [2025-26]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Academic Achievement: Advancing Student Outcomes Through Pathways, Targeted Support, and Instructional Alignment

During the 2025–26 school year, Sage Oak continued implementation of Goal 1 with a focus on improving academic achievement, college and career readiness, personalized intervention, math support for students with disabilities, articulation across grade spans, and English Learner progress. Implementation remained aligned with the planned actions and reflected the school's continued commitment to preparing students for success through comprehensive K–12 pathways, data-informed supports, and responsive instructional practices. Core efforts included integrating career, community, and life skills into student pathways, refining a personalized multi-tiered system of support, expanding math intervention for students with disabilities, strengthening articulation across grade bands, and increasing support for English learners and long-term English learners.

A major success in implementation was the school's continued effort to carry out all five planned actions in a coordinated way. College and career readiness work included increased focus on decisions after high school graduation, expanded college and career week experiences,

career spotlight opportunities, financial literacy learning, and pathways-based course offerings. Live synchronous instruction directly aligned to CTE pathways continued to expand significantly, helping students connect their interests and future goals to available coursework. Sage Oak also continued to strengthen its academic systems through the use of Power Standards, Quick Checks, evaluation of core curriculum, and the Professional Development Passport, all of which supported stronger alignment, more consistent instructional expectations, and improved teacher capacity. Sage Oak's recognition on the ERP (Educational Results Partnership) Honor Roll also highlights the strength of the school's academic program and reinforces that the systems and supports implemented under Goal 1 are contributing to a culture of high expectations, strong achievement, and college and career readiness. I-Ready local assessment results also showed meaningful academic progress, with Math increasing from a 55% baseline to 60% in Year 2 and Reading increasing from a 65% baseline to 67% in Year 2, indicating that Sage Oak is making steady progress toward its three-year goal of increasing performance by 3 percentage points from baseline. Intervention and support systems also expanded through additional staffing, including added math support in grades 3–5 and high-dose tutoring for high school algebra students. These combined efforts helped reinforce a schoolwide focus on academic growth, access, and readiness.

Implementation also revealed several important areas for continued refinement. Although many college and career readiness outcomes remained strong, CTE pathway completion remained below the long-term target, and staffing changes affected pathway participation in Art, Media, and Entertainment. College preparedness indicators also continue to be influenced by the high number of 11th-grade transfer students, which presents a challenge for CCI performance. In Action 3, participation in math interventions for students with disabilities increased, but achievement results remained mixed, suggesting that increased access alone has not yet translated into consistent growth in performance.

English Learner outcomes also showed meaningful progress across the cycle, with several important gains from baseline to Year 2 that place the school within reach of its three-year goals. Participation in English Learner Development (ELD) synchronous instruction increased substantially and remained well above target, while Long Term English Learner (LTEL) progress toward proficiency rose significantly and surpassed the Year 3 goal. Although ELPAC progress and reclassification rates remain below Sage Oak's three-year target, both showed improvement from Year 1 to Year 2, indicating positive momentum and the impact of strengthened supports.

Overall, Goal 1 was implemented successfully, with zero difference in planned and actual implementations including strong evidence of progress in college and career readiness structures, intervention systems, instructional alignment, and English learner supports. Taken together, the gains made from baseline to Year 2 suggest that the school is well-positioned to continue accelerating progress in the final year of the cycle. Ongoing community input, use of real-time data, and strategic design will ensure implementation evolves to meet the needs of all learners—preparing every student for college, career, and life success.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The school spent materially less on action 1.1 and 1.2 related to budgeted, but unfilled positions. The school spent materially more on action 1.3, which supports students with disabilities.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Overall Assessment: Effective to Highly Effective

The actions under Goal 1 have been effective to highly effective in making progress toward the goal of improving academic achievement, college and career readiness, intervention systems, articulation, and English learner support. Year 2 results show strong performance in graduation rate, A–G completion, AP exam pass rates, live CTE-aligned course access, intervention growth in ELA, access to instructional materials and standards, teacher articulation confidence, and English learner resource access. At the same time, a number of metrics show forward progress but remain below long-term targets, especially in CTE completion, CCI, math outcomes for some student groups, and EL progress indicators.

K–12 Pathways, College and Career Readiness, and Postsecondary Preparation – Effective with Areas of Strong Performance

This action has been effective in increasing access to college and career readiness opportunities and expanding pathways-based learning experiences for students. A–G completion increased from a baseline of 39.1% to 51.82% in Year 2, exceeding the Year 3 target of 44.1%. AP exam performance remained effective, with 73% of students attempting AP exams earning a score of 3 or higher, exceeding the target to maintain 70% or higher. Graduation rates also remained highly effective at 96.4%, well above the 90% target, and the middle school dropout rate improved substantially from .39% at baseline to .22% in Year 2. In addition, live synchronous instruction directly aligned with CTE pathways expanded from a baseline of 79 offerings to 280, exceeding the Year 3 target of 200 class offerings. These results suggest that Sage Oak has been highly effective in expanding access to academic and career-aligned opportunities for students.
At the same time, some related metrics show only forward progress or mixed results. CTE pathway completion increased from 2 students at baseline to 5 in Year 2, which reflects improvement but remains well below the target of 30 students. College and career indicator performance declined slightly from 59.6% in Year 1 to 58.8% in Year 2 and remains below the target of 62%, though still above baseline. High school dropout also increased to 2.2%, slightly above the goal to maintain 2% or less. These results suggest that this action is broadly effective, while also highlighting the need for continued focus on pathway completion, support for transfer students, and stronger alignment between pathway participation and postsecondary readiness outcomes.

Personalized, Data-Informed Multi-Tiered System of Support – Effective to Highly Effective

This action has been effective to highly effective in strengthening access to challenging curriculum, intervention supports, and academic growth systems. Access to instructional materials and state standards remained at 100%, and perception data remained very strong, with parents, students, and staff continuing to report that students have access to a robust and challenging curriculum supported by resources across core content areas. Intervention outcomes also showed positive results, particularly in English Language Arts, where the percentage of intervention students growing one year or more increased from a baseline of 40% to 56% in Year 2, exceeding the target of 45%. Math intervention growth also increased from 56% at baseline to 58%, reflecting continued progress toward the Year 3 target. These outcomes indicate that Sage Oak's intervention model continues to provide meaningful support to students and is contributing positively to growth.
CAASPP outcomes showed mixed but generally positive progress, and California's new growth model provides important additional context. Overall student growth was rated Average in both ELA at 73.5% and Math at 67.7%. Within that overall picture, several student groups demonstrated especially strong results. In ELA, African American students demonstrated Exceptional growth at 88.9%, and Hispanic students demonstrated Accelerated growth at 75.3%. In Math, English learners demonstrated Accelerated growth at 78%, African American

students at 77.8%, Asian students at 76.6%, and Filipino students at 68.8%. These subgroup results suggest that Sage Oak's supports are helping several student groups make strong progress, even when broader proficiency outcomes still reflect areas for continued improvement. At the same time, the growth model identified a continued area of need in Math for students with disabilities, whose growth was rated Moderate at 64%, reinforcing the importance of ongoing refinement in targeted math support for this group.
State assessment proficiency data also reflected positive movement in several areas. CAASPP Math performance improved from 37.95% at baseline to 40.54% in Year 2, and socioeconomically disadvantaged students improved in Math from 28.99% to 32.24%. ELA performance remained slightly below baseline overall at 52.43% compared to 54.32%, though it improved from Year 1, and socioeconomically disadvantaged students exceeded baseline in ELA at 44.73% compared to 43%.Updated i-Ready local assessment results provide additional evidence of progress under this action. In Math, the percentage of students performing at or above grade level increased from a baseline of 55% to 60% in Year 2, already surpassing the three-year target of 58%. In Reading, the percentage of students performing at or above grade level increased from a baseline of 65% to 67% in Year 2, reflecting continued progress toward the three-year target of 68%. These local assessment results reinforce that Sage Oak's multi-tiered system of support is contributing to improved academic performance and helping place the school within reach of its long-term growth goals.
Overall, this action is effective to highly effective, with strong evidence that Power Standards, ongoing core curriculum evaluation, the growing PAGE program, expanded intervention staffing, and high-dose tutoring are contributing to greater instructional consistency and academic growth. In addition, project-based learning was established and implemented this year for PAGE students, further enriching learning experiences through deeper engagement, critical thinking, and application of skills. The California growth model adds important context to these results, showing encouraging progress in ELA across multiple student groups and accelerated or exceptional growth for several student groups in both ELA and Math. At the same time, the data also make clear that broader Math outcomes, particularly for some student groups, still require continued refinement, targeted support, and sustained attention in the final year of the cycle.

Math Proficiency for Students with Disabilities – Effective with Continued Need for Refinement

This action has been effective in increasing access to math interventions for students with disabilities, but the impact on achievement outcomes remains mixed. The percentage of students participating in math interventions increased from 54% at baseline to 66.2% in Year 2, exceeding the target of 60%. This indicates successful implementation in expanding access and participation. However, i-Ready math achievement for students with disabilities in Tier 3 declined slightly from 49% at baseline to 47% in Year 2, although this still exceeds the Year 3 target of 46%. CAASPP distance from standard in math for students with disabilities worsened slightly from -102.7 at baseline to -103.1 in Year 2 after improving in Year 1. These results suggest that while the action has been effective in increasing participation and maintaining some benchmark measures, the school has not yet seen consistent improvement in overall math achievement for students with disabilities. Continued refinement of intervention design, intensity, and alignment will remain important.

Articulation Across Grade Bands – Highly Effective

This action has been highly effective. Teacher confidence in articulating expectations and preparing students for the next grade span increased from a baseline of 78% to 97% in Year 2, exceeding the target of 90%. Notes from implementation indicate that examining data in PLCs and increasing cross-grade-level and grade-band collaboration have contributed to this growth. These results suggest that Sage Oak has made strong progress in developing a more unified and data-informed articulation process that supports smoother transitions across grade levels.

English Learner and LTEL Progress – Effective with Forward Progress

This action has been effective with forward progress. Participation in ELD synchronous instruction increased from a baseline of 67% to 93% in both Year 1 and Year 2, exceeding the target of 75%. Resource access for English learner families and staff also remained strong, with Year 2 results at 100% for parents, 94% for students, and 97% for staff, all above the target of 90%. LTEL progress toward proficiency increased significantly from 40% to 52.4%, exceeding the target of 45%, and the number of professional development opportunities supporting ELD and LTEL instruction increased from 1 to 6, meeting the target. These outcomes indicate meaningful growth in instructional support, participation, and resource access for English learners.
Implementation evidence also helps explain the progress made under this action. Parent engagement in support of live instruction increased, with 42.6% parent submissions and 56.9% student submissions, reflecting a growing investment in English learner participation and support. During 2025–26, staff engaged in six targeted professional development opportunities supporting EL and LTEL instruction, including three Summit trainings, two virtual PLCs, and one teacher ELPAC bootcamp. Feedback from families and staff reinforced the value of smaller-group instruction, flexible tutoring, dedicated ELD and intervention classes, and continued access to school-provided online programs and learning apps. Staff professional learning also emphasized strengthening the home-school partnership, prioritizing small-group ELD instruction, curating visual supports, and increasing the systematic use of scaffolds such as sentence frames and word banks to build student confidence and academic language. Taken together, these implementation efforts suggest that the school has built a stronger and more coherent support system for English learners, which is contributing to the gains seen in participation, LTEL progress, and resource access.
At the same time, English learner progress toward proficiency and reclassification rates remain below target. ELPI increased from 40.7% in Year 1 to 56.9% in Year 2, showing notable recovery and meaningful progress toward the three-year goal of 65%. Reclassification also improved from 18% in Year 1 to 27% in Year 2, though it remains below the target of 41% and below baseline. These results suggest that the action is moving in a positive direction and that the significant gains made from Year 1 to Year 2 place the school within reach of its three-year goals. Continued focus on small-group instruction, flexible tutoring, dedicated ELD classes, family partnership, and targeted teacher training will be important to sustaining this momentum.

Conclusion

Overall, the actions under Goal 1 have been effective to highly effective in making progress toward the goal. The strongest areas of impact include A–G completion, graduation rate, AP success, expansion of live CTE-aligned coursework, access to curriculum and standards, intervention growth in ELA, articulation across grade bands, and English learner participation and resource access. In particular, the school has made meaningful gains from baseline to Year 2 in several areas, suggesting that its three-year goals remain within reach. English learner outcomes, while still below target in overall proficiency and reclassification, show clear forward momentum through strong ELD participation, significant LTEL growth, expanded professional development, and stronger family and instructional supports. The main areas requiring continued refinement are CTE pathway completion, CCI, certain math outcomes, and acceleration of English learner proficiency and reclassification. Taken together, these results show that Goal 1 actions are producing meaningful positive outcomes and are building a strong foundation for continued growth in the final year of the cycle. Continued use of formative data, targeted professional development, and engagement with educational partners are essential to improving outcomes across all student groups in the remaining years of this LCAP cycle.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Based on reflection on prior practice, no major changes were made to the overall structure of Goal 1. The goal, metrics, target outcomes, and actions remain relevant and aligned with Sage Oak's identified needs related to academic achievement, college and career readiness, intervention, articulation, and English learner support. However, Year 2 results indicate the importance of continuing to strengthen specific areas, particularly CTE pathway completion, college and career preparedness, math outcomes for students with disabilities, and English learner proficiency and reclassification.

For the coming year, Sage Oak will continue refining implementation by building on initiatives that have supported progress to date, including Power Standards, evaluation of core curriculum, expanded intervention staffing, and targeted English learner professional development. Additionally, Sage Oak will continue refining implementation by expanding internal CTE capstone and internship opportunities, pursuing stronger AP access, increasing professional development for math and English learner instruction, and intensifying tiered supports for all students. The school will also continue emphasizing small-group instruction, flexible tutoring, synchronous ELD participation, and shared instructional strategies across teams to accelerate outcomes for all students. Next year, Sage Oak will require all teachers to complete recorded EL training, providing specialized professional development for ELD teachers, and expanding instructional supports designed specifically for EL and LTEL students. These refinements are intended to preserve strong systems already in place while addressing the areas that remain below target.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
1.1	Integration of Career, Community, and Life Skills	Integrate career, community, and life skills into comprehensive K-12 pathways. This action is dedicated to integrating career, community, and life skills within comprehensive K-12 pathways. It focuses on equipping students with the essential capabilities needed to navigate their future careers and community life successfully. By weaving these skills into the curriculum, we aim to ensure students are academically prepared and possess the practical skills required for the modern workforce and societal participation. This initiative prioritizes equitable opportunities for all students, emphasizing support for unduplicated students, to lay the groundwork for successful transitions to higher education and careers. Metrics for Effectiveness:	$52,946,905.00	Yes

Action #	Title	Description	Total Funds	Contributing
		1.1 Completion of A-G Requirements: The total number of students successfully completing the A-G requirements, indicating readiness for university admission. 1.2 Career Technical Education (CTE) Pathway Completion: The quantity of students completing CTE pathways, reflecting vocational engagement and preparedness. 1.3 Percentage of Students Achieving a Score of 3 or Higher on AP Exams: The proportion of students who attempt and succeed in Advanced Placement exams, demonstrating college-level academic proficiency. Percentage is reflective of participation as well as passing. 1.4 College and Career Indicator (CCI) Performance: Evaluation of students' readiness for post-secondary opportunities through the College and Career Indicator, assessing comprehensive preparedness for college and careers. 1.5 Graduation Rate Improvement: An increase in graduation rates, signifying the effectiveness of educational pathways in guiding students to complete their education. 1.6 Maintain Low Middle School Dropout Rates: A maintenance of low dropout rates at the middle school level, identifying early intervention points to maintain student engagement. 1.7 Maintain Low High School Dropout Rates: A maintenance of low dropout rates at the high school level, crucial for assessing the pathways' role in sustaining student engagement through graduation. 1.8 Expansion of Live Synchronous Instruction Courses Aligned with CTE Pathways: The expansion of live synchronous instruction courses that directly support CTE pathways, measuring the integration of career-oriented education within the academic curriculum. This action is crafted to not only achieve academic benchmarks but also to cultivate a comprehensive educational experience that thoroughly prepares students for both college and career trajectories.		
1.2	Refinement of Multi-Tiered System of Support	Refine a personalized, data-informed multi-tiered system of support. The focus of the services is on students from unduplicated and identified populations.	$5,029,286.00	Yes

Action #	Title	Description	Total Funds	Contributing
		This action aims to refine a personalized, data-informed multi-tiered system of support (MTSS) that caters to the unique needs of each student. By leveraging comprehensive data analysis and targeted interventions, we will enhance academic achievement and support emotional and social development. This approach is designed to ensure all students, especially those facing socio-economic challenges, receive the necessary support to excel academically. Metrics for Effectiveness: 1.9 Performance in iReady Assessments for ELA and Math: Proportion of students achieving at or above grade level in iReady assessments for English Language Arts (ELA) and Mathematics, indicating proficiency and readiness. 1.10 California Assessment of Student Performance and Progress (CAASPP) Achievement: Percentage of students who have met or exceeded standards in CAASPP assessments for Math and ELA, reflecting comprehensive academic achievement. 1.11 CAASPP Performance for Socio-Economically Disadvantaged (SED) Students: Percentage of socio-economically disadvantaged students meeting or exceeding CAASPP standards in Math and ELA, highlighting the effectiveness of targeted support. 1.12 Accessibility to Instructional Materials: Percentage of students with full access to necessary instructional materials, ensuring equity in learning resources. 1.13 Alignment with State Standards: Percentage of students whose education is fully aligned with state standards, promoting consistent educational quality. 1.14 Community Belief in Robust Curriculum: Proportion of parents, students, and teachers who believe that students have access to a challenging and comprehensive curriculum supported by resources that enable them to meet and exceed grade-level standards in core content areas. 1.15 LREBG Action Growth in ELA and Math Among Intervention This action has been revised to reflect the strategic use of Learning Recovery Emergency Block Grant (LREBG) and Title 1-A funds to expand staffing and improve teacher-to-student ratios within our intervention programs. By increasing instructional personnel, Sage Oak is able to provide more		

Action #	Title	Description	Total Funds	Contributing
		consistent, small-group, and individualized support for students receiving Tier 2 and Tier 3 interventions. This enhancement directly supports the academic progress of students performing below grade level, particularly those from unduplicated groups and students with disabilities. The goal of this action is to equip students with the skills and confidence needed to meet or exceed grade-level standards. By embedding additional instructional capacity through LREBG and Title 1-A funded staff, we aim to accelerate learning and ensure that a greater percentage of intervention students experience at least one year of academic growth annually. This action reinforces our commitment to equitable access to a robust, rigorous curriculum, supported by the necessary resources and targeted instruction to help all students thrive.		
1.3	Enhancement of Math Proficiency for Students with Disabilities	Improve math proficiency for students with disabilities by increasing the percentage of students with disabilities participating in math interventions. This action is dedicated to improving mathematics proficiency among students with disabilities by expanding their participation in specialized math intervention programs. Recognizing the unique challenges faced by these students, our targeted approach aims to elevate their math skills through personalized and adaptive learning strategies. By doing so, we endeavor to facilitate meaningful academic progress and reduce disparities in math achievement. Metrics for Effectiveness: 1.16 Participation Rate in Math Interventions: Increase in the percentage of students with disabilities participating in math intervention programs, aiming to ensure comprehensive access to support services tailored to their needs. 1.17 Increased iReady Math Achievement for Students with Disabilities (SWD): Measurement of the number of students with disabilities moving out of Tier 3 in iReady math assessments. Tier 3 represents students performing two or more years below grade level. While measuring achievement at or above grade level for this group may not be appropriate,	$590,511.00	No

Action #	Title	Description	Total Funds	Contributing
		monitoring their progress out of Tier 3 provides a meaningful indicator of improvement in math proficiency. 1.18 California Assessment of Student Performance and Progress (CAASPP) for SWD Math Achievement: Analysis of CAASPP math scores for students with disabilities to track advancements in state-standardized math achievement, with a focus on increasing the percentage of students meeting or exceeding math standards. This action underscores our commitment to inclusivity and equity in education by specifically addressing the needs of students with disabilities. Through targeted math interventions, we aim not only to improve math proficiency but also to foster a supportive learning environment that acknowledges and addresses the diverse needs of our student population.		
1.4	Unified Articulation Process Development	Create a unified, data-informed articulation process that smoothly transitions students through each grade band while integrating critical feedback from graduates. This action focuses on developing a unified, data-informed articulation process to ensure smooth transitions for students as they move through each grade band (e.g., from elementary to middle school, and middle school to high school). By integrating feedback from graduates and utilizing comprehensive data analysis, we aim to refine our educational pathways to better prepare students for the expectations and standards of their next academic phase. This process is designed to enhance communication between teachers across grade bands, ensure curriculum continuity, and address any potential gaps in student preparedness. Metrics for Effectiveness: 1.19 Teacher Preparedness for Student Articulation: The percentage of teachers who feel equipped to effectively prepare and transition their students to the next grade level band. This metric will be measured through targeted surveys asking teachers if they feel confident in their ability to communicate the expectations and standards of the next grade level, ensuring they have the resources and knowledge necessary to support their students' progression.	$0.00	No

Action #	Title	Description	Total Funds	Contributing
		By establishing a comprehensive articulation process that leverages both quantitative data and qualitative feedback from our educational community, this action aims to foster a more cohesive and supportive learning environment. It ensures that students are not only academically prepared for each transition but also that educators feel supported and equipped to guide them effectively through their educational journey		
1.5	Enhancing English Learner Proficiency and Reclassification	Increase the percentage of both EL and LTEL students making progress toward proficiency as measured by the state language proficiency assessment and increase English Learner reclassification rate by increasing participation with ELD synchronous instruction. This action concentrates on elevating the proficiency levels of English Learners and increasing their reclassification rates by providing greater access to synchronous instruction. Recognizing the critical role of language proficiency in academic success and integration, we aim to expand and enrich our English Language Development (ELD) and core subject synchronous instruction. This strategic enhancement, made also available through the use of Title 1-A funding, is designed to offer English Learners more opportunities for real-time interaction, feedback, and engagement, thereby accelerating their progress toward English proficiency and readiness for reclassification. Metrics for Effectiveness: 1.20 Progress Toward English Proficiency: Increase in the percentage of English Learners making progress toward English proficiency, as measured by the English Language Proficiency Assessments for California (ELPAC). 1.21 English Learner Reclassification Rate: Improvement in the reclassification rate of English Learners, indicating successful attainment of proficiency and readiness to transition out of ELD support programs. 1.22 Participation in ELD Synchronous Instruction: Maintenance or increase in participation rates in ELD synchronous instruction, ensuring	$0.00	Yes

Action #	Title	Description	Total Funds	Contributing
		English Learners have access to the dedicated support necessary for language acquisition. 1.24 Access to Supportive Resources for English Learners: Proportion of parents, students, and teachers affirming access to a variety of resources effectively supporting English Learner students' achievement, as revealed through targeted surveys. This metric gauges the adequacy and effectiveness of resources provided to support the language acquisition and academic success of English Learners. 1.25 Progress Toward English Proficiency: Increase in the percentage of LTELs making progress toward English proficiency, as measured by the English Language Proficiency Assessments for California (ELPAC) ELPI levels. 1.26 Increased number of professional development opportunities supporting ELD and LTEL instruction. Through targeted actions to enhance synchronous instruction and resource availability, this initiative aims to significantly improve the language proficiency and academic outcomes for English Learners, including LTELS, ensuring they are well-equipped to achieve reclassification and succeed in their broader educational journey.		

Goals and Actions

Goal

Goal #	Description	Type of Goal
2	Engagement: Fostering a Supportive and Engaging Learning Environment In order to enhance student, parent, and staff engagement, we will establish an environment that fosters connectedness and professional growth.	Broad Goal

State Priorities addressed by this goal.

Priority 1: Basic (Conditions of Learning)
Priority 3: Parental Involvement (Engagement)
Priority 5: Pupil Engagement (Engagement)
Priority 6: School Climate (Engagement)
Priority 7: Course Access (Conditions of Learning)
Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

Building on Sage Oak's strategic commitment, Goal 2 aims to cultivate a supportive and engaging learning environment by emphasizing the well-being and professional growth of our staff, alongside fostering stronger connections within our school community. This goal is rooted in the belief that the success of our educational mission is intertwined with the development and satisfaction of our educators and staff. By investing in comprehensive professional development, mentorship programs, and creating a nurturing work environment, we aspire to empower our educators. This empowerment is expected to cascade, enhancing the educational experience for students and fostering a sense of belonging and community alignment with Sage Oak's mission and vision.

Sage Oak's efforts are influenced by feedback from the WASC visiting committee and include specific action steps aimed at increasing opportunities for parent and student engagement, developing purposeful professional growth pathways for staff, enhancing live instruction through targeted professional development, and establishing a robust system for social and emotional support. These targeted actions demonstrate Sage Oak's balanced approach to educational excellence, ensuring every member of our community is supported to thrive.

Furthermore, these initiatives directly contribute to increased or improved services for our unduplicated student populations, including socio-economically disadvantaged students, English learners, foster youth, and students with disabilities. By creating a more engaging, supportive, and well-resourced learning environment, we aim to elevate the educational outcomes and well-being of these students, ensuring that our programs and resources are tailored to meet their specific needs and challenges. This aligns with our objectives to deliver equitable, high-quality educational opportunities, making significant strides in supporting all students, particularly those who require additional assistance, to achieve success and reach their full potential.

Through increased staffing funded by the Learning Recovery Emergency Block Grant (LREBG), Sage Oak is expanding access to social-emotional supports as outlined in Goal 2, Action 4. This targeted investment strengthens our ability to meet the diverse needs of all students, supporting their academic growth, social-emotional well-being, and readiness for future college and career pathways. This approach reflects Sage Oak's continued commitment to equitable, high-quality educational opportunities for every learner.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
2.1	Maintenance of Positive Community Engagement Perception % of parents, students, and staff that believe Sage Oak makes a significant effort to foster community engagement	Parents 99% Students 97% Staff 100% Source: Internal 23-24	Parents 85% Students 86% Staff 97%	Parents 94% Students 92% Staff 96%	Parents 90% or higher Students 90% or higher Staff 90% or higher	Parents -5% Students -5% Staff -4%
2.2	Maintain 100% Credentialed Teachers % of credentialed teachers	100% Source: Internal 23-24	100%	100%	100%	0
2.3	Maintenance of High Attendance Rate % of school attendance rates (ADA)	99.2% Source: Internal 23-24	99.3%	99.2%	98% or higher	0
2.4	Maintenance of Low Chronic Absenteeism % of chronic absenteeism	2.4% Source: CA Dashboard 23-24	1.5%	1.7%	Below 3%	-.7%

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Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
2.5	Maintenance of Low Suspension and Expulsion Rates % suspension and expulsion rates	Suspension- 0% Expulsion- 0% Source: CA Dashboard and Dataquest 22-23	Suspension - 0% Expulsion - 0%	Suspension - 0% Expulsion - 0%	Suspension- 0% Expulsion- 0%	Suspension 0% Expulsion 0%
2.6	Maintain Positive Connection to School's Mission % of the parents, students and staff that feel connected to the school's mission	Parents 90% Students 83% Staff 96% Source: Internal 23-24	Parents 90% Students 89% Staff 95%	Parents 92% Students 91% Staff 98%	Parents 90% or higher Students 90% or higher Staff 90% or higher	Parents 2% Students 8% Staff 2%
2.7	Increased Student Retention Rate student retention rate	65% Source: Internal 22-23	71%	75%	75%	10%
2.8	Maintain Positive School Climate % of the parents, students, and staff that feel the school prioritizes safety, value, and respect	Parents 98% Students 96% Staff 97% Source: Internal 23-24	Parents 90% Students 95% Staff 99%	Parents 98% Students 98% Staff 98%	Parents 90% or higher Students 90% or higher Staff 90% or higher	Parents 0% Students 2% Staff 1%
2.9	Confidence and Integration of New Strategies	100% Source: Internal 23-24	100%	90%	100%	-10%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	% of staff involved in the Leadership Pathway reporting increased confidence in their ability to embrace and apply new strategies within their roles					
2.10	Increased Retention Rates of Participating Staff retention rates of staff members who have participated in the professional development pathways	72% Source: Internal 23-24	83%	88%	80%	16%
2.11	Expansion of Professional Development Opportunities # of professional development opportunities offered to staff, focusing on live instruction	4 Source: Internal 23-24	6	20	10	16
2.12	Improved Staff Confidence in Job Performance % of staff who believe they are well-equipped by Sage Oak to perform their roles effectively	97% Source: Internal 23-24	97%	97%	90% or higher	0

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
2.13	Increased Awareness of Socio-Emotional Resources % of parents, students, and staff that report feeling informed about the social and emotional resources provided by Sage Oak	Parents- 89% Students- 89% Staff- 93% Source: Internal 23-24	Parents - 93% Students - 90% Staff - 94%	Parents - 92% Students - 91% Staff - 95%	Parents- 90% or higher Students- 90% or higher Staff- 90% or higher	Parents 3% Students 2% Staff 2%
2.14	Expansion of Synchronous Support Opportunities # of synchronous support groups or classes with counselors	23 Source: Internal 23-24	66	238	29	215

Goal Analysis [2025-26]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Engagement: Fostering a Supportive and Engaging Learning Environment

During the 2025–26 school year, Sage Oak implemented Goal 2 with a continued focus on fostering a supportive and engaging learning environment for students, families, and staff. Implementation remained closely aligned with the planned actions and centered on strengthening community connection, expanding staff development opportunities, improving live synchronous instruction, and increasing access to social-emotional supports. Throughout the year, the school prioritized meaningful opportunities for involvement and input, maintained strong communication with educational partners, and continued building systems that support both student belonging and staff effectiveness. Sage Oak also used LREBG funding to help sustain and expand counseling-related supports and real-time student services.

A major success in implementation was the school's ability to carry out all four planned actions in a coordinated way. Community connection efforts included advisory committees, events, communication structures, and ongoing opportunities for feedback. Professional growth efforts included leadership pathways, program-specific support, and an expanded professional development plan for live instruction that

incorporated staff feedback and practical application. Staff also engaged in the Professional Development Passport, a personalized and aligned menu of learning opportunities that allowed teachers and staff to deepen skills in areas most relevant to their roles. Feedback indicated that staff appreciated the opportunity to grow professionally and further develop their practice. This emphasis on staff support and development was also reflected in Sage Oak receiving Top Workplaces recognition, highlighting the school's success in creating a culture where staff feel valued and supported. Social-emotional support systems also grew substantially through increased counseling groups, targeted courses, and stronger communication about available resources. These combined efforts helped reinforce a school culture focused on connection, responsiveness, and support across programs and grade spans. An additional success was student retention, as Sage Oak reached its three-year retention target in Year 2. This suggests that the school's emphasis on belonging, connection, and student support is positively influencing students' persistence and overall experience.

Implementation also revealed areas for continued refinement. As the school expanded professional learning and student supports, staff feedback highlighted the importance of keeping training practical, differentiated, and relevant to specific roles and grade levels. Similarly, while connection and support systems continued to strengthen, the school recognized the need to maintain intentional focus on onboarding, trust-building, and sustained engagement over time.

Overall, Goal 2 was implemented successfully, with strong evidence that the planned actions are contributing positively to school climate, staff capacity, student support, and long-term student connection. These results show that Goal 2 actions are producing meaningful positive outcomes and are building a strong foundation for continued growth in the final year of the cycle.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The school spent materially less on action 2.1 related to budgeted, but unfilled positions, and on action 2.2 related to professional development. The school spent materially more on action 2.4 related to increased expenditures for social and emotional support.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Overall Assessment: Effective to Highly Effective

Overall, the actions under Goal 2 have been effective to highly effective in making progress toward the goal of fostering a supportive and engaging learning environment. Year 2 data show strong results in educational partner engagement, school climate, attendance, professional development, and social-emotional support systems. Several metrics have already met or exceeded the Year 3 target, while others demonstrate meaningful forward progress and will continue to be refined in the final year of the cycle.

Enhancing Community Connection Opportunities – Highly Effective

This action has been highly effective in increasing opportunities for involvement and maintaining a strong sense of connection across the school community. In Year 2, 94% of parents, 92% of students, and 96% of staff reported that Sage Oak makes a significant effort to provide opportunities for involvement and input. Connection to the school's mission was also highly effective, with 92% of parents and 91% of students reporting a positive connection to the mission. School climate results were especially strong, with 98% of parents, 98% of students,

and 98% of staff indicating that Sage Oak prioritizes a safe, respectful, and supportive learning environment. Attendance-related metrics were also highly effective, with attendance rates above 99% and chronic absenteeism remaining low at 1.7%. These outcomes suggest that Sage Oak's efforts to provide diverse and engaging opportunities for connection, maintain a supportive and responsive school culture, and ensure students feel safe, respected, and valued are having a meaningful positive impact.

Climate Survey Themes and Continued Refinement – Highly Effective with Clear Next Steps

Survey feedback also reinforces that students value continued access to in-person events, flexible scheduling and curriculum options, strong communication, and meaningful opportunities for input and involvement. Educational partners emphasized the importance of maintaining engaging events that strengthen students' sense of belonging, continuing practices that ensure staff are attentive and responsive to student needs, and sustaining comprehensive online safety measures that support student security in virtual learning environments. Feedback further highlighted the need to strengthen communication so students are aware of and able to access social-emotional and mental health resources, while also continuing to build trust with staff. Student retention showed effective with forward progress, increasing to 75% at Sage Oak and meeting the school's three-year target in Year 2. Taken together, these results suggest that the action has been highly effective overall, while continued attention to belonging, communication, student voice, and access to supports will help sustain and deepen these positive outcomes.

Professional Growth Pathways – Effective with Forward Progress

Professional Growth Pathways have been effective with forward progress. In Year 2, 90% of staff participating in leadership pathways reported confidence in implementing new strategies. While this reflects a decline from prior levels, it still indicates a strong level of confidence and continued positive impact. At the same time, retention rates for staff participating in leadership pathways increased to 88%, demonstrating that the program continues to support staff development and long-term investment in leadership capacity. These results are further supported by Sage Oak's recognition as a Top Workplace, reflecting the school's success in creating a culture where staff feel valued and supported. Taken together, these outcomes suggest that the action remains effective, while also signaling an opportunity to strengthen coaching, follow-up support, and implementation structures so staff feel increasingly confident applying new learning in practice.

Improved Professional Development for Live Instruction – Highly Effective

Improved professional development for live Instruction has been highly effective. The number of professional development opportunities focused on live instruction rose to 20 in Year 2, reflecting Sage Oak's strong investment in instructional excellence and significantly expanding support for teachers. These sessions were grounded in evidence-based practices and focused on strengthening live synchronous instruction through high-impact strategies, educational technology, and AI integration. Key themes included clarifying learning goals, strengthening classroom discussion, and using instructional tools such as Nearpod, Classkick, Canva, MagicSchool AI, Kami, Gimkit, and Zoom to improve engagement, formative assessment, differentiation, and efficiency. Staff feedback consistently showed that teachers valued hands-on learning, collaboration with colleagues, and practical strategies they could apply immediately in their classes.

Professional Development Passport and Refinement Through Staff Feedback – Highly Effective

Sage Oak's broader professional learning system was also highly effective. The Professional Development Passport provided staff with a personalized and aligned menu of learning opportunities, allowing teachers and staff to deepen skills in areas most relevant to their roles and professional goals. Feedback indicated that staff appreciated the opportunity to grow professionally and further hone their practice. The professional development plan also demonstrates that Sage Oak refined sessions in response to staff feedback throughout the year, making the training increasingly targeted and relevant. Teachers consistently emphasized the value of breakout sessions, program-specific support, and opportunities to explore tools from both teacher and student perspectives. Feedback across sessions showed high levels of relevance and usefulness, and 97% of staff reported feeling well-equipped based on the professional development they received during the year. These results indicate that Sage Oak's investment in professional learning is strengthening staff capacity and supporting more effective instruction across programs.

Development of Social and Emotional Support Systems – Highly Effective

Development of Social and Emotional Support Systems has been highly effective. In Year 2, 92% of parents, 91% of students, and 95% of staff reported being informed about available social-emotional resources, indicating strong awareness across stakeholder groups. In addition, synchronous counseling groups and classes expanded significantly, reaching 238 sessions this year with consistently strong student engagement. Popular offerings included executive functioning support through Life Hacks at the high school level and Brain Boss for students in grades 3–8. AVID was also successfully introduced for middle school students, further strengthening support in organization, study skills, and college readiness. These results demonstrate that Sage Oak has made substantial progress in expanding both access to and awareness of social-emotional and student support services.

Conclusion

Overall, the specific actions under Goal 2 have been effective to highly effective in making progress toward the goal. The strongest areas of impact include opportunities for involvement, school climate, attendance, professional development, and social-emotional supports, all of which show strong Year 2 outcomes. Student retention met the three-year target in Year 2, while leadership pathway confidence continues to show forward progress. The addition of staff-centered successes, including Top Workplace recognition and the strong response to the Professional Development Passport, further reinforces that Sage Oak is building a culture where staff feel supported, valued, and equipped to grow. Taken together, these results show that Goal 2 actions are producing meaningful positive outcomes and are building a strong foundation for continued growth in the final year of the cycle.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Based on reflection on prior practice, no major changes were made to the overall structure of Goal 2. The goal, metrics, and actions remain relevant and aligned with the school's identified needs. However, implementation experience and Year 2 data indicate the importance of continuing to strengthen strategies related to student retention, student connection to the school's mission, and sustained engagement over

time. Future efforts will continue to build on the strong progress already made in school climate, community engagement, staff development, and awareness of social-emotional supports.
For the coming year, Sage Oak will continue refining Goal 2 by expanding connection opportunities, strengthening onboarding and re-engagement systems, maintaining leadership pathway supports, and continuing professional development that improves live instruction and staff confidence. The school will also continue prioritizing access to counselor-led supports and ensuring that students and families are aware of available resources early and consistently throughout the year. These refinements are intended to strengthen areas while preserving the strong foundation already established under this goal.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
2.1	Enhancing Community Connection Opportunities	Increase opportunities for parents, students, and staff to connect with each other and with school leadership, fostering a sense of community and alignment with the school's mission and vision. This action is dedicated to increasing opportunities for meaningful engagement among parents, students, and school leadership. By fostering a deeper sense of community and ensuring alignment with the school's mission and vision, we aim to create an inclusive environment that supports professional growth and student success. Initiatives will include structured forums for feedback, engagement events, and clear communication channels that encourage active participation from all members of our school community. Metrics for Effectiveness: 2.1 Community Engagement Perception: Measurement of the community's perception regarding the school's efforts to provide opportunities for involvement and input. This will be assessed through surveys asking if participants believe Sage Oak makes a significant effort to foster community engagement. 2.2 Retention of Credentialed Teachers: Maintaining a 100% rate of credentialed teachers, ensuring that students have access to qualified and dedicated professionals. 2.3 Attendance Rate Stability: Maintenance of school attendance rates at optimal levels, reflecting student engagement and a supportive learning environment.	$4,064,256.00	Yes

Action #	Title	Description	Total Funds	Contributing
		2.4 Low Chronic Absenteeism: Sustaining low rates of chronic absenteeism, indicating an engaging and welcoming school climate that motivates regular attendance. 2.5 Low Suspension and Expulsion Rates: Keeping suspension and expulsion rates minimal, demonstrating effective behavior management and a positive school culture. 2.6 Connection to School's Mission: Proportion of the school community that feels connected to the school's mission of empowering students, as measured by targeted surveys. This metric gauges the alignment of community values with the school's objectives. 2.7 Student Retention Rate Improvement: An increase in the student retention rate, indicating success in creating a supportive and engaging environment that encourages students to continue their education at Sage Oak. 2.8 School Climate: Proportion of the school community that feels safe, respected and values, as measured by targeted surveys. This metric gauges the alignment of community values with the school's objectives. Through these targeted actions and metrics, we aim to not only enhance the sense of community and engagement within our school but also to ensure that our educational environment is conducive to professional growth, student success, and sustained participation from our entire school community.		
2.2	Development of Professional Growth Pathways	Develop purposeful pathways for growth and opportunities for professional development. This action focuses on creating purposeful pathways for professional growth, offering expansive opportunities for all staff members to develop. By initiating comprehensive leadership and professional development programs, we aim to equip our staff with the skills and confidence necessary to innovate and enhance their respective practices across the board. This initiative is designed to cultivate a culture that values continuous learning, adaptability, and professional excellence, contributing significantly to the overall effectiveness and sustainability of our educational environment.	$1,741,177.00	Yes

Action #	Title	Description	Total Funds	Contributing
		Metrics for Effectiveness: 2.9 Confidence and Integration of New Strategies: The proportion of staff involved in the Leadership Pathway reporting increased confidence in their ability to embrace and apply new strategies within their roles. This will be assessed through surveys that inquire about their readiness to incorporate these strategies into future practices, reflecting the professional development programs' impact on enhancing staff capabilities. 2.10 Retention Rates of Participating Staff: The retention rates of staff members who have participated in the professional development pathways will be closely monitored. A positive trend in these rates would indicate the success of the development opportunities in promoting job satisfaction, personal growth, and a strong commitment to the institution. This action underscores our dedication to fostering professional growth and development across all staff levels, enhancing our school's capacity to provide a high-quality, supportive, and engaging learning environment for all community members.		
2.3	Enhancement of Professional Development for Live Instruction	Increase professional development for live instruction. This action targets the expansion of professional development opportunities tailored to live instruction, aiming to empower our staff with the skills and techniques necessary for dynamic and effective real-time teaching. By providing a diverse array of training sessions, workshops, and seminars focused on live instructional strategies, we are committed to ensuring that all staff members feel confident and well-prepared to engage students in a live setting. This initiative is designed to elevate the quality of live instruction, ensuring that our educational delivery is both impactful and engaging. Metrics for Effectiveness: 2.11 Expansion of Professional Development Opportunities: Tracking the increase in professional development opportunities offered to staff, focusing on live instruction. This metric will encompass school-created	$309,637.00	Yes

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Action #	Title	Description	Total Funds	Contributing
		programs and external training opportunities included in our professional development portfolio. 2.12 Staff Confidence in Job Performance: The percentage of staff who believe they are well-equipped by Sage Oak to perform their roles effectively, particularly in the context of live instruction, based on the professional development received. This will be measured through surveys assessing staff perceptions of their preparedness and the adequacy of professional development support provided by the school. Through this targeted approach to professional development, we aim to not only enhance the effectiveness of live instruction but also to foster a culture of continuous learning and adaptability among our staff. This action reaffirms our commitment to supporting professional excellence and student success in every live instructional encounter.		
2.4	Development of Social and Emotional Support Systems	Develop a system to increase access and consistency for social and emotional resources and interventions. This action is dedicated to developing a comprehensive system designed to increase access to and consistency of social and emotional resources and interventions for our school community. Recognizing the critical importance of social and emotional well-being in educational success, we aim to ensure that students, parents, and teachers are well-informed and have easy access to the support services they need. Through this initiative, we will enhance our existing resources, introduce new interventions, and expand synchronous support opportunities, such as groups or classes led by counselors, to address the diverse needs of our community effectively. Additionally, this action has been revised to reflect the strategic use of Learning Recovery Emergency Block Grant (LREBG) funds to expand staffing and improve teacher-to-student ratios within our counseling offerings. Metrics for Effectiveness:	$505,623.00	Yes

Action #	Title	Description	Total Funds	Contributing
		2.13 Awareness of Socio-Emotional Resources: The percentage of parents, students, and teachers that report feeling informed about the social and emotional resources provided by Sage Oak. This measure will assess the effectiveness of our communication strategies and the accessibility of our resources. 2.14 Expansion of Synchronous Support Opportunities: The increase in the number of synchronous support groups or classes with counselors, reflecting our commitment to providing real-time, interactive support sessions that cater to the emotional and social needs of our students. By implementing this action, we aim to create a nurturing and supportive environment that prioritizes the social and emotional well-being of our students. This comprehensive support system will not only address immediate needs but also contribute to the long-term resilience and success of our school community.		

Goals and Actions

Goal

Goal #	Description	Type of Goal
3	Conditions of Learning: Efficient Operations with a Focus on Sustainability Leverage technologies, specifically Artificial Intelligence, 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.	Broad Goal

State Priorities addressed by this goal.

Priority 1: Basic (Conditions of Learning)
Priority 2: State Standards (Conditions of Learning)
Priority 4: Pupil Achievement (Pupil Outcomes)
Priority 7: Course Access (Conditions of Learning)
Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

Understanding the importance of future-proofing its educational approach, Sage Oak integrates robust systems that prioritize sustainability and efficiency into its strategic plan. This initiative focuses on streamlining operations, optimizing resources, and adopting sustainable practices, aligning with the school's mission and values. By leveraging Artificial Intelligence and other advanced technologies, Sage Oak aims to provide personalized learning pathways, ensuring education is more accessible, engaging, and effective for students. This forward-thinking approach prepares the Sage Oak community for a rapidly evolving educational landscape, embodying the school's commitment to innovation and excellence.
Sage Oak's current staff-to-student ratio of 13:1 highlights our dedicated investment in staffing to ensure personalized learning. With efforts to enhance operational efficiency, we anticipate a more optimized staff-to-student ratio. This adjustment will enable us to extend our educational reach without compromising the quality of instruction. By streamlining administrative tasks, teachers can dedicate more attention to enriching student interactions, further improving the educational experience. This strategic approach ensures that resources are maximized for the direct benefit of our students, aligning with our mission to provide high-quality, focused education.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
3.1	Staff to Student Ratio Improvement staff to student ratio	13:1 Source: Internal 22-23	13:1	13:1	19:1	0
3.2	Improved Work Efficiency and Satisfaction % of leadership staff reporting noticeable improvements in work efficiency and satisfaction	93% Source: Internal 23-24	92%	96%	90% or higher	2%
3.3	Increased Staff Confidence in Using AI Tools % of staff reporting confidence in their ability to use AI tools to improve learning outcomes	79% Source: Internal 23-24	91%	95%	90%	16%

Goal Analysis [2025-26]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Efficiency and Innovation: Building Sustainable Systems Through Technology and AI

During the 2025–26 school year, Goal 3 focused on strengthening operational efficiency and long-term sustainability through the thoughtful integration of technology and Artificial Intelligence (AI). Grounded in Sage Oak's strategic plan, implementation emphasized streamlining operational systems, improving staff efficiency, and increasing staff capacity to use AI tools in ways that support teaching, learning, and

responsive service delivery. The goal remained centered on technology optimization for enhanced operations and AI-driven personalized learning implementation, and implementation remained closely aligned with the original LCAP plan.

Throughout the year, Sage Oak continued evaluating and refining internal systems to improve efficiency and reduce time spent on routine operational processes. Technology was used to streamline practices such as scheduling, attendance-related systems, form processing, survey analysis, and instructional preparation, helping reduce manual workload and improve consistency across departments. At the same time, staff continued building familiarity and confidence in using AI and educational technology to support lesson planning, progress monitoring, assessment feedback, and other personalized instructional applications. These efforts reflected Sage Oak's continued investment in practical, meaningful, and instructionally relevant AI integration.

A major part of this year's work was Sage Oak's collaboration with an external consultant to support the development of the school's AI policy. As part of this process, the consultant engaged with individuals across the organization who are involved with AI, conducted an AI SWOT analysis, and provided a report outlining strengths, weaknesses, opportunities, and threats related to Sage Oak's current and future use of AI. This approach helped the school better understand its current landscape, identify areas for growth and caution, and take a more strategic and informed approach to long-term AI implementation.

Implementation of Goal 3 led Sage Oak to refine how we define efficiency. Rather than increasing the overall student to staff ratio from 13:1 to 19:1, Sage Oak maintained the 13:1 ratio and shifted staffing and resources toward direct student support. Over the past year, the school increased instructional staffing and reduced the proportion of non instructional roles through improved systems, technology, and AI supported efficiencies. This shift strengthened teaching, intervention, counseling, planning, and other student facing services preserving the human connection central to Sage Oak's approach. As a result, progress under Goal 3 is reflected not in a higher overall ratio, but in a greater percentage of staff directly serving students and supporting student outcomes.

While implementation was strong overall, the school also identified areas for continued refinement. Although staff readiness and workflow efficiency showed positive growth, the direct impact of AI-supported personalization on student academic outcomes is still developing and will require continued monitoring over time. Sage Oak also continued refining cross-departmental alignment so that technology systems remain scalable, sustainable, and responsive to the school's evolving needs.

Overall, Goal 3 was implemented successfully and remained closely aligned with the planned actions. The strongest areas of implementation included workflow efficiency, staff readiness to use AI tools, the strategic development of an AI policy framework, and the continued creation of scalable systems that support both operations and instruction. At the same time, the school continues to refine how long-term outcomes are measured, particularly in relation to organizational capacity and the instructional impact of AI-supported personalization. Taken together, these results show that Goal 3 actions are producing meaningful progress and establishing a strong foundation for continued growth in the final year of the cycle.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The school spent materially more on actions 3.1 related to increased expenditures for enhancing the schools technology operations and development for artificial intelligence personalized learning.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Overall Assessment: Effective to Highly Effective

The actions under Goal 3 have been effective to highly effective in making progress toward the goal of increasing operational efficiency, building staff capacity, and establishing more sustainable systems through the use of technology and AI. The strongest evidence of progress is seen in staff-reported efficiency, satisfaction, and confidence in using AI tools. At the same time, some long-term outcomes, particularly the staff-to-student ratio and the direct impact of AI-supported personalization on student learning, are still developing and will require continued refinement and monitoring.

Technology Optimization for Enhanced Operations – Highly Effective

This action has been highly effective in improving workflow efficiency and staff capacity. Leadership staff reporting noticeable improvements in work efficiency and satisfaction increased to 96% in Year 2, exceeding the target of 90% or higher. These results suggest that efforts to streamline operational systems, automate repeatable processes, and improve technology-supported workflows are having a positive effect on day-to-day practice. Rather than viewing the total staff-to-student ratio solely as a metric to increase, Sage Oak's implementation of Goal 3 clarified that the more meaningful priority is ensuring that staffing structures directly support student outcomes. During this cycle, the school intentionally increased instructional spending and prioritized shifting staffing and resources toward direct instructional and student-facing supports. As a result, Sage Oak has identified the 13:1 staff-to-student ratio as an important metric to maintain in order to best evaluate effectiveness in student outcomes while continuing to build efficiency through improved systems and technology. This suggests that progress under this action is better reflected in increased staff capacity, stronger instructional investment, and improved service delivery than in movement toward a higher ratio alone.

AI-Driven Personalized Learning Implementation – Highly Effective

This action has also been highly effective in increasing staff readiness to use AI as a tool to support teaching and learning. Staff confidence in using AI tools increased from a baseline of 79% to 95% in Year 2, surpassing the target of 90%. These gains indicate meaningful growth in staff comfort and skill in using AI for lesson planning, assessment feedback, progress monitoring, and other instructional supports. In addition, Sage Oak's collaboration with an external consultant to support development of the school's AI policy strengthened this work by helping the organization take a more strategic and informed approach to implementation. Through stakeholder engagement, an AI SWOT analysis, and a report identifying strengths, weaknesses, opportunities, and threats, the school was able to better understand its current landscape and build a stronger foundation for responsible and sustainable AI integration.

Long-Term Impact and Continued Refinement – Effective with Forward Progress

While Goal 3 actions are clearly producing positive results, some longer-term outcomes are still evolving. The most important learning from implementation is that efficiency at Sage Oak is better understood through increased organizational capacity and stronger alignment of staffing to student needs than through a change in the total staff-to-student ratio by itself. The school's ability to maintain a 13:1 ratio while shifting resources toward instruction and direct student support reflects meaningful progress in this area. At the same time, the measurable effect of AI-supported personalization on student academic outcomes remains more difficult to isolate than staff-capacity and workflow measures. These areas are best described as effective with forward progress, as the systems, staff readiness, and implementation conditions are strengthening, even if some broader impacts will take longer to measure. Sage Oak remains committed to a student-centered approach in which technology and AI are used to amplify staff effectiveness rather than replace relationships or direct support.

Conclusion

Overall, the actions under Goal 3 have been effective to highly effective in making progress toward the goal. The clearest areas of impact include improved operational efficiency, stronger staff confidence in using AI tools, the strategic development of an AI policy framework, and a more intentional alignment of staffing and instructional investment to support student outcomes. The main area requiring continued refinement is how the school measures long-term impact, particularly the academic effect of AI-supported personalization. Taken together, these results show that Goal 3 actions are strengthening Sage Oak's operational foundation while preserving its commitment to a high-touch, student-centered model of service.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Based on reflection on prior practice, no changes will be made to the planned goal, metrics, target outcomes, or actions for Goal 3. The goal remains relevant and aligned with Sage Oak's ongoing priorities related to operational efficiency, sustainability, and the thoughtful integration of technology and Artificial Intelligence (AI). Implementation to date suggests that the current goal structure continues to support the school's efforts to strengthen systems, increase staff capacity, and improve service delivery while maintaining a high-touch, student-centered model.

For the coming year, Sage Oak will continue refining implementation of Goal 3 by focusing on systems that increase staff capacity and service efficiency while preserving student-centered supports. The school will prioritize automation of routine tasks, clearer workflow alignment across departments, and expanded practical AI use cases so that technology amplifies staff effectiveness rather than replacing human interaction. These refinements are intended to build on the progress already made in workflow efficiency and staff confidence with AI tools while continuing to strengthen long-term sustainability and organizational capacity.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
3.1	Technology Optimization for Enhanced Operations	Evaluate, integrate, and optimize technology to streamline and automate operational processes and procedures. This action focuses on the strategic evaluation, integration, and optimization of technology systems to streamline operational processes, reduce inefficiencies, and strengthen long-term organizational sustainability. With a particular emphasis on Artificial Intelligence (AI), Sage Oak will continue identifying opportunities to automate routine and repetitive tasks, improve internal workflows, and enhance the efficiency of day-to-day operations across departments. This includes the continued use of technology to support scheduling, data analysis, communication systems, survey processing, form management, and other operational procedures that can be improved through automation and streamlined design. Through this work, Sage Oak seeks not to reduce staffing, but to increase the school's ability to do more with the staff it has while preserving a high-touch, student-centered model. As the school has expanded key people-centered supports, including IT, counseling for SEL and planning, and intervention services, technology serves as a tool to strengthen staff capacity and allow personnel to devote more time to direct student and family support. By refining systems and reducing manual workload, this action supports more efficient use of resources while maintaining the relationships and personalized support that are central to Sage Oak's educational model. Metrics for Effectiveness: 3.1 Staff-to-Student Ratio Improvement: Monitoring changes in the staff-to-student ratio as one indicator of increased organizational capacity and more efficient distribution of resources over time. While the school remains committed to maintaining strong student supports, this metric reflects the long-term goal of improving operational scalability through more efficient systems and workflows.. 3.2 Work Efficiency and Satisfaction: The percentage of staff reporting noticeable improvements in work efficiency and satisfaction following the implementation of new technology solutions. This metric will continue to be assessed through internal surveys designed to capture staff perceptions of	$4,047,592.00	No

Action #	Title	Description	Total Funds	Contributing
		how technology improvements support their daily work and overall effectiveness. Through this initiative, Sage Oak aims to build a more streamlined, efficient, and sustainable operational framework that supports staff effectiveness, protects people-centered services, and enhances the conditions of learning for students and staff.		
3.2	AI-Driven Personalized Learning Implementation	Implement AI-driven personalized learning strategies to maximize student learning. This action focuses on the thoughtful implementation of Artificial Intelligence (AI)-supported strategies to strengthen teaching, learning, and personalized academic support for students. Sage Oak will continue building staff capacity to use AI tools in ways that enhance instructional planning, support differentiated learning, improve progress monitoring, and increase responsiveness to student needs. AI will be used to help staff develop more adaptive and efficient approaches to instruction while maintaining the school's commitment to personalized, relationship-based learning. This work is grounded in Sage Oak's belief that AI should amplify, not replace, the work of educators and support staff. Professional learning and guided implementation will continue to help staff use AI responsibly and effectively in areas such as lesson design, feedback, resource development, and instructional support. As staff confidence and competence continue to grow, AI-supported practices will help create more flexible and engaging learning experiences for students while increasing staff efficiency and instructional capacity. Metrics for Effectiveness: 3.3 Staff Confidence in Using AI Tools: The percentage of staff reporting confidence in their ability to use AI tools to improve learning outcomes, based on training and implementation support received. This metric will assess the effectiveness of professional development efforts in preparing	$215,928.00	Yes

Action #	Title	Description	Total Funds	Contributing
		staff to use AI as a practical and responsible tool for personalized learning and instructional improvement. Through the continued implementation of AI-supported personalized learning strategies, Sage Oak aims to create a more engaging, inclusive, and effective educational environment that responds to diverse student needs while supporting academic growth and operational efficiency.		

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2026-27]

Total Projected LCFF Supplemental and/or Concentration Grants	Projected Additional 15 percent LCFF Concentration Grant
$$5,727,140	$0

Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
10.438%	0.000%	$0.00	10.438%

The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.

Required Descriptions

LEA-wide and Schoolwide Actions

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
1.1	**Action:** Integration of Career, Community, and Life Skills **Need:** All students, including unduplicated students, require enhanced access to career, community, and life skills education due to historical inequities and limited access to external resources.	This action provides enhanced access to career, community, and life skills education through dedicated synchronous courses and counseling supports (Action 1.1). While offered LEA-wide, the curriculum and support are intentionally designed with differentiated content and targeted outreach to ensure unduplicated students, who historically have less access to these resources, receive services that are increased in intensity and improved in quality and relevance compared to a universal offering without these targeted elements.	Completion of A-G Requirements, Career Technical Education (CTE) Pathway Completion, Percentage of Students Achieving a Score of 3 or Higher on AP Exams.

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
	Scope: LEA-wide	This is the most effective approach to ensure equitable access and outcomes across the geographically diverse LEA.	
1.2	**Action:** Refinement of Multi-Tiered System of Support **Need:** Unduplicated students demonstrate persistent academic achievement gaps and socio-emotional needs requiring intensified and differentiated support. **Scope:** LEA-wide	This action refines the LEA-wide MTSS to provide increased levels of targeted, small-group instruction and improved socio-emotional supports (Action 1.2), particularly for unduplicated students identified through data analysis. The LEA-wide scope ensures consistent access to these tiered interventions across all locations, but the design and resource allocation (including LREBG-funded staffing) are principally directed towards and intensified for unduplicated pupils to accelerate their academic growth and address well-being challenges more effectively than a universal support system.	Performance in iReady Assessments for ELA and Math, and CAASPP Achievement for English learners, foster youth, and low-income students.
2.1	**Action:** Enhancing Community Connection Opportunities **Need:** Foster youth, English learners, and low-income students often face barriers to full participation in school activities, which can affect their sense of belonging and engagement with the school community. **Scope:** LEA-wide	Increasing community connection opportunities addresses this need by creating inclusive, accessible engagement activities that encourage participation from all students and their families, regardless of background. This action aims to build a stronger, more cohesive school community where unduplicated students feel valued and supported.	Maintenance of Positive Community Engagement Perception, Maintenance of High Attendance Rate, Maintenance of Low Chronic Absenteeism.
2.2	**Action:** Development of Professional Growth Pathways	Providing professional growth pathways for all educators ensures a high-quality educational experience for every student, including	Increased Confidence and Integration of New Strategies by staff, and

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
	Need: Educators require ongoing professional development to effectively meet the diverse needs of all students, fostering an engaging and supportive learning environment. **Scope:** LEA-wide	unduplicated students. This school wide action supports the continuous improvement of teaching strategies that directly benefit these groups by enhancing educators' skills and knowledge.	retention rates of participating staff, which indirectly reflect the improved educational environment for unduplicated students.
2.3	**Action:** Enhancement of Professional Development for Live Instruction **Need:** Effective live instruction requires specific pedagogical skills, particularly to engage unduplicated students who may have varied learning needs and preferences. **Scope:** LEA-wide	Enhancing professional development for live instruction across the LEA ensures that all educators are equipped to deliver engaging, high-quality live instruction that caters to the diverse needs of all students, including unduplicated groups. This approach is crucial for maintaining student engagement and improving learning outcomes.	Expansion of Professional Development Opportunities focusing on live instruction, and improvement in staff confidence in job performance, particularly in engaging and instructing unduplicated students effectively.
2.4	**Action:** Development of Social and Emotional Support Systems **Need:** Unduplicated students, particularly foster youth, English learners, low-income, and homeless students, face significant socio-emotional barriers impacting their educational success.	This action develops an LEA-wide system to increase access to and improve the consistency and targeting of social and emotional resources and interventions (Action 2.4). While available to all, the system is designed with specific components, such as dedicated counselor support and tailored interventions (including LREBG-funded staffing), that are principally directed towards and intensified for unduplicated students to address their unique and heightened socio-emotional needs more effectively than a universal approach. The LEA-wide scope ensures equitable	Awareness of Socio-Emotional Resources, Expansion of Synchronous Support Opportunities

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Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
	Scope: LEA-wide	access to these intensified supports across all locations.	
3.2	**Action:** AI-Driven Personalized Learning Implementation **Need:** English learners and low-income students, in particular, benefit from personalized learning strategies that tailor instruction to their unique needs and learning styles, addressing gaps in knowledge and accelerating progress. **Scope:** LEA-wide	Implementing AI-driven personalized learning strategies on a schoolwide basis ensures that all students, especially unduplicated students, receive customized educational experiences designed to maximize their learning potential. This approach is critical for closing achievement gaps and supporting the academic growth of each student.	Increased Staff Confidence in Using AI Tools, Staff to Student Ratio Improvement, Improved Work Efficiency and Satisfaction.

Limited Actions

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

Goal and Action #	Identified Need(s)	How the Action(s) are Designed to Address Need(s)	Metric(s) to Monitor Effectiveness
1.5	**Action:** Enhancing English Learner Proficiency and Reclassification **Need:**	This action is specifically tailored to address the needs of English learners and LTELs by maintaining participation in synchronous instruction focused on language development. It aims to provide personalized and engaging	Improvement in ELPAC scores, an increase in the reclassification rate of English learners and LTELs, increased

Goal and Action #	Identified Need(s)	How the Action(s) are Designed to Address Need(s)	Metric(s) to Monitor Effectiveness
	English learners and Long-Term English learners (LTELs) face specific challenges in achieving language proficiency, which is crucial for academic success and full participation in school activities. There is a need for targeted interventions to accelerate English language development and facilitate timely reclassification. Additionally, there is a need for an increased number of professional development opportunities supporting English language development and LTEL instruction. **Scope:** Limited to Unduplicated Student Group(s)	learning experiences that support language acquisition, academic achievement, and reclassification. By supporting these synchronous instruction opportunities, English learners receive the focused support necessary to improve their English proficiency, thereby enhancing their overall educational experience and outcomes. Increased professional development opportunities will strategically impact synchronous instruction and provide targeted tools to support English learners and LTELs.	participation rates in targeted synchronous instruction, and an increase in applicable professional development.

For any limited action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage, as applicable.

Additional Concentration Grant Funding

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

n/a

Staff-to-student ratios by type of school and concentration of unduplicated students	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students	n/a	n/a
Staff-to-student ratio of certificated staff providing direct services to students	n/a	n/a

2026-27 Total Planned Expenditures Table

LCAP Year	1. Projected LCFF Base Grant (Input Dollar Amount)	2. Projected LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Input Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)
Totals	$ 54,868,172	$5,727,140	10.438%	0.000%	10.438%

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	$56,121,874.00	$12,506,282.00	$0.00	$822,759.00	$69,450,915.00	$52,194,638.00	$17,256,277.00

Goal #	Action #	Action Title	Student Group(s)	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Planned Percentage of Improved Services
1	1.1	Integration of Career, Community, and Life Skills	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2026-27	$41,769,096.00	$11,177,809.00	$43,549,400.00	$9,271,148.00	$0.00	$126,357.00	$52,946,905.00	
1	1.2	Refinement of Multi-Tiered System of Support	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2026-27	$4,375,991.00	$653,295.00	$2,198,165.00	$2,134,719.00	$0.00	$696,402.00	$5,029,286.00	
1	1.3	Enhancement of Math Proficiency for Students with Disabilities	Students with Disabilities	No			All Schools	Fiscal 2026-27	$0.00	$590,511.00	$23,281.00	$567,230.00	$0.00	$0.00	$590,511.00	
1	1.4	Unified Articulation Process Development	All	No			All Schools	Fiscal 2026-27	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	
1	1.5	Enhancing English Learner Proficiency and Reclassification	English Learners	Yes	Limited to Unduplicated Student Group(s)	English Learners	All Schools	Fiscal 2026-27	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	
2	2.1	Enhancing Community Connection Opportunities	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2026-27	$3,772,342.00	$291,914.00	$4,048,860.00	$15,396.00	$0.00	$0.00	$4,064,256.00	
2	2.2	Development of Professional Growth Pathways	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2026-27	$0.00	$1,741,177.00	$1,729,011.00	$12,166.00	$0.00	$0.00	$1,741,177.00	
2	2.3	Enhancement of Professional Development for Live Instruction	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2026-27	$0.00	$309,637.00	$309,637.00	$0.00	$0.00	$0.00	$309,637.00	
2	2.4	Development of Social and Emotional Support Systems	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2026-27	$505,623.00	$0.00	$0.00	$505,623.00	$0.00	$0.00	$505,623.00	

Goal #	Action #	Action Title	Student Group(s)	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Planned Percentage of Improved Services
3	3.1	Technology Optimization for Enhanced Operations	All	No			All Schools	Fiscal 2026-27	$1,771,586.00	$2,276,006.00	$4,047,592.00	$0.00	$0.00	$0.00	$4,047,592.00	
3	3.2	AI-Driven Personalized Learning Implementation	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income		Fiscal 2026-27	$0.00	$215,928.00	$215,928.00	$0.00	$0.00	$0.00	$215,928.00	

2026-27 Contributing Actions Table

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)	Totals by Type	Total LCFF Funds
$ 54,868,172	$5,727,140	10.438%	0.000%	10.438%	$52,051,001.00	0.000%	94.866 %	**Total:**	$52,051,001.00
								LEA-wide Total:	$52,051,001.00
								Limited Total:	$0.00
								Schoolwide Total:	$0.00

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
1	1.1	Integration of Career, Community, and Life Skills	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$43,549,400.00	
1	1.2	Refinement of Multi-Tiered System of Support	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$2,198,165.00	
1	1.5	Enhancing English Learner Proficiency and Reclassification	Yes	Limited to Unduplicated Student Group(s)	English Learners	All Schools	$0.00	
2	2.1	Enhancing Community Connection Opportunities	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$4,048,860.00	
2	2.2	Development of Professional Growth Pathways	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$1,729,011.00	
2	2.3	Enhancement of Professional Development for Live Instruction	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$309,637.00	

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
2	**2.4**	Development of Social and Emotional Support Systems	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$0.00	
3	**3.2**	AI-Driven Personalized Learning Implementation	Yes	LEA-wide	English Learners Foster Youth Low Income		$215,928.00	

2025-26 Annual Update Table

Totals	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Expenditures (Total Funds)
Totals	$58,521,392.00	$59,193,581.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	**1.1**	Integration of Career, Community, and Life Skills	Yes	$45,059,783.00	44364469
1	**1.2**	Refinement of Multi-Tiered System of Support	Yes	$4,050,855.00	3627226
1	**1.3**	Enhancement of Math Proficiency for Students with Disabilities	No	$655,400.00	856937
1	**1.4**	Unified Articulation Process Development	No	$0.00	
1	**1.5**	Enhancing English Learner Proficiency and Reclassification	Yes	$0.00	
2	**2.1**	Enhancing Community Connection Opportunities	Yes	$3,779,428.00	3617760
2	**2.2**	Development of Professional Growth Pathways	Yes	$1,345,936.00	1067424
2	**2.3**	Enhancement of Professional Development for Live Instruction	Yes	$224,324.00	229941
2	**2.4**			$353,460.00	445652
2	**2.5**	Development of Social and Emotional Support Systems	Yes		
3	**3.1**	Technology Optimization for Enhanced Operations	No	$2,685,440.00	4649355

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
3	**3.2**	AI-Driven Personalized Learning Implementation	Yes	$366,766.00	334817

2025-26 Contributing Actions Annual Update Table

6. Estimated LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Expenditures for Contributing Actions (Subtract 7 from 4)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Percentage of Improved Services (%)	Difference Between Planned and Estimated Percentage of Improved Services (Subtract 5 from 8)
$4,513,704	$41,983,385.00	$42,322,735.00	($339,350.00)	0.000%	0.000%	0.000%

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributing to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services (Input Percentage)
1	1.1	Integration of Career, Community, and Life Skills	Yes	$35,530,454.00	$36,218,834		
1	1.2	Refinement of Multi-Tiered System of Support	Yes	$1,624,313.00	$1,455,291		
1	1.5	Enhancing English Learner Proficiency and Reclassification	Yes	$0.00			
2	2.1	Enhancing Community Connection Opportunities	Yes	$3,763,086.00	$3,585,602		
2	2.2	Development of Professional Growth Pathways	Yes	$600,275.00	$645,055		
2	2.3	Enhancement of Professional Development for Live Instruction	Yes	$224,324.00	$229,941		
2	2.5	Development of Social and Emotional Support Systems	Yes	$0.00			
3	3.2	AI-Driven Personalized Learning Implementation	Yes	$240,933.00	$188,012		

2025-26 LCFF Carryover Table

9. Estimated Actual LCFF Base Grant (Input Dollar Amount)	6. Estimated Actual LCFF Supplemental and/or Concentration Grants	LCFF Carryover — Percentage (Percentage from Prior Year)	10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	8. Total Estimated Actual Percentage of Improved Services (%)	11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9)	13. LCFF Carryover — Percentage (12 divided by 9)
$46,812,940	$4,513,704	0	9.642%	$42,322,735.00	0.000%	90.408%	$0.00	0.000%

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Local Control and Accountability Plan Instructions

Plan Summary

Engaging Educational Partners

Goals and Actions

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at LCFF@cde.ca.gov.

Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (California Education Code [EC] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.

- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (EC Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.

- **Accountability and Compliance:** The LCAP serves an important accountability function because the nature of some LCAP template sections require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:

    - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, including long-term English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (EC Section 52064[b][4-6]).

    - Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (EC sections 52064[b][1] and [2]).

        - **NOTE:** As specified in EC Section 62064(b)(1), the LCAP must provide a description of the annual goals, for all pupils and each subgroup of pupils identified pursuant to EC Section 52052, to be achieved for each of the state priorities. Beginning in 2023–24, EC

Section 52052 identifies long-term English learners as a separate and distinct pupil subgroup with a numerical significance at 15 students.

- Annually reviewing and updating the LCAP to reflect progress toward the goals (EC Section 52064[b][7]).
- Ensuring that all increases attributable to supplemental and concentration grant calculations, including concentration grant add-on funding and/or LCFF carryover, are reflected in the LCAP (EC sections 52064[b][6], [8], and [11]).

The LCAP template, like each LEA's final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which must: (a) reflect comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (Dashboard), (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in EC sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity's budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2024–25, 2025–26, and 2026–27 school years reflects statutory changes made through Senate Bill 114 (Committee on Budget and Fiscal Review), Chapter 48, Statutes of 2023 and Senate Bill 153, Chapter 38, Statues of 2024.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA's diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

> Given present performance across the state priorities and on indicators in the Dashboard, how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions which, based on research, experience, and input gathered from educational partners, the LEA believes will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP but may include information about effective practices when developing the LCAP and completing the LCAP document. Additionally, the beginning of each template section includes information emphasizing the purpose that section serves.

Plan Summary

Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to present a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included throughout each subsequent section of the LCAP.

Requirements and Instructions

General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA. LEAs may also provide information about their strategic plan, vision, etc.

Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA.

- For example, information about an LEA in terms of geography, enrollment, employment, the number and size of specific schools, recent community challenges, and other such information the LEA may wish to include can enable a reader to more fully understand the LEA's LCAP.
- LEAs may also provide information about their strategic plan, vision, etc.
- As part of this response, identify all schools within the LEA receiving Equity Multiplier funding.

Reflections: Annual Performance

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

Reflect on the LEA's annual performance on the Dashboard and local data. This may include both successes and challenges identified by the LEA during the development process.

LEAs are encouraged to highlight how they are addressing the identified needs of student groups, and/or schools within the LCAP as part of this response.

As part of this response, the LEA must identify the following, which will remain unchanged during the three-year LCAP cycle:

- Any school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard;
- Any student group within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard; and/or
- Any student group within a school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard.

EC Section 52064.4 requires that an LEA that has unexpended Learning Recovery Emergency Block Grant (LREBG) funds must include one or more actions funded with LREBG funds within the 2026-27, 2026-27 and 2027-28 LCAPs, as applicable to the LEA. To implement the requirements of *EC* Section 52064.4, all LEAs must do the following:

- For the 2025–26, 2026–27, and 2027–28 LCAP years, identify whether or not the LEA has unexpended LREBG funds for the applicable LCAP year.
    - If the LEA has unexpended LREBG funds the LEA must provide the following:
        - The goal and action number for each action that will be funded, either in whole or in part, with LREBG funds; and
        - An explanation of the rationale for selecting each action funded with LREBG funds. This explanation must include:
            - An explanation of how the action is aligned with the allowable uses of funds identified in *EC* Section 32526(c)(2); and
            - An explanation of how the action is expected to address the area(s) of need of students and schools identified in the needs assessment required by *EC* Section 32526(d).
                - For information related to the allowable uses of funds and the required needs assessment, please see the Program Information tab on the LREBG Program Information web page.
            - Actions may be grouped together for purposes of these explanations.
            - The LEA may provide these explanations as part of the action description rather than as part of the Reflections: Annual Performance.
    - If the LEA does not have unexpended LREBG funds, the LEA is not required to conduct the needs assessment required by *EC* Section 32627(d), to provide the information identified above or to include actions funded with LREBG funds within the 2026-27, 2026-27 and 2027-28 LCAPs.

Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

Annually identify the reason(s) the LEA is eligible for or has requested technical assistance consistent with EC sections 47607.3, 52071, 52071.5, 52072, or 52072.5, and provide a summary of the work underway as part of receiving technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance, however this also includes LEAs that have requested technical assistance from their COE.

- If the LEA is not eligible for or receiving technical assistance, the LEA may respond to this prompt as “Not Applicable.”

Comprehensive Support and Improvement

An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

- Identify the schools within the LEA that have been identified for CSI.

Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

- Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.

Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

- Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

Engaging Educational Partners

Purpose

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard, accountability, and improvement across the state priorities and locally identified priorities (EC Section 52064[e][1]). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public to understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

Requirements

Requirements

School districts and COEs: *EC* Section 52060(g) and *EC* Section 52066(g) specify the educational partners that must be consulted when developing the LCAP:

- Teachers,

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- Principals,
- Administrators,
- Other school personnel,
- Local bargaining units of the LEA,
- Parents, and
- Students

A school district or COE receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Before adopting the LCAP, school districts and COEs must share it with the applicable committees, as identified below under Requirements and Instructions. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

Charter schools: *EC* Section 47606.5(d) requires that the following educational partners be consulted with when developing the LCAP:

- Teachers,
- Principals,
- Administrators,
- Other school personnel,
- Parents, and
- Students

A charter school receiving Equity Multiplier funds must also consult with educational partners at the school generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for the school.

The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals. Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the CDE's LCAP webpage.

Before the governing board/body of an LEA considers the adoption of the LCAP, the LEA must meet the following legal requirements:

- For school districts, see *Education Code* Section 52062;
    - **Note:** Charter schools using the LCAP as the School Plan for Student Achievement must meet the requirements of *EC* Section 52062(a).
- For COEs, see *Education Code* Section 52068; and
- For charter schools, see *Education Code* Section 47606.5.

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- **NOTE:** As a reminder, the superintendent of a school district or COE must respond, in writing, to comments received by the applicable committees identified in the *Education Code* sections listed above. This includes the parent advisory committee and may include the English learner parent advisory committee and, as of July 1, 2024, the student advisory committee, as applicable.

Instructions

Respond to the prompts as follows:

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Complete the table as follows:

Educational Partners

Identify the applicable educational partner(s) or group(s) that were engaged in the development of the LCAP.

Process for Engagement

Describe the engagement process used by the LEA to involve the identified educational partner(s) in the development of the LCAP. At a minimum, the LEA must describe how it met its obligation to consult with all statutorily required educational partners, as applicable to the type of LEA.

- A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA's philosophical approach to engaging its educational partners.

- An LEA receiving Equity Multiplier funds must also include a summary of how it consulted with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

Describe any goals, metrics, actions, or budgeted expenditures in the LCAP that were influenced by or developed in response to the educational partner feedback.

- A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP.

- An LEA receiving Equity Multiplier funds must include a description of how the consultation with educational partners at schools generating Equity Multiplier funds influenced the development of the adopted LCAP.

- For the purposes of this prompt, this may also include, but is not necessarily limited to:
  - Inclusion of a goal or decision to pursue a Focus Goal (as described below)
  - Inclusion of metrics other than the statutorily required metrics
  - Determination of the target outcome on one or more metrics
  - Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
  - Inclusion of action(s) or a group of actions
  - Elimination of action(s) or group of actions
  - Changes to the level of proposed expenditures for one or more actions
  - Inclusion of action(s) as contributing to increased or improved services for unduplicated students
  - Analysis of effectiveness of the specific actions to achieve the goal
  - Analysis of material differences in expenditures
  - Analysis of changes made to a goal for the ensuing LCAP year based on the annual update process
  - Analysis of challenges or successes in the implementation of actions

Goals and Actions

Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal must be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs must consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard, in determining whether and how to prioritize its goals within the LCAP. As previously stated, strategic planning that

is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students, and to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- Focus Goal: A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.
    - All Equity Multiplier goals must be developed as focus goals. For additional information, see Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding below.
- Broad Goal: A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.
- Maintenance of Progress Goal: A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

Requirement to Address the LCFF State Priorities

At a minimum, the LCAP must address all LCFF priorities and associated metrics articulated in *EC* sections 52060(d) and 52066(d), as applicable to the LEA. The *LCFF State Priorities Summary* provides a summary of *EC* sections 52060(d) and 52066(d) to aid in the development of the LCAP.

Respond to the following prompts, as applicable:

Focus Goal(s)

Description

The description provided for a Focus Goal must be specific, measurable, and time bound.

- An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach.
- The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

Type of Goal

Identify the type of goal being implemented as a Focus Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain why the LEA has chosen to prioritize this goal.

- An explanation must be based on Dashboard data or other locally collected data.
- LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners.
- LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding

Description

LEAs receiving Equity Multiplier funding must include one or more focus goals for each school generating Equity Multiplier funding. In addition to addressing the focus goal requirements described above, LEAs must adhere to the following requirements.

Focus goals for Equity Multiplier schoolsites must address the following:

(A) All student groups that have the lowest performance level on one or more state indicators on the Dashboard, and

(B) Any underlying issues in the credentialing, subject matter preparation, and retention of the school's educators, if applicable.

- Focus Goals for each and every Equity Multiplier schoolsite must identify specific metrics for each identified student group, as applicable.
- An LEA may create a single goal for multiple Equity Multiplier schoolsites if those schoolsites have the same student group(s) performing at the lowest performance level on one or more state indicators on the Dashboard or, experience similar issues in the credentialing, subject matter preparation, and retention of the school's educators.
    - When creating a single goal for multiple Equity Multiplier schoolsites, the goal must identify the student groups and the performance levels on the Dashboard that the Focus Goal is addressing; or,
    - The common issues the schoolsites are experiencing in credentialing, subject matter preparation, and retention of the school's educators, if applicable.

Type of Goal

Identify the type of goal being implemented as an Equity Multiplier Focus Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain why the LEA has chosen to prioritize this goal.

- An explanation must be based on Dashboard data or other locally collected data.
- LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners.
- LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.
- In addition to this information, the LEA must also identify:
    - The school or schools to which the goal applies

LEAs are encouraged to approach an Equity Multiplier goal from a wholistic standpoint, considering how the goal might maximize student outcomes through the use of LCFF and other funding in addition to Equity Multiplier funds.

- Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the Expanded Learning Opportunities Program (ELO-P), the Literacy Coaches and Reading Specialists (LCRS) Grant Program, and/or the California Community Schools Partnership Program (CCSPP).
- This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.

Note: *EC* Section 42238.024(b)(1) requires that Equity Multiplier funds be used for the provision of evidence-based services and supports for students. Evidence-based services and supports are based on objective evidence that has informed the design of the service or support and/or guides the modification of those services and supports. Evidence-based supports and strategies are most commonly based on educational research and/or metrics of LEA, school, and/or student performance.

Broad Goal

Description

Describe what the LEA plans to achieve through the actions included in the goal.

- The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal.

- The goal description organizes the actions and expected outcomes in a cohesive and consistent manner.
- A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

Type of Goal

Identify the type of goal being implemented as a Broad Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

Maintenance of Progress Goal

Description

Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP.

- Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP.
- The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

Type of Goal

Identify the type of goal being implemented as a Maintenance of Progress Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain how the actions will sustain the progress exemplified by the related metrics.

Measuring and Reporting Results:

For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes.

- LEAs must identify metrics for specific student groups, as appropriate, including expected outcomes that address and reduce disparities in outcomes between student groups.

- The metrics may be quantitative or qualitative; but at minimum, an LEA's LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year, as applicable to the type of LEA.

- To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant local indicator self-reflection tools within the Dashboard.

- **Required metrics for LEA-wide actions:** For each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.

    - These required metrics may be identified within the action description or the first prompt in the increased or improved services section, however the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.

- **Required metrics for Equity Multiplier goals**: For each Equity Multiplier goal, the LEA must identify:

    - The specific metrics for each identified student group at each specific schoolsite, as applicable, to measure the progress toward the goal, and/or

    - The specific metrics used to measure progress in meeting the goal related to credentialing, subject matter preparation, or educator retention at each specific schoolsite.

- **Required metrics for actions supported by LREBG funds**: To implement the requirements of *EC* Section 52064.4, LEAs with unexpended LREBG funds must include at least one metric to monitor the impact of each action funded with LREBG funds included in the goal.

    - The metrics being used to monitor the impact of each action funded with LREBG funds are not required to be new metrics; they may be metrics that are already being used to measure progress towards goals and actions included in the LCAP.

Complete the table as follows:

Metric #

- Enter the metric number.

Metric

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- Identify the standard of measure being used to determine progress towards the goal and/or to measure the effectiveness of one or more actions associated with the goal.

Baseline

- Enter the baseline when completing the LCAP for 2024–25.
    - Use the most recent data associated with the metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2023 Dashboard for the baseline of a metric only if that data represents the most recent available data (e.g., high school graduation rate).
    - Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS.
    - Indicate the school year to which the baseline data applies.
    - The baseline data must remain unchanged throughout the three-year LCAP.
        - This requirement is not intended to prevent LEAs from revising the baseline data if it is necessary to do so. For example, if an LEA identifies that its data collection practices for a particular metric are leading to inaccurate data and revises its practice to obtain accurate data, it would also be appropriate for the LEA to revise the baseline data to align with the more accurate data process and report its results using the accurate data.
        - If an LEA chooses to revise its baseline data, then, at a minimum, it must clearly identify the change as part of its response to the description of changes prompt in the Goal Analysis for the goal. LEAs are also strongly encouraged to involve their educational partners in the decision of whether or not to revise a baseline and to communicate the proposed change to their educational partners.
    - Note for Charter Schools: Charter schools developing a one- or two-year LCAP may identify a new baseline each year, as applicable.

Year 1 Outcome

- When completing the LCAP for 2025–26, enter the most recent data available. Indicate the school year to which the data applies.
    - Note for Charter Schools: Charter schools developing a one-year LCAP may provide the Year 1 Outcome when completing the LCAP for both 2025–26 and 2026–27 or may provide the Year 1 Outcome for 2025–26 and provide the Year 2 Outcome for 2026–27.

Year 2 Outcome

- When completing the LCAP for 2026–27, enter the most recent data available. Indicate the school year to which the data applies.

- Note for Charter Schools: Charter schools developing a one-year LCAP may identify the Year 2 Outcome as not applicable when completing the LCAP for 2026–27 or may provide the Year 2 Outcome for 2026–27.

Target for Year 3 Outcome

- When completing the first year of the LCAP, enter the target outcome for the relevant metric the LEA expects to achieve by the end of the three-year LCAP cycle.
    - Note for Charter Schools: Charter schools developing a one- or two-year LCAP may identify a Target for Year 1 or Target for Year 2, as applicable.

Current Difference from Baseline

- When completing the LCAP for 2025–26 and 2026–27, enter the current difference between the baseline and the yearly outcome, as applicable.
    - Note for Charter Schools: Charter schools developing a one- or two-year LCAP will identify the current difference between the baseline and the yearly outcome for Year 1 and/or the current difference between the baseline and the yearly outcome for Year 2, as applicable.

Timeline for school districts and COEs for completing the "**Measuring and Reporting Results**" part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
Enter information in this box when completing the LCAP for **2024–25** or when adding a new metric.	Enter information in this box when completing the LCAP for **2024–25** or when adding a new metric.	Enter information in this box when completing the LCAP for **2025–26**. Leave blank until then.	Enter information in this box when completing the LCAP for **2026–27**. Leave blank until then.	Enter information in this box when completing the LCAP for **2024–25** or when adding a new metric.	Enter information in this box when completing the LCAP for **2025–26** and **2026–27**. Leave blank until then.

Goal Analysis:

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective towards achieving the goal. "Effective" means the degree to which the planned actions were successful in producing the target result. Respond to the prompts as instructed.

Note: When completing the 2024–25 LCAP, use the 2023–24 Local Control and Accountability Plan Annual Update template to complete the Goal Analysis and identify the Goal Analysis prompts in the 2024–25 LCAP as "Not Applicable."

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

- Describe the overall implementation of the actions to achieve the articulated goal, including relevant challenges and successes experienced with implementation.
    - Include a discussion of relevant challenges and successes experienced with the implementation process.
    - This discussion must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

- Describe the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal. “Effectiveness” means the degree to which the actions were successful in producing the target result and “ineffectiveness” means that the actions did not produce any significant or targeted result.
    - In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal.
    - When responding to this prompt, LEAs may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.
    - Beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.
    - As noted above, beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period. For actions that have been identified as ineffective, the LEA must identify the ineffective action and must include a description of the following:

- The reasons for the ineffectiveness, and
- How changes to the action will result in a new or strengthened approach.

Actions:

Complete the table as follows. Add additional rows as necessary.

Action #

- Enter the action number.

Title

- Provide a short title for the action. This title will also appear in the action tables.

Description

- Provide a brief description of the action.
    - For actions that contribute to meeting the increased or improved services requirement, the LEA may include an explanation of how each action is principally directed towards and effective in meeting the LEA's goals for unduplicated students, as described in the instructions for the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.
    - As previously noted, for each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.
    - These required metrics may be identified within the action description or the first prompt in the increased or improved services section; however, the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.

Total Funds

- Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the action tables.

Contributing

- Indicate whether the action contributes to meeting the increased or improved services requirement as described in the Increased or Improved Services section using a “Y” for Yes or an “N” for No.
    - **Note:** for each such contributing action, the LEA will need to provide additional information in the Increased or Improved Services section to address the requirements in *California Code of Regulations*, Title 5 [5 *CCR*] Section 15496 in the Increased or Improved Services section of the LCAP.

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Actions for Foster Youth: School districts, COEs, and charter schools that have a numerically significant foster youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to foster youth students.

Required Actions

For English Learners and Long-Term English Learners

- LEAs with 30 or more English learners and/or 15 or more long-term English learners must include specific actions in the LCAP related to, at a minimum:
    - Language acquisition programs, as defined in *EC* Section 306, provided to students, and
    - Professional development for teachers.
    - If an LEA has both 30 or more English learners and 15 or more long-term English learners, the LEA must include actions for both English learners and long-term English learners.

For Technical Assistance

- LEAs eligible for technical assistance pursuant to *EC* sections 47607.3, 52071, 52071.5, 52072, or 52072.5, must include specific actions within the LCAP related to its implementation of the work underway as part of technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance.

For Lowest Performing Dashboard Indicators

- LEAs that have Red Dashboard indicators for (1) a school within the LEA, (2) a student group within the LEA, and/or (3) a student group within any school within the LEA must include one or more specific actions within the LCAP:
    - The specific action(s) must be directed towards the identified student group(s) and/or school(s) and must address the identified state indicator(s) for which the student group or school received the lowest performance level on the 2023 Dashboard. Each student group and/or school that receives the lowest performance level on the 2023 Dashboard must be addressed by one or more actions.
    - These required actions will be effective for the three-year LCAP cycle.

For LEAs With Unexpended LREBG Funds

- To implement the requirements of *EC* Section 52064.4, LEAs with unexpended LREBG funds must include one or more actions supported with LREBG funds within the 2025–26, 2026–27, and 2027–28 LCAPs, as applicable to the LEA. Actions funded with LREBG funds must remain in the LCAP until the LEA has expended the remainder of its LREBG funds, after which time the actions may be removed from the LCAP.
    - Prior to identifying the actions included in the LCAP the LEA is required to conduct a needs assessment pursuant to *EC* Section 32526(d). For information related to the required needs assessment please see the Program Information tab on the LREBG

Program Information web page. Additional information about the needs assessment and evidence-based resources for the LREBG may be found on the California Statewide System of Support LREBG Resources web page. The required LREBG needs assessment may be part of the LEAs regular needs assessment for the LCAP if it meets the requirements of *EC* Section 32627(d).

- School districts receiving technical assistance and COEs providing technical assistance are encouraged to use the technical assistance process to support the school district in conducting the required needs assessment, the selection of actions funded by the LREBG and/or the evaluation of implementation of the actions required as part of the LCAP annual update process.
- As a reminder, LREBG funds must be used to implement one or more of the purposes articulated in *EC* Section 32526(c)(2).
- LEAs with unexpended LREBG funds must include one or more actions supported by LREBG funds within the LCAP. For each action supported by LREBG funding the action description must:
  - Identify the action as an LREBG action;
  - Include an explanation of how research supports the selected action;
  - Identify the metric(s) being used to monitor the impact of the action; and
  - Identify the amount of LREBG funds being used to support the action.

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students as defined in *EC* Section 42238.02 in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA's description in this section must align with the actions included in the Goals and Actions section as contributing.

Please Note: For the purpose of meeting the Increased or Improved Services requirement and consistent with *EC* Section 42238.02, long-term English learners are included in the English learner student group.

Statutory Requirements

An LEA is required to demonstrate in its LCAP how it is increasing or improving services for its students who are foster youth, English learners, and/or low-income, collectively referred to as unduplicated students, as compared to the services provided to all students in proportion to the increase in funding it receives based on the number and concentration of unduplicated students in the LEA (*EC* Section 42238.07[a][1], *EC*

Section 52064[b][8][B]; 5 *CCR* Section 15496[a]). This proportionality percentage is also known as the "minimum proportionality percentage" or "MPP." The manner in which an LEA demonstrates it is meeting its MPP is two-fold: (1) through the expenditure of LCFF funds or through the identification of a Planned Percentage of Improved Services as documented in the Contributing Actions Table, and (2) through the explanations provided in the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.

To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are identified in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided across the entire LEA (LEA-wide action), provided to an entire school (Schoolwide action), or solely provided to one or more unduplicated student group(s) (Limited action).

Therefore, for *any* action contributing to meet the increased or improved services requirement, the LEA must include an explanation of:

- How the action is increasing or improving services for the unduplicated student group(s) (Identified Needs and Action Design), and
- How the action meets the LEA's goals for its unduplicated pupils in the state and any local priority areas (Measurement of Effectiveness).

LEA-wide and Schoolwide Actions

In addition to the above required explanations, LEAs must provide a justification for why an LEA-wide or Schoolwide action is being provided to all students and how the action is intended to improve outcomes for unduplicated student group(s) as compared to all students.

- Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient.

- Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increased or improved services standard because enrolling students is not the same as serving students.

For School Districts Only

Actions provided on an **LEA-wide** basis at **school districts with an unduplicated pupil percentage of less than 55 percent** must also include a description of how the actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Actions provided on a **Schoolwide** basis for **schools with less than 40 percent enrollment of unduplicated pupils** must also include a description of how these actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Requirements and Instructions

Complete the tables as follows:

Total Projected LCFF Supplemental and/or Concentration Grants

- Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of foster youth, English learner, and low-income students. This amount includes the Additional 15 percent LCFF Concentration Grant.

Projected Additional 15 percent LCFF Concentration Grant

- Specify the amount of additional LCFF concentration grant add-on funding, as described in *EC* Section 42238.02, that the LEA estimates it will receive in the coming year.

Projected Percentage to Increase or Improve Services for the Coming School Year

- Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 *CCR* Section 15496(a)(7).

LCFF Carryover — Percentage

- Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

LCFF Carryover — Dollar

- Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero ($0).

Total Percentage to Increase or Improve Services for the Coming School Year

- Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEA's percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 *CCR* Section 15496(a)(7).

Required Descriptions:

LEA-wide and Schoolwide Actions

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

If the LEA has provided this required description in the Action Descriptions, state as such within the table.

Complete the table as follows:

Identified Need(s)

Provide an explanation of the unique identified need(s) of the LEA's unduplicated student group(s) for whom the action is principally directed.

An LEA demonstrates how an action is principally directed towards an unduplicated student group(s) when the LEA explains the need(s), condition(s), or circumstance(s) of the unduplicated student group(s) identified through a needs assessment and how the action addresses them. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

How the Action(s) are Designed to Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis

Provide an explanation of how the action as designed will address the unique identified need(s) of the LEA's unduplicated student group(s) for whom the action is principally directed and the rationale for why the action is being provided on an LEA-wide or schoolwide basis.

- As stated above, conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient.
- Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increased or improved services standard because enrolling students is not the same as serving students.

Metric(s) to Monitor Effectiveness

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

Note for COEs and Charter Schools: In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

Limited Actions

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

If the LEA has provided the required descriptions in the Action Descriptions, state as such.

Complete the table as follows:

Identified Need(s)

Provide an explanation of the unique need(s) of the unduplicated student group(s) being served identified through the LEA's needs assessment. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

How the Action(s) are Designed to Address Need(s)

Provide an explanation of how the action is designed to address the unique identified need(s) of the unduplicated student group(s) being served.

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Metric(s) to Monitor Effectiveness

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

For any limited action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage, as applicable.

- For each action with an identified Planned Percentage of Improved Services, identify the goal and action number and describe the methodology that was used.

- When identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

- For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which, based on the LEA's current pay scale, the LEA estimates would cost $165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of $165,000 by the amount of LCFF Funding identified in the Total Planned Expenditures Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

Additional Concentration Grant Funding

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

An LEA that receives the additional concentration grant add-on described in *EC* Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

- An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.

- Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.

- An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as a single-school LEA or an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.

- In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA.

    - The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA.

    - The staff-to-student ratio must be based on the number of full-time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.

- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA.

    - The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA.

    - The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

Action Tables

Complete the Total Planned Expenditures Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Total Planned Expenditures Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. The word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)
- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2024–25 LCAP, 2024–25 will be the coming LCAP Year and 2023–24 will be the current LCAP Year.

Total Planned Expenditures Table

In the Total Planned Expenditures Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year**: Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant**: Provide the total amount estimated LCFF entitlement for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program, the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 *CCR* Section 15496(a)(8). Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs.

  See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.
- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 *CCR* Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.
- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover —

Percentage. ***This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.***

- **Goal #**: Enter the LCAP Goal number for the action.
- **Action #**: Enter the action's number as indicated in the LCAP Goal.
- **Action Title**: Provide a title of the action.
- **Student Group(s)**: Indicate the student group or groups who will be the primary beneficiary of the action by entering "All," or by entering a specific student group or groups.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services requirement; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services requirement.
- If "Yes" is entered into the Contributing column, then complete the following columns:
    - **Scope**: The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.
    - **Unduplicated Student Group(s)**: Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
    - **Location**: Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate "All Schools." If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter "Specific Schools" or "Specific Grade Spans." Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.
- **Time Span**: Enter "ongoing" if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter "1 Year," or "2 Years," or "6 Months."
- **Total Personnel**: Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel**: This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.

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- **LCFF Funds**: Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA's total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
    - **Note:** For an action to contribute towards meeting the increased or improved services requirement, it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds**: Enter the total amount of Other State Funds utilized to implement this action, if any.
    - **Note:** Equity Multiplier funds must be included in the "Other State Funds" category, not in the "LCFF Funds" category. As a reminder, Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the ELO-P, the LCRS, and/or the CCSPP. This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LEA's LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.
- **Local Funds**: Enter the total amount of Local Funds utilized to implement this action, if any.
- **Federal Funds**: Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds**: This amount is automatically calculated based on amounts entered in the previous four columns.
- **Planned Percentage of Improved Services**: For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.
    - As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

      For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which, based on the LEA's current pay scale, the LEA estimates would cost $165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of $165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the 'Contributing to Increased or Improved Services?' column will need to be checked to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses.

Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures**: Enter the total estimated actual expenditures to implement this action, if any.

Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the 'Contributing to Increased or Improved Services?' column to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated based on the number and concentration of unduplicated students in the current school year.
- **Estimated Actual Expenditures for Contributing Actions**: Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.
- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).
    - Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been $169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of $169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant**: Provide the total amount of estimated LCFF Target Entitlement for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program,

the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 *CCR* Section 15496(a)(8). Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs. See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.

- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 *CCR* Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

Contributing Actions Table

- **4. Total Planned Contributing Expenditures (LCFF Funds)**
    - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column.
- **5. Total Planned Percentage of Improved Services**
    - This percentage is the total of the Planned Percentage of Improved Services column.
- **Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)**
    - This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

Contributing Actions Annual Update Table

Pursuant to *EC* Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- **6. Estimated Actual LCFF Supplemental and Concentration Grants**

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- This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on the number and concentration of unduplicated students in the current school year.

- **4. Total Planned Contributing Expenditures (LCFF Funds)**
  - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds).
- **7. Total Estimated Actual Expenditures for Contributing Actions**
  - This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds).
- **Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)**
  - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4).
- **5. Total Planned Percentage of Improved Services (%)**
  - This amount is the total of the Planned Percentage of Improved Services column.
- **8. Total Estimated Actual Percentage of Improved Services (%)**
  - This amount is the total of the Estimated Actual Percentage of Improved Services column.
- **Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)**
  - This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8).

LCFF Carryover Table

- **10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 plus Carryover %)**
  - This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.
- **11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)**
  - This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).
- **12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)**

- If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

  The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.

- **13. LCFF Carryover — Percentage (12 divided by 9)**

  - This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education
November 2024

Local Control and Accountability Plan (LCAP)
Every Student Succeeds Act (ESSA)
Federal Addendum Template

School Year
2026-2027

Date of Board Approval
6/18/26

LEA Name
Sage Oak Charter School

CDS Code:
36-67736-0136069

Link to the LCAP:
(optional)

For which ESSA programs apply to your LEA?

Choose From:

TITLE I, PART A
Improving Basic Programs Operated by State and Local Educational Agencies

TITLE II, PART A
Supporting Effective Instruction

TITLE IV, PART A
Student Support and Academic Enrichment Grants

*(**note:** This list only includes ESSA programs with LEA plan requirements; not all ESSA programs.)*

In the following pages, ONLY complete the sections for the corresponding programs.

Instructions

The LCAP Federal Addendum is meant to supplement the LCAP to ensure that eligible LEAs have the opportunity to meet the Local Educational Agency (LEA) Plan provisions of the ESSA.

The LCAP Federal Addendum Template must be completed and submitted to the California Department of Education (CDE) to apply for ESSA funding**.** LEAs are encouraged to review the LCAP Federal Addendum annually with their LCAP, as ESSA funding should be considered in yearly strategic planning.

The LEA must address the Strategy and Alignment prompts provided on the following page.

Each provision for each program must be addressed unless the provision is not applicable to the LEA.

In addressing these provisions, LEAs must provide a narrative that addresses the provision **within the LCAP Federal Addendum Template.**

Under State Priority Alignment, state priority numbers are provided to demonstrate where an ESSA provision aligns with state priorities. This is meant to assist LEAs in determining where ESSA provisions may already be addressed in the LEA's LCAP, as it demonstrates the LEA's efforts to support the state priorities.

The CDE emphasizes that **the LCAP Federal Addendum should not drive LCAP development.** ESSA funds are supplemental to state funds, just as the LCAP Federal Addendum supplements your LCAP. **LEAs are encouraged to integrate their ESSA funds into their LCAP development as much as possible to promote strategic planning of all resources**; however, this is not a requirement. In reviewing the LCAP Federal Addendum, staff will evaluate the LEA's responses to the ESSA plan provisions. There is no standard length for the responses. LEAs will be asked to clarify insufficient responses during the review process.

This template is designed to be used by LEAs who already have completed their LCAP Federal Addendum and received approval from CDE. This template will support LEAs with the review of their LCAP Federal Addendum and revision.

The review and revision of the LCAP Federal Addendum do not need to be submitted to CDE for approval. However, an LEA should have their local Board approve any revisions.

Even if the LEA plans to transfer all of its title funds, it must still address all of the provisions of the title from which it is transferring its funds. The LEA must first meet the application requirements of those funds before it can elect to transfer those funds to another title.

California's ESSA State Plan significantly shifts the state's approach to the utilization of federal resources in support of underserved student groups. This LCAP Federal Addendum provides LEAs with the opportunity to document their approach to maximizing the impact of federal investments in support of underserved students.

The implementation of ESSA in California presents an opportunity for LEAs to innovate with their federally-funded programs and align them with the priority goals they are realizing under the state's Local Control Funding Formula (LCFF).

LCFF provides LEAs flexibility to design programs and provide services that meet the needs of students in order to achieve readiness for college, career, and lifelong learning. The LCAP planning process supports continuous cycles of action, reflection, and improvement.

Please respond to the prompts below, and in the pages that follow, to describe the LEA's plan for making the best use of federal ESEA resources in alignment with other federal, state, and local programs as described in the LEA's LCAP.

Strategy

Explain the LEA's strategy for using federal funds to supplement and enhance local priorities or initiatives funded with state funds, as reflected in the LEA's LCAP. This shall include describing the rationale/evidence for the selected use(s) of federal funds within the context of the LEA's broader strategy reflected in the LCAP.

Sage Oak Charter School strategically utilizes federal funds to supplement and enhance local priorities and initiatives funded with state funds, as detailed in our Local Control and Accountability Plan (LCAP). This strategic allocation ensures that federal resources are effectively supporting specific goals within our school community, aligning closely with our broader educational objectives.

Federal funds under Title I, Part A are targeted toward Goal 1 actions aimed at enhancing College and Career Readiness programs. These funds specifically support socioeconomically disadvantaged students by enhancing academic interventions and providing resources that facilitate both college and career readiness. For Goal 2, Title II, Part A funds are allocated to augment professional development programs, including extensive training for educators on differentiated instruction and effective strategies to engage students with diverse learning needs. This ensures that our teaching staff can implement the educational strategies identified in the LCAP effectively. Additionally, under Goal 3, Title IV, Part A funds align with the focus on leveraging technologies to enhance personalized learning pathways. These funds support the integration of advanced technological tools and programs that support a well-rounded education, including enhancing STEM education, supporting arts programs, and providing comprehensive mental health services.

The rationale behind these specific allocations of federal funds is supported by research that shows targeted interventions in areas such as reading and math can close achievement gaps, particularly for low-income students. Studies consistently indicate a strong correlation between teacher qualifications, their ongoing professional development, and student success. This underscores the necessity of equipping teachers with advanced skills and knowledge. Furthermore, engagement in arts and STEM has been linked to higher academic performance and motivation, while robust mental health support is essential for overall student success and well-being.

By ensuring that federal funds are aligned with the specific goals and actions outlined in our LCAP, Sage Oak Charter School maximizes the impact of these resources. This approach not only meets federal and state compliance requirements but also significantly advances our mission to provide a high-quality, equitable, and comprehensive education to all students, fostering both academic excellence and personal growth.

Alignment

Describe the efforts that the LEA will take to align use of federal funds with activities funded by state and local funds and, as applicable, across different federal grant programs.

Sage Oak Charter School ensures the effective alignment of federal funds with activities funded by state and local funds, and where applicable, across different federal grant programs, through a series of strategic efforts:

We engage in an integrated planning and budgeting process that includes stakeholders from all levels of the organization. This collaborative approach ensures that all sources of funding—federal, state, and local—are considered collectively to create a unified resource allocation strategy. This integrated planning is crucial for aligning the objectives across different funding streams and maximizing the impact of each dollar spent.

In addition, we coordinate activities across different federal grant programs, such as Title I, Title II, and Title IV, to leverage synergies and amplify the effects of these funds. By identifying overlapping goals and complementary activities, resources from these programs can be pooled to support broader educational initiatives, enhancing the cohesion and effectiveness of our efforts.

Our decision-making process is strongly data-driven, relying on regular data collection and analysis to assess the effectiveness of funded programs and to adjust strategies as necessary. This allows us to align federal funds closely with

the specific needs identified through state and local assessments, ensuring resources are targeted to areas of greatest need.

Stakeholder engagement is also a cornerstone of our approach. By involving a wide range of stakeholders, including parents, teachers, and community members, in the funding decision-making process, we ensure that the allocation of resources reflects the priorities and needs of our school community, thereby increasing the relevance and impact of the funded programs.

Lastly, continuous monitoring and regular reporting on the use and impact of funds ensure transparency and accountability. This not only helps in making necessary adjustments to align the use of federal, state, and local funds effectively but also ensures that activities across different federal grant programs are well-coordinated and directed toward our common educational goals.

Through these efforts, Sage Oak Charter School fosters a strategic and effective use of all funding sources, ensuring that federal funds not only meet regulatory requirements but also significantly enhance our educational initiatives funded by state and local revenues. This strategic alignment supports our overarching goal of providing high-quality, equitable, and comprehensive education to all students

ESSA Provisions Addressed Within the LCAP

Within the LCAP an LEA is required to describe its goals and the specific actions to achieve those goals, for each of the LCFF state priorities. In an approvable LCAP, it will be apparent from the descriptions of the goals, actions, and services how an LEA is acting to address the following ESSA provisions through the aligned LCFF state priorities and/or the state accountability system.

TITLE I, PART A

Monitoring Student Progress Towards Meeting Challenging State Academic Standards

ESSA SECTION	STATE PRIORITY ALIGNMENT
1112(b)(1) (A–D)	1, 2, 4, 7, 8 *(as applicable)*

Describe how the LEA will monitor students' progress in meeting the challenging state academic standards by:

(A) developing and implementing a well-rounded program of instruction to meet the academic needs of all students;
(B) identifying students who may be at risk for academic failure;
(C) providing additional educational assistance to individual students the LEA or school determines need help in meeting the challenging State academic standards; and
(D) identifying and implementing instructional and other strategies intended to strengthen academic programs and improve school conditions for student learning.

Overuse in Discipline Practices that Remove Students from the Classroom

ESSA SECTION	STATE PRIORITY ALIGNMENT
1112(b)(11)	6 *(as applicable)*

Describe how the LEA will support efforts to reduce the overuse of discipline practices that remove students from the classroom, which may include identifying and supporting schools with high rates of discipline, disaggregated by each of the student groups, as defined in Section 1111(c)(2).

Career Technical and Work-based Opportunities

ESSA SECTION	STATE PRIORITY ALIGNMENT
1112(b)(12)(A–B)	2, 4, 7 *(as applicable)*

If determined appropriate by the LEA, describe how such agency will support programs that coordinate and integrate:

(A) academic and career and technical education content through coordinated instructional strategies, that may incorporate experiential learning opportunities and promote skills attainment important to in-demand occupations or industries in the State; and
(B) work-based learning opportunities that provide students in-depth interaction with industry professionals and, if appropriate, academic credit.

TITLE II, PART A

Title II, Part A Activities

ESSA SECTION	STATE PRIORITY ALIGNMENT
2102(b)(2)(A)	1, 2, 4 *(as applicable)*

Provide a description of the activities to be carried out by the LEA under this Section and how these activities will be aligned with challenging State academic standards.

TITLE III, PART A

Parent, Family, and Community Engagement

ESSA SECTION	STATE PRIORITY ALIGNMENT
3116(b)(3)	3, 6 *(as applicable)*

Describe how the eligible entity will promote parent, family, and community engagement in the education of English learners.

ESSA Provisions Addressed in the Consolidated Application and Reporting System

An LEA addresses the following ESSA provision as part of completing annual reporting through the Consolidated Application and Reporting System (CARS).

TITLE I, PART A

Poverty Criteria

ESSA SECTION(S)	STATE PRIORITY ALIGNMENT
1112(b)(4)	N/A

Describe the poverty criteria that will be used to select school attendance areas under Section 1113.

Sage Oak utilizes specific poverty criteria under Section 1113, in compliance with the Every Student Succeeds Act (ESSA) provisions detailed in Title I, Part A. This process is part of our annual reporting through the Consolidated Application and Reporting System (CARS), ensuring transparency and adherence to federal guidelines.

As a nonclasroom-based charter school, we operate as a single LEA. We use the percentage of students eligible for the Household Data Collection (HDC) as our primary poverty criterion. Additionally, we consider other socio-economic indicators such as parental income levels. By combining these data points, Sage Oak can more accurately identify student groups that require additional support, allowing for more targeted resource allocation. This method provides a comprehensive measure of socio-economic disadvantage within our community.

This approach not only helps in directing resources to improve educational equity but also aligns with our broader commitment to providing supportive educational environments for all students, particularly those facing economic challenges. Through careful and systematic analysis of poverty indicators, Sage Oak ensures that federal funding is utilized effectively to enhance educational opportunities and outcomes for our most disadvantaged populations.

ESSA Provisions Not Addressed in the LCAP

For the majority of LEAs, the ESSA provisions on the following pages do not align with state priorities. **Each provision for each program provided on the following pages must be addressed** unless the provision is not applicable to the LEA. In addressing these provisions, LEAs must provide a narrative that addresses the provision **within this addendum**.

As previously stated, the CDE emphasizes that the LCAP Federal Addendum should not drive LCAP development. ESSA funds are supplemental to state funds, just as the LCAP Federal Addendum supplements your LCAP. **LEAs are encouraged to integrate their ESSA funds into their LCAP** development as much as possible to promote strategic planning of all resources; however, this is not a requirement. In reviewing the LCAP Federal Addendum, staff will evaluate the LEA's responses to the ESSA plan provisions. There is no standard length for the responses. LEAs will be asked to clarify insufficient responses during the review process.

TITLE I, PART A

Educator Equity

ESSA SECTION 1112(b)(2) – *Not Applicable to Charters and Single School Districts.*

Describe how the LEA will identify and address, as required under State plans as described in Section 1111(g)(1)(B), any disparities that result in low-income students and minority students being taught at higher rates than other students by ineffective, inexperienced, or out-of-field teachers.

NOTE: In this section, LEAs must identify and address disparities. Tools on the CDEs website (https://www.cde.ca.gov/pd/ee/peat.asp) can help with this process. LEAs are required to specifically address the following at comparable sites:

1. What # and % of teachers at sites are inexperienced, misassigned, or out-of-field in relation to:
    a. Number of low-income students
    b. Number of minority students
2. Does the LEA have an educator equity gap –
    a. If yes, must create a plan which must include root cause analysis of the disparity
    b. A plan must be created with meaningful educational partner engagement.

Educator Equity Data Tables available here:

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THIS ESSA PROVISION IS ADDRESSED BELOW:

n/a

On November 6, 2019, the SBE approved updated definitions for "ineffective" and "out-of-field" teachers to be included in the amended California ESSA Consolidated State Plan.

Term	Definition
Ineffective teacher	An ineffective teacher is any of the following: • An individual whose assignment is legally authorized by an emergency permit that does not require possession of a full teaching license; or • A teacher who holds a teaching credential but does not possess a permit or authorization that temporarily allows them to teach outside of their credentialed area (misassigned)

	• An individual who holds no credential, permit, or authorization to teach in California. Under this definition, teachers with the following limited emergency permits would be considered ineffective: • **Provisional Internship Permits,** • **Short-Term Staff Permits** • **Variable Term Waivers** **Substitute permits or Teaching Permits for Statutory Leave (TSPL) holders serving as the teacher of record**
Out-of-field teacher	A credentialed out-of-field teacher is: A credentialed teacher who has not yet demonstrated subject matter competence in the subject area(s) or for the student population to which he or she is assigned. Under this definition, the following limited permits will be considered out of the field: • General Education Limited Assignment Permit (GELAP) • Special Education Limited Assignment Permit (SELAP) • **Short-Term Waivers** • **Emergency English Learner or Bilingual Authorization Permits** **Local Assignment Options** (except for those made pursuant to the *California Code of Regulations*, Title 5, Section 80005[b])
Inexperienced Teacher	A teacher who has two or fewer years of teaching experience.
Minority Student	A student who is American Indian/Alaska Native, Asian, African American, Filipino, Native Hawaiian/Pacific Islander, Hispanic, or Two or More Races Not Hispanic.
Low-Income Student	A student who is eligible to receive Free or Reduced-Price Meals

Parent and Family Engagement

ESSA SECTIONS 1112(b)(3) and 1112(b)(7)

Describe the strategy the LEA will use to implement effective parent and family engagement under Section 1116.

Sage Oak implements effective parent and family engagement through strategic communication and collaborative initiatives under Section 1116. We have established a comprehensive engagement policy, developed with direct input from parents, ensuring that strategies are aligned with the needs and expectations of our school community. This policy guides our efforts to provide parents with clear, accessible information about academic standards, assessments, and student progress, empowering them to support their children's education effectively.

Our approach includes providing resources to help parents understand curriculum demands and enhance their ability to assist with learning activities. We also educate our staff on the importance of parental involvement, training them to engage with families as equal partners in education. Through regular updates and transparent communication, we keep parents informed and involved in school activities, decision-making processes, and the development of support plans for students.

Additionally, Sage Oak integrates parent and family engagement strategies with other federal, state, and local programs to enhance the educational support network available to our students.

To meet this requirement, LEAs must provide a description of the following:

ESSA Section 1112(b)(3): how the LEA will carry out its responsibilities under paragraphs (1) and (2) of Section 1111(d);

1. How the LEA will involve parents and family members at identified schools in jointly developing Comprehensive Support and Improvement plans
2. How the LEA will involve parents and family members in identified schools in jointly developing the Targeted Support and Improvement plans
3. In the absence of the identification of any schools for Comprehensive Support and Improvement (CSI) or any schools for Targeted Assistance and Intervention (TSI), the LEA may write N/A. This provision will not be reviewed.

ESSA Section 1112(b)(7): the strategy the LEA will use to implement effective parent and family engagement under Section 1116; shall include how the LEA and its schools will build capacity for parent and family engagement by:

1. Describe the LEA parent and family engagement policy, and how it was developed jointly with, agree on with, and distribute to, parents and family members of participating children a written parent and family engagement policy (ESSA Section 1116(a)).
2. Describe how the LEA will provide assistance to parents of children served by the school or local educational agency, as appropriate, in understanding such topics as the challenging State academic standards, State and local academic assessments, the requirements of this part, and how to monitor a child's progress and work with educators to improve the achievement of their children; (ESSA Section 1116(e)(1))
3. Describe how the LEA will provide materials and training to help parents to work with their children to improve their children's achievement, such as literacy training and using technology (including education about the harms of copyright piracy), as appropriate, to foster parental involvement; (ESSA Section 1116(e)(2))
4. Describe how the LEA will educate teachers, specialized instructional support personnel, principals, other school leaders, and other staff, with the assistance of parents, in the value and utility of contributions of parents, and in how to reach out to, communicate with, and work with parents as equal partners, implement and coordinate parent programs, and build ties between parents and the school; (ESSA Section 1116(e)(3))
5. Describe how the LEA will to the extent feasible and appropriate, coordinate and integrate parent involvement programs and activities with other Federal, State, and local programs, including public preschool programs, and conduct other activities, such as parent resource centers, that encourage and support parents in more fully participating in the education of their children; (ESSA Section 1116(e)(4))
6. Describe how the LEA will ensure that information related to school and parent programs, meetings, and other activities is sent to the parents of participating children in a format and, to the extent practicable, in a language the parents can understand (ESSA Section 1116(e)(5))
7. Describe how the LEA will provide such other reasonable support for parental involvement activities as parents may request (ESSA Section 1116(e)(14).
8. Describe how the LEA will provide opportunities for the informed participation of parents and family members (including parents and family members who have limited English proficiency, parents and family members with disabilities, and parents and family members of migratory children), including providing information and school reports in a format and, to the extent practicable, in a language, such parents understand (ESSA Section 1116(f)).

Also, include how the LEA will align parent involvement required in Section 1116 with the LCAP educational partner engagement process.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Sage Oak is dedicated to enhancing engagement through a comprehensive strategy that ensures the active participation of parents and families in their children's education. Our approach aligns with Section 1116 of ESSA, focusing on creating inclusive, supportive, and informative engagement practices that bridge communication gaps between the school and home environments. This alignment is seamlessly integrated with our LCAP educational partner engagement process, ensuring a unified approach to stakeholder involvement.

We have developed a robust parent and family engagement policy in close collaboration with families, ensuring it reflects their needs and perspectives. This policy is approved by the parent advisory committee and distributed annually emphasizing clarity and comprehensibility. To assist parents in understanding the challenging state academic standards, state and local academic assessments, and other educational requirements, we provide informational sessions that are crucial for empowering them to support their children's academic progress effectively.

At Sage Oak, we prioritize making education accessible and engaging. Our staff is trained to value and integrate parental contributions, working with parents as equal partners in the educational process. Our parent involvement programs are coordinated with other federal, state, and local services, enhancing the resources available to our families.

Through regular updates and proactive communication using various platforms—including emails, our website, and social media—we ensure that all families are well-informed and prepared to participate in school activities and decision-making processes. Our engagement strategies are aligned with our LCAP goals, ensuring that parental input is an integral part of our educational planning and evaluation processes.

In aligning these efforts with our LCAP educational partner engagement process, we ensure that parent and family engagement strategies are integral to our broader educational planning. This involves incorporating parent feedback into LCAP development and review, ensuring that our strategic planning reflects the community's voice and needs. By integrating the requirements of Section 1116 into our LCAP process, we enhance the educational experience for all students and foster a supportive community that is deeply involved in our educational mission. This approach is consistent with Sage Oak's educational model, which emphasizes personalized, flexible learning environments that engage and empower our students and their families.

Schoolwide Programs, Targeted Support Programs, and Programs for Neglected or Delinquent Children

ESSA SECTIONS 1112(b)(5) and 1112(b)(9)

Describe, in general, the nature of the programs to be conducted by the LEA’s schools under sections 1114 and 1115 and, where appropriate, educational services outside such schools for children living in local institutions for neglected or delinquent children, and for neglected and delinquent children in community day school programs.

At Sage Oak, we are committed to providing a wide array of programs under sections 1114 and 1115 of ESSA, designed to support and enhance the educational experiences of all students, including those who are neglected or delinquent. These programs are tailored to meet the diverse needs of our student population and are implemented with the goal of ensuring every student has access to high-quality education that prepares them for success in college, career, and life.

Our schoolwide programs focus on comprehensive strategies that improve the entire educational program, making them more responsive to the needs of our students, particularly those who are at risk of failing academic standards. These programs integrate various funding sources to support initiatives such as enhanced instructional methods, integrated technology, and expanded professional development for teachers. The overarching goal is to raise the academic achievement of all students by improving the entire school's instructional and operational effectiveness.

For students specifically identified as needing extra academic support, we have targeted assistance programs. These programs provide supplementary educational services to help raise the academic achievement of students at risk of failing. Services include personalized tutoring, intervention programs in reading and math, credit recovery courses, and additional support services tailored to the needs of individual students. These targeted efforts focus on students who are the furthest from meeting the standards the school sets for all children.

If applicable, for children living in local institutions for the neglected or delinquent, Sage Oak will offer educational services designed to address their unique educational and social-emotional needs. These services will include tailored curricula that focus on core academic subjects, life skills education, and social-emotional learning opportunities. We will collaborate with local agencies and institutions to ensure that these students receive a coordinated approach to support that includes academic tutoring, mentoring, and counseling services.

The implementation of these programs is closely monitored to assess their effectiveness in improving educational outcomes. Adjustments are made based on ongoing evaluations and feedback from students, parents, and educational staff. By aligning these initiatives with our LCAP goals, Sage Oak ensures that federal funds are used strategically to supplement and enhance our state-funded initiatives, thereby providing a cohesive and integrated educational experience for all students.

Describe how teachers and school leaders, in consultation with parents, administrators, paraprofessionals, and specialized instructional support personnel, in schools operating a targeted assistance school program under Section 1115, will identify the eligible children most in need of services under this part.

THIS ESSA PROVISION IS ADDRESSED BELOW:

At Sage Oak Charter School, identifying students most in need of services under the targeted assistance school program outlined in Section 1115 is a collaborative and data-driven process, tailored to our independent study model. This approach involves a broad spectrum of the school community to ensure that the support provided is comprehensively tailored to the individual needs of each student.

The identification process begins with an analysis of academic performance data, including standardized test results, progress in coursework, teacher evaluations, and other relevant assessments. We also consider factors such as engagement levels in learning activities, progress in personalized learning plans, and any social-emotional assessments to ensure a holistic view of each student's needs.

Teachers and school leaders work in consultation with parents, administrators, and specialized instructional support personnel to review and discuss the data collected. This collaborative dialogue is crucial as it helps integrate insights from various perspectives, particularly from parents who provide vital information about their child's learning environment and any external factors influencing their educational experience.

The team prioritizes students based on the urgency and severity of their needs. The criteria for this prioritization include the extent of academic challenges, the potential impact of additional support on the student’s educational outcomes, and the capacity of our resources to effectively address these needs.

This collaborative and data-informed approach ensures that the targeted assistance provided is directly responsive to the most pressing needs of our students. By maintaining regular communication and strategic meetings with all stakeholders involved, Sage Oak sustains a dynamic and adaptable support system that enhances educational outcomes and overall student well-being in a non-classroom based setting.

Homeless Children and Youth Services

ESSA SECTION 1112(b)(6)

Describe the services the LEA will provide homeless children and youths, including services provided with funds reserved under Section 1113(c)(3)(A), to support the enrollment, attendance, and success of homeless children and youths, in coordination with the services the LEA is providing under the McKinney-Vento Homeless Assistance Act (42 United States Code 11301 et seq.).

THIS ESSA PROVISION IS ADDRESSED BELOW:

At Sage Oak, we are committed to supporting the educational needs of homeless children and youth through a comprehensive approach that aligns with the McKinney-Vento Homeless Assistance Act. Our strategy ensures that these students have equal access to educational opportunities and are supported in their enrollment, attendance, and academic success.

To address the challenges faced by homeless students, Sage Oak provides specific services designed to remove barriers to their education. This includes ensuring immediate enrollment even when students do not have access to required documents typically necessary for school entry. We provide assistance with obtaining academic and medical records, and we offer school supplies and materials at no cost to the families. We also reserve a portion of our federal funds under Section 1113(c)(3)(A) to support additional services tailored to the needs of homeless students.

In collaboration with services provided under the McKinney-Vento Act, our school appoints a liaison for homeless students to help coordinate these efforts. This liaison works directly with students and families to identify their specific needs and connect them with available resources. They also work with school staff to raise awareness about the challenges faced by homeless students and to train staff on how to best support these students in an educational setting.

Through these coordinated efforts, Sage Oak Charter School strives to create a supportive environment that mitigates the impact of homelessness on students' education, ensuring that all students have the opportunity to succeed and thrive academically.

Student Transitions

ESSA SECTIONS 1112(b)(8), 1112(b)(10), and 1112(b)(10) (A–B)

Describe, if applicable, how the LEA will support, coordinate, and integrate services provided under this part with early childhood education programs at the LEA or individual school level, including plans for the transition of participants in such programs to local elementary school programs.

n/a

Describe, if applicable, how the LEA will implement strategies to facilitate effective transitions for students from middle grades to high school and from high school to postsecondary education including:

(A) through coordination with institutions of higher education, employers, and other local partners; and

(B) through increased student access to early college high school or dual or concurrent enrollment opportunities, or career counseling to identify student interests and skills.

THIS ESSA PROVISION IS ADDRESSED BELOW:

At Sage Oak, we recognize the importance of smooth transitions for students moving from middle grades to high school and from high school to postsecondary education. Our strategies are designed to support these critical transitions, ensuring that our students are well-prepared for each new phase of their educational journey.

Key to facilitating the transition from middle grades to high school, Sage Oak ensures our curriculum aligns with the latest academic standards and opportunities. Additionally, we engage with local employers and community partners to provide students with relevant insights into various career paths and the skills required in the workforce, enriching our curriculum with practical applications and real-world relevance.

For students transitioning from high school to postsecondary education or careers, Sage Oak offers robust programs designed to enhance college and career readiness. This includes increased access to early college high school programs, dual or concurrent enrollment opportunities, and comprehensive career counseling services. Our educational advisors play a crucial role in this process, working individually with students to create personalized learning plans that reflect their academic and career goals. These plans are instrumental in navigating course selections, extracurricular activities, and appropriate early college opportunities, tailored to each student's unique interests and skills. Additionally, we are actively increasing our Career and Technical Education (CTE) pathways to include new areas such as Child Development, Sports Medicine, and Arts, Media, and Entertainment (AME), offering students practical and varied career training options that align with their personal interests and market demands. We maintain up-to-date knowledge of University of California (UC) and California State University (CSU) requirements, as well as offerings at community colleges, to guide our students effectively through their educational pathways.

In addition to these transition strategies, our commitment under LCAP Action 1:4 involves developing unified articulation processes that seamlessly transition students through each grade band. This includes integrating critical feedback from graduates and their families to enhance the continuity and relevance of our curriculum, further ensuring our students are prepared for the expectations and challenges of their subsequent educational stages.

Sage Oak’s proactive approach ensures that our students are not only aware of their postsecondary options but are also equipped to make informed decisions about their futures. By staying abreast of the latest educational requirements and offerings and implementing these strategies in coordination with higher education institutions, employers, and local partners, we prepare our students to successfully navigate the transitions between educational stages, fully equipped with the knowledge, skills, and qualifications needed to thrive in their chosen paths.

Additional Information Regarding Use of Funds Under this Part

ESSA SECTION 1112(b)(13) (A–B)

Provide any other information on how the LEA proposes to use funds to meet the purposes of this part, and that the LEA determines appropriate to provide, which may include how the LEA will:

(A) assist schools in identifying and serving gifted and talented students; and
(B) assist schools in developing effective school library programs to provide students an opportunity to develop digital literacy skills and improve academic achievement.

THIS ESSA PROVISION IS ADDRESSED BELOW:

n/a

TITLE I, PART D

Description of Program
ESSA SECTION 1423(1)

Provide a description of the program to be assisted [by Title I, Part D].

THIS ESSA PROVISION IS ADDRESSED BELOW:

Formal Agreements
ESSA SECTION 1423(2)

Provide a description of formal agreements, regarding the program to be assisted, between the
(A) LEA; and
(B) correctional facilities and alternative school programs serving children and youth involved with the juvenile justice system, including such facilities operated by the Secretary of the Interior and Indian tribes.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Comparable Education Program
ESSA SECTION 1423(3)

As appropriate, provide a description of how participating schools will coordinate with facilities working with delinquent children and youth to ensure that such children and youth are participating in an education program comparable to one operating in the local school such youth would attend.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Successful Transitions
ESSA SECTION 1423(4)

Provide a description of the program operated by participating schools to facilitate the successful transition of children and youth returning from correctional facilities and, as appropriate, the types of services that such schools will provide such children and youth and other at-risk children and youth.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Educational Needs
ESSA SECTION 1423(5)

Provide a description of the characteristics (including learning difficulties, substance abuse problems, and other special needs) of the children and youth who will be returning from correctional facilities and, as appropriate, other at-risk children and youth expected to be served by the program, and a description of how the school will coordinate existing educational programs to meet the unique educational needs of such children and youth.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Social, Health, and Other Services
ESSA SECTION 1423(6)

As appropriate, provide a description of how schools will coordinate with existing social, health, and other services to meet the needs of students returning from correctional facilities, at-risk children or youth, and other participating children or youth, including prenatal health care and nutrition services related to the health of the parent and the child or youth, parenting and child development classes, child care, targeted reentry and outreach programs, referrals to community resources, and scheduling flexibility.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Postsecondary and Workforce Partnerships
ESSA SECTION 1423(7)

As appropriate, provide a description of any partnerships with institutions of higher education or local businesses to facilitate postsecondary and workforce success for children and youth returning from correctional facilities, such as through participation in credit-bearing coursework while in secondary school, enrollment in postsecondary education, participation in career and technical education programming, and mentoring services for participating students.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Parent and Family Involvement
ESSA SECTION 1423(8)

As appropriate, provide a description of how the program will involve parents and family members in efforts to improve the educational achievement of their children, assist in dropout prevention activities, and prevent the involvement of their children in delinquent activities.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Program Coordination
ESSA SECTION 1423(9–10)

Provide a description of how the program under this subpart will be coordinated with other Federal, State, and local programs, such as programs under title I of the Workforce Innovation and Opportunity Act and career and technical education programs serving at-risk children and youth.

Include how the program will be coordinated with programs operated under the Juvenile Justice and Delinquency Prevention Act of 1974 and other comparable programs, if applicable.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Probation Officer Coordination
ESSA SECTION 1423(11)

As appropriate, provide a description of how schools will work with probation officers to assist in meeting the needs of children and youth returning from correctional facilities.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Individualized Education Program Awareness
ESSA SECTION 1423(12)

Provide a description of the efforts participating schools will make to ensure correctional facilities working with children and youth are aware of a child's or youth's existing individualized education program.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Alternative Placements
ESSA SECTIONS 1423(13)

As appropriate, provide a description of the steps participating schools will take to find alternative placements for children and youth interested in continuing their education but unable to participate in a traditional public school program.

THIS ESSA PROVISION IS ADDRESSED BELOW:

TITLE II, PART A

Professional Growth and Improvement

ESSA SECTION 2102(b)(2)(B)

Provide a description of the LEA's systems of professional growth and improvement, such as induction for teachers, principals, or other school leaders and opportunities for building the capacity of teachers and opportunities to develop meaningful teacher leadership.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Address these questions:

1. Please provide a description of the LEA's systems of professional growth and improvement for teachers, principals, and other school leaders.
2. Please address principals, teachers, and other school leaders separately.
3. Please explain how the systems promote professional growth and ensure improvement, including how the LEA measures growth and improvement
4. Please describe how the systems support principals, teachers, and other school leaders from the beginning of their careers, throughout their careers, and through advancement opportunities
5. Please describe how the LEA evaluates its systems of professional growth and improvement and makes adjustments to ensure continuous improvement within these systems.

At Sage Oak, our professional development strategy is crafted to support educators at every stage of their careers, ensuring they are well-prepared to meet the diverse needs of our student body. This strategy begins with induction for new teachers and extends through ongoing development opportunities, including participation in professional development conferences such as those provided by the California Charter Schools Association (CCSA) and Charter Schools Development Center (CSDC).

We also broaden our educators' training with specialized sessions such as AVID training to bolster college readiness and the UC conference to align with university standards. Also, our staff partakes in targeted professional development focused on special education, ensuring that they are proficient in the latest methodologies and practices.

Our efforts are further supported by Professional Learning Communities (PLCs) which foster collaborative learning and data-driven decision-making. This collaborative environment allows educators to share insights and strategies, enhancing educational practices. ??Live instruction training is another critical component of our professional development program, ensuring that our educators are proficient in engaging students effectively in a dynamic and increasingly digital learning environment.

In addition, we provide leadership development opportunities for advancement pathways, ensuring a continuous cycle of professional growth and leadership within our school community.

We continually assess the effectiveness of our professional development programs through regular feedback, allowing us to align our strategies closely with both our educational goals and the evolving needs of the school. This comprehensive approach not only supports the professional growth of our educators but also enhances the overall educational experience for our students, ensuring that every member of our school community is equipped to thrive in an ever-changing educational landscape.

Prioritizing Funding

ESSA SECTION 2102(b)(2)(C)

Provide a description of how the LEA will prioritize funds to schools served by the agency that are implementing comprehensive support and improvement activities and targeted support and improvement activities under Section 1111(d) and have the highest percentage of children counted under Section 1124(c).

Address these questions:

1. Please describe the LEA's process for determining Title II, Part A funding among the schools it serves.
2. Please describe how the LEA determines funding that prioritizes CSI and TSI schools and schools serving the highest percentage of children counted under Section 1124(c).
3. Please describe how CSI and TSI schools and schools that have the highest percentage of children counted under Section 1124(c) that the LEA serves receive priority in Title II, Part A funding decisions compared to other schools the LEA serves.

THIS ESSA PROVISION IS ADDRESSED BELOW:

n/a

Data and Ongoing Consultation to Support Continuous Improvement

ESSA SECTION 2102(b)(2)(D)

Provide a description of how the LEA will use data and ongoing consultation described in Section 2102(b)(3) to continually update and improve activities supported under this part.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Address these questions:

1. Please explain how the LEA coordinates its Title II, Part A activities with other related strategies, programs, and activities.
2. Please describe how the LEA uses data to continually update and improve activities supported under Title II, Part A.
3. Please describe how the LEA uses ongoing consultation described in Section 2102(b)(3) to continually update and improve activities supported under Title II, Part A.
4. Please describe the sources of data the LEA monitors to evaluate Title II, Part A activities and how often it analyzes this data.
5. Please describe the ways in which the LEA meaningfully consults with the following educational partners to update and improve Title II, Part A-funded activities:
    a. Teachers
    b. Principals and other school leaders
    c. Paraprofessionals (including organizations representing such individuals)
    d. Specialized instructional support personnel
    e. Charter school leaders (in a local educational agency that has charter schools)
    f. Parents
    g. Community partners
    h. Organizations or partners with relevant and demonstrated expertise in programs and activities
6. Please explain how often the LEA meaningfully consults with these educational partners.

At Sage Oak, our approach to continuous improvement under Title II, Part A, revolves around a robust system of data analysis and ongoing consultation. We integrate Title II activities with our broader educational strategies, ensuring alignment with our holistic educational goals, such as those outlined in our Local Control and Accountability Plan (LCAP).

We employ a data-driven approach to monitor and refine professional development activities. This includes regular analysis of student performance data, staff feedback on professional development sessions, and other relevant metrics. Our Professional Learning Communities (PLCs) play a crucial role here, enabling educators to discuss and implement strategies based on data insights.

Sage Oak conducts evaluations of Title II, Part A activities throughout the academic year. This regular monitoring allows us to stay responsive to the needs of our educators and students, adapting our strategies to maximize effectiveness.

Our consultation process is inclusive, involving a wide range of stakeholders. We engage with teachers, principals, specialized instructional support personnel, and charter school leaders to ensure diverse perspectives are considered. Community partners and organizations with relevant expertise are also involved, enriching our professional development programs.

By systematically integrating feedback and data into our professional development initiatives, Sage Oak Charter School ensures that our educational practices are not only aligned with current needs but are also poised for future success, fulfilling our commitment to continuous improvement.

TITLE III, PART A

Title III Professional Development
ESSA SECTION 3115(c)(2)

Describe how the eligible entity will provide effective professional development to classroom teachers, principals and other school leaders, administrators, and other school or community-based organizational personnel.

Complete responses will:

Address professional development activities specific to English learners/Title III purposes that are:

1. designed to improve the instruction and assessment of English learners;
2. designed to enhance the ability of such teachers, principals, and other school leaders to understand and implement curricula, assessment practices and measures, and instructional strategies for English learners;
3. effective in increasing children's English language proficiency or substantially increasing the subject matter knowledge, teaching knowledge, and teaching skills of such teachers;
4. of sufficient intensity and duration (which shall not include activities such as one-day or short-term workshops and conferences) to have a positive and lasting impact on the teachers' performance in the classroom; and
5. supplemental to all other funding sources for which the LEA is eligible.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Enhanced Instructional Opportunities
ESSA SECTIONS 3115(e)(1) and 3116

Describe how the eligible entity will provide enhanced instructional opportunities for immigrant children and youth.

Complete responses will:

1. Describe the activities implemented, supplemental to all other funding sources for which the LEA is eligible, that provide enhanced instructional opportunities for immigrant children and youth.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Title III Programs and Activities
ESSA SECTIONS 3116(b)(1)

Describe the effective programs and activities, including language instruction educational programs, proposed to be developed, implemented, and administered under the subgrant that will help English learners increase their English language proficiency and meet the challenging State academic standards.

Complete responses will:
1. Address the effective language instruction programs specific to English learners.
2. Address Title III activities that:
    - are focused on English learners and consistent with the purposes of Title III;
    - enhance the core program; and
    - are supplemental to all other funding sources for which the LEA is eligible.

THIS ESSA PROVISION IS ADDRESSED BELOW:

English Proficiency and Academic Achievement

ESSA SECTIONS 3116(b)(2)(A-B)

Describe how the eligible entity will ensure that elementary schools and secondary schools receiving funds under Subpart 1 assist English learners in:

(A) achieving English proficiency based on the State's English language proficiency assessment under Section 1111(b)(2)(G), consistent with the State's long-term goals, as described in Section 1111(c)(4)(A)(ii); and
(B) meeting the challenging State academic standards.

Complete responses will:

1. Address how sites will be held accountable for meeting English acquisition progress and achievement goals for English learners.
2. Address site activities that are supplemental to all other funding sources for which the LEA is eligible.

THIS ESSA PROVISION IS ADDRESSED BELOW:

TITLE IV, PART A

Title IV, Part A Activities and Programs

ESSA SECTION 4106(e)(1)

Each LEA, or consortium of LEAs, shall conduct the Title IV needs assessment once every 3 years. (see below)

Describe the activities and programming that the LEA, or consortium of such agencies, will carry out under Subpart 1, including a description of:

(A) any partnership with an institution of higher education, business, nonprofit organization, community-based organization, or other public or private entity with a demonstrated record of success in implementing activities under this subpart;
(B) if applicable, how funds will be used for activities related to supporting well-rounded education under Section 4107;
(C) if applicable, how funds will be used for activities related to supporting safe and healthy students under Section 4108;
(D) if applicable, how funds will be used for activities related to supporting the effective use of technology in schools under Section 4109; and
(E) the program objectives and intended outcomes for activities under Subpart 1, and how the LEA, or consortium of such agencies, will periodically evaluate the effectiveness of the activities carried out under this section based on such objectives and outcomes.

NOTE: If the LEA received more than $30,000 in Title IV, Part A funding and did not transfer the allocation, the LEA must:

1. use not less than 20 percent of Title IV, Part A funds to support one or more safe and healthy student activities;
2. use not less than 20 percent of Title IV, Part A funds to support one or more well-rounded education activities;
3. use a portion of Title IV, Part A funds to support one or more effective use of technology activities; and
   a) 15 percent max cap on effective use of technology for purchasing technology infrastructure.

THIS ESSA PROVISION IS ADDRESSED BELOW:

At Sage Oak, our utilization of Title IV, Part A funds is closely aligned with LCAP Goal 3, which focuses on enhancing our technological capabilities to support personalized learning and operational efficiency. We invest in innovative educational technologies, including the development and integration of AI-driven tools. These technologies are designed to tailor learning experiences to individual student needs and streamline administrative processes, thereby enhancing educational outcomes and operational efficacy.

Our objective with these funds is to not only integrate cutting-edge technology into our curriculum but also to ensure these tools effectively support our educational goals. We periodically evaluate the effectiveness of these technological interventions by analyzing student engagement metrics, academic performance data, and operational efficiency indicators. This ongoing assessment helps us refine our technology strategy to ensure it remains aligned with the evolving needs of our students and the broader educational landscape, maintaining our commitment to providing a high-quality, future-ready education.

Title IV, Part A Needs Assessment

According to the Every Student Succeeds Act (ESSA), all local educational agencies (LEAs) receiving at least $30,000 must conduct a needs assessment specific to Title IV, Part A (ESSA Section 4106[f]). Each LEA, or consortium of LEAs, shall conduct the needs assessment once every three year (ESSA Section 4106[d][3]).

Well-rounded Education Opportunities (ESSA Section 4107)

Identify any indicators, or measures/data points to examine needs for improvement of the Title IV, Part A priority content areas.

Sage Oak examined multiple indicators and data points to determine areas of need related to well-rounded educational opportunities. Measures included CAASPP performance data, iReady diagnostic and growth data, English Learner Progress Indicator (ELPI) data, graduation rates, College/Career Indicator (CCI) data, A-G completion rates, CTE pathway participation and completion data, Advanced Placement participation, dual enrollment participation, chronic absenteeism, stakeholder survey feedback, and participation data related to synchronous learning opportunities and intervention supports. The school also reviewed subgroup performance data, particularly for students with disabilities, English Learners, socioeconomically disadvantaged students, and students identified for intervention support through MTSS processes.

What activities will be included within the support for a well-rounded education?

Sage Oak will continue supporting a well-rounded education through expanded access to synchronous instruction opportunities, Oakschool courses, Virtual Learning Academy programs, the Program for Advanced and Gifted Education (PAGE), A-G aligned coursework, CTE pathways, college and career readiness programming, dual enrollment opportunities, intervention supports, and personalized learning pathways. PAGE provides advanced and gifted students with specialized enrichment opportunities, virtual and in-person learning experiences, guest speakers, field trips, and parent support resources designed to foster critical thinking, creativity, and academic growth. Additional activities include implementation of Power Standards to strengthen instructional consistency, AVID strategies to support college and career readiness and student ownership, targeted intervention and MTSS supports, enrichment opportunities, and expanded career exploration experiences. Professional development supporting effective instruction, student engagement, and personalized learning practices will also be included.

How will the activities be evaluated for the effectiveness of strategies and activities funded under Title IV, Part A. Include the indicators, or measures/data points used to determine future program planning?

Program effectiveness will be evaluated through analysis of student achievement and growth data, CAASPP results, iReady growth measures, ELPI and reclassification data, graduation rates, CCI data, A-G completion rates, CTE participation and completion data, dual enrollment participation, attendance and chronic absenteeism rates, intervention progress monitoring data, and stakeholder survey feedback from students, families, and staff. The school will also review participation in synchronous instruction, Oakschool programming, and intervention supports to determine effectiveness and guide future program planning and resource allocation.

Safe and Healthy Students (ESSA Section 4108)

Identify any indicators, or measures/data points to examine needs for improvement of the Title IV, Part A priority content areas.

Sage Oak reviewed multiple indicators related to student safety, engagement, and well-being, including chronic absenteeism rates, suspension and expulsion rates, stakeholder survey data, participation in counseling and social-emotional support services, MTSS referral and intervention data, student engagement data, school climate feedback collected through surveys and stakeholder engagement opportunities, and outcomes connected to the school's tiered re-engagement process designed to support students demonstrating disengagement or attendance concerns. The school also reviewed subgroup data to identify areas where additional support may be needed.

What activities will be included within the support for safety and health of students?

Activities supporting safe and healthy students include expanded social-emotional learning supports, counseling services, wellness and mental health resources, MTSS interventions, student engagement opportunities, staff training related to student wellness and intervention practices, family engagement activities, and programs that promote student connection and belonging. Sage Oak will also continue providing synchronous opportunities for student collaboration and relationship-building, as well as targeted supports for students identified through intervention or wellness processes.

How will the activities be evaluated for the effectiveness of strategies and activities funded under Title IV, Part A. Include the indicators, or measures/data points used to determine future program planning?

The effectiveness of activities will be evaluated through analysis of chronic absenteeism, suspension and expulsion rates, participation in counseling and support programs, MTSS progress monitoring, student and family survey feedback, engagement data, and school climate indicators. Stakeholder input and participation data will also be reviewed regularly to determine the effectiveness of supports and inform future program planning and resource allocation.

Effective Use of Technology (ESSA Section 4109)

Identify any indicators, or measures/data points to examine needs for improvement of the Title IV, Part A priority content areas.

Sage Oak reviewed indicators related to student and staff access to technology, participation in virtual and synchronous instruction, technology utilization data, stakeholder survey feedback, instructional technology implementation, staff professional development participation, and operational efficiency measures. The school also examined data related to digital learning access, instructional engagement, and implementation of technology tools supporting personalized learning and communication.

What activities will be included within the support of effective use of technology? Note: No more than 15 percent on technology infrastructure (ESSA Section 4109[b])

Activities include continued support for virtual and synchronous learning programs, instructional technology integration, AI-supported personalization tools, technology-based intervention supports, digital citizenship instruction, professional development for staff related to instructional technology and AI tools, communication systems supporting family engagement, and tools that support data-informed decision making and instructional efficiency. Sage Oak also conducted an AI SWOT analysis and developed a report outlining strengths, weaknesses, opportunities, and threats related to the school’s current and future use of artificial intelligence. This process helped the school better understand its current landscape, identify areas for growth and caution, and take a more strategic and informed approach to long-term AI implementation. Consistent with ESSA requirements, funds will primarily support effective use of technology for teaching, learning, communication, and student engagement rather than technology infrastructure purchases.

How will the activities be evaluated for the effectiveness of strategies and activities funded under Title IV, Part A. Include the indicators, or measures/data points used to determine future program planning?

Program effectiveness will be evaluated through stakeholder survey feedback, participation data related to synchronous instruction and digital learning opportunities, staff professional development participation, technology usage data, student engagement indicators, and student achievement and growth data connected to instructional technology implementation and personalized learning supports. The school will also review indicators related to communication systems, instructional efficiency, and access to digital learning tools to determine effectiveness, identify areas for improvement, and guide future planning related to instructional technology, digital literacy, and personalized learning opportunities.

- Note: All planned activities must meet the authorized use of funds criteria located on the Title IV, Part A Authorized Use of Funds web page at https://www.cde.ca.gov/sp/st/tivpaauthuseoffunds.asp.

Date of LEA's last conducted needs assessment:

Title IV, Part A Program
Rural Education and Student Support Office
California Department of Education
Email: TitleIV@cde.ca.gov Web site: https://www.cde.ca.gov/sp/st/

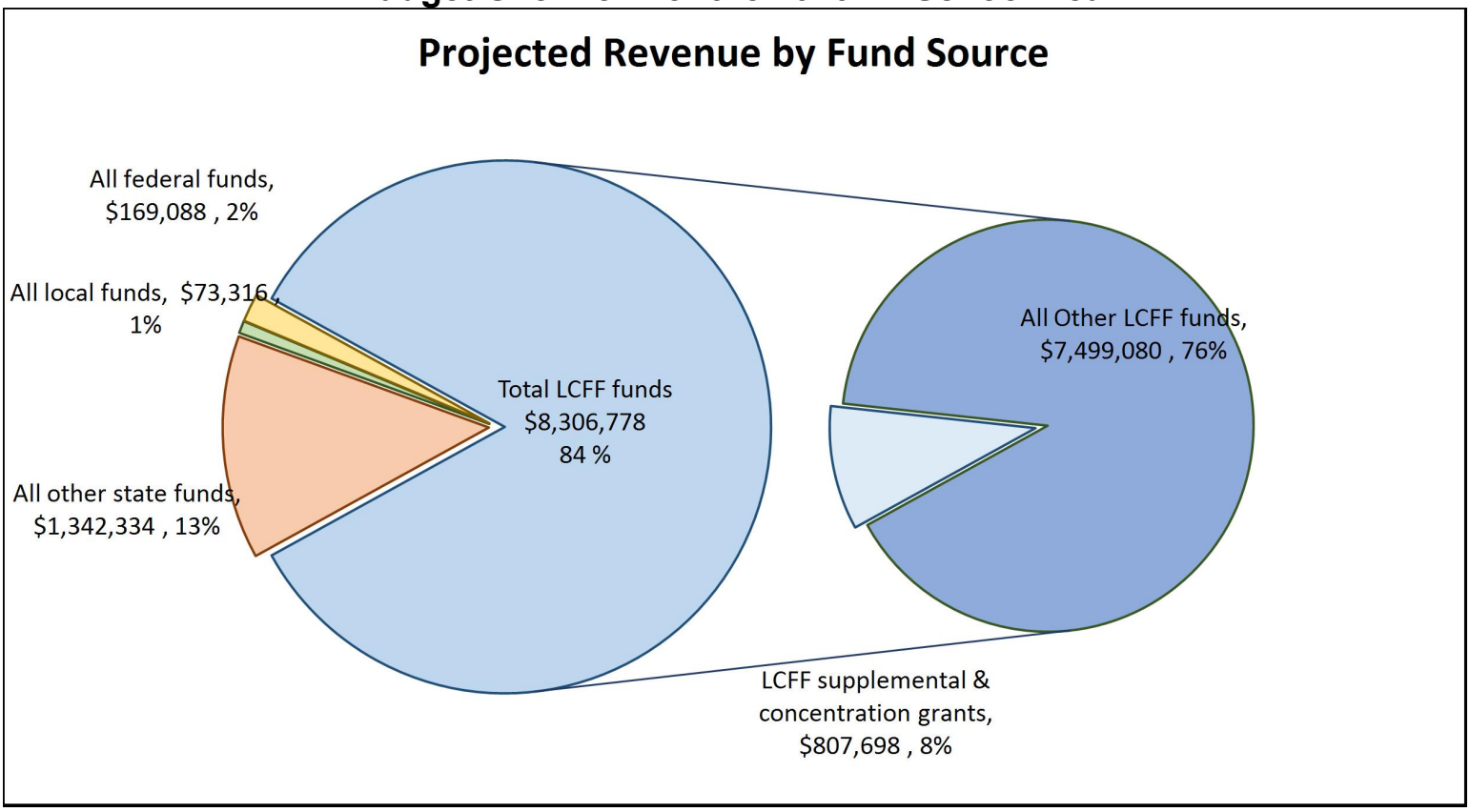
California Department of Education
February 2022

LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Sage Oak Charter School- Keppel
CDS Code: 19-64642-0136127
School Year: 2026-27
LEA contact information:
Krista Woodgrift
Superintendent
kwoodgrift@sageoak.education
888-435-4445

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

Budget Overview for the 2026-27 School Year

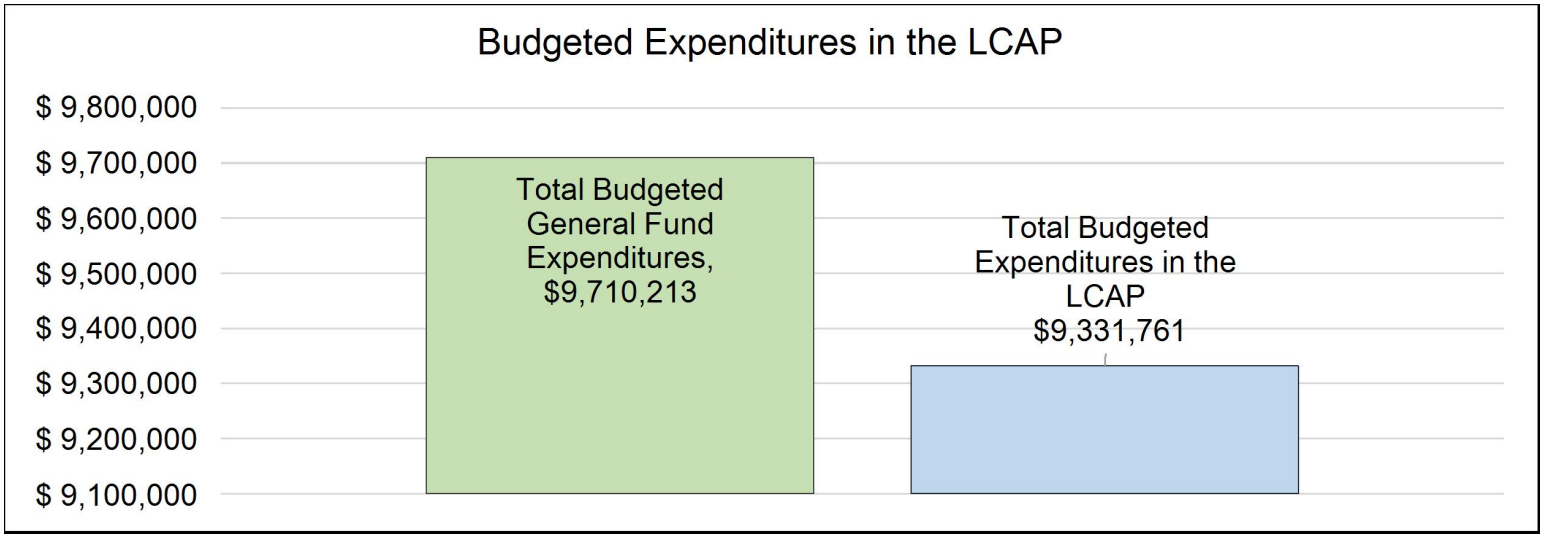


This chart shows the total general purpose revenue Sage Oak Charter School- Keppel expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Sage Oak Charter School-Keppel is $9,891,516, of which $8,306,778 is Local Control Funding Formula (LCFF), $1,342,334 is other state funds, $73,316 is local funds, and $169,088 is federal funds. Of the $8,306,778 in LCFF Funds, $807,698 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Sage Oak Charter School- Keppel plans to spend for 2026-27. It shows how much of the total is tied to planned actions and services in the LCAP.

The text description of the above chart is as follows: Sage Oak Charter School- Keppel plans to spend $9,710,213 for the 2026-27 school year. Of that amount, $9,331,761 is tied to actions/services in the LCAP and $378,452 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

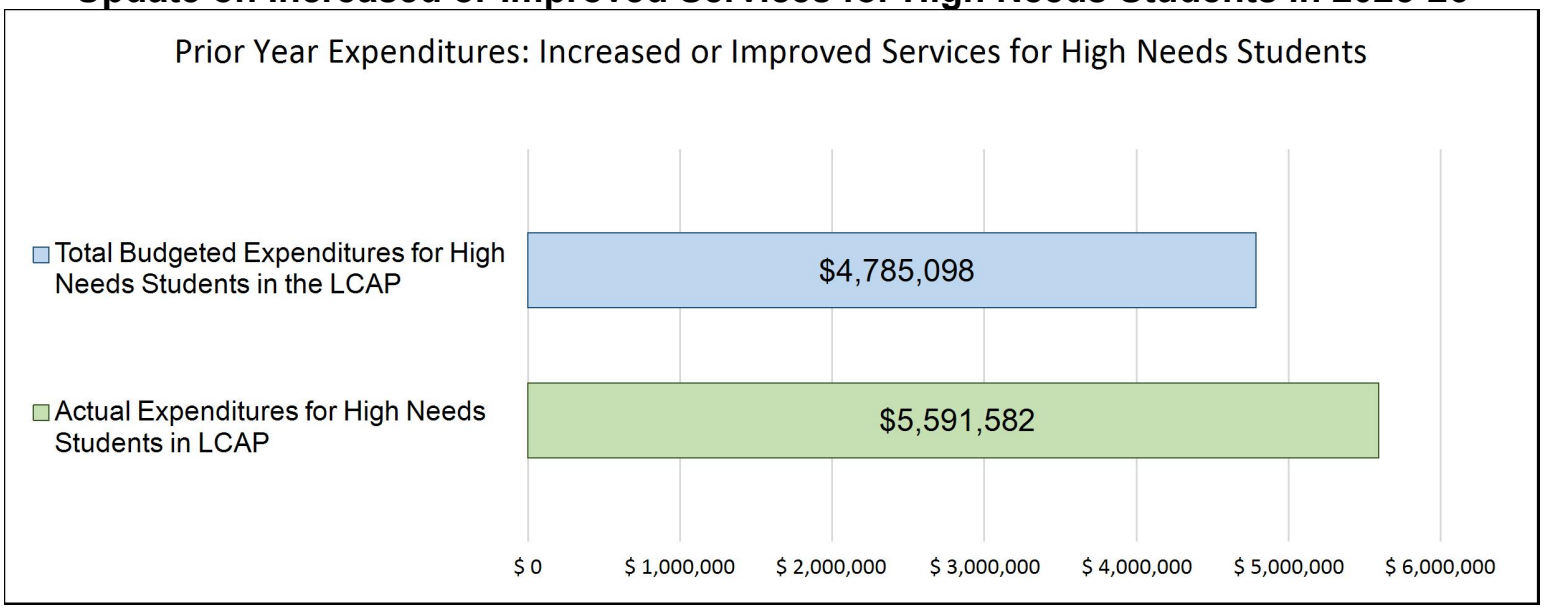
Certain expenditures such as charter oversight fees, human resources administration, legal and compliance services, insurance, rent, and utilities, are necessary operational costs incurred to maintain Sage Oak's educational program and organization infrastructure.

Increased or Improved Services for High Needs Students in the LCAP for the 2026-27 School Year

In 2026-27, Sage Oak Charter School- Keppel is projecting it will receive $807,698 based on the enrollment of foster youth, English learner, and low-income students. Sage Oak Charter School- Keppel must describe how it intends to increase or improve services for high needs students in the LCAP. Sage Oak Charter School- Keppel plans to spend $7,056,161 towards meeting this requirement, as described in the LCAP.

LCFF Budget Overview for Parents

Update on Increased or Improved Services for High Needs Students in 2025-26



This chart compares what Sage Oak Charter School- Keppel budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Sage Oak Charter School- Keppel estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2025-26, Sage Oak Charter School- Keppel's LCAP budgeted $4,785,098 for planned actions to increase or improve services for high needs students. Sage Oak Charter School- Keppel actually spent $5,591,582 for actions to increase or improve services for high needs students in 2025-26.

Local Control and Accountability Plan

The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Sage Oak Charter School- Keppel	Krista Woodgrift Superintendent	888-435-4445 888-435-4445

Plan Summary [2026-27]

General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA. LEAs may also provide information about their strategic plan, vision, etc.

Sage Oak Charter School - Keppel (Sage Oak) educates students through a personalized and collaborative learning approach, offering students from transitional kindergarten through 12th grade an empowering education designed to prepare them for purposeful and productive lives. At Sage Oak, we cherish the individuality of each student, inspiring them to leverage their unique potential and contribute positively to their communities. Our commitment to our students is encapsulated in our core values: Service, Accountability, Growth Mindset, and Excellence, which guide our educational approach and community interactions.

Operating across a diverse geographical region that includes Los Angeles, Ventura, Kern, San Bernardino, and Orange. Sage Oak offers a unique balance of flexibility, accountability, and academic excellence. Our educational model emphasizes the importance of partnership between educators and families, ensuring that each student's personal academic goals are achieved through a tailored educational experience.

Sage Oak is dedicated to harnessing the power of flexible learning environments and advanced educational technologies to cater to a wide range of learners. Our approach is characterized by personalized learning pathways that accommodate students' diverse backgrounds and aspirations, providing them with a stimulating and supportive alternative to traditional education models. Through the integration of a varied curriculum, individualized support, and high academic standards, Sage Oak fosters an environment where students are encouraged to become self-motivated, competent, lifelong learners poised to make a meaningful impact in their communities. Sage Oak's student input is comprehensive, spanning academics, well-being, testing, and targeted populations. This data set is a cornerstone for school improvement.

Our educational philosophy prioritizes the development of open, curious, and alert minds, preparing students to thrive in any learning situation. By offering the flexibility to learn anytime and anywhere, combined with adaptable teaching and curricular models, Sage Oak empowers students to take ownership of their education. This approach equips them with not only the necessary knowledge and skills but also the confidence, creativity, and resourcefulness to navigate the challenges and opportunities of the 21st century.

As of the most recent data reporting period, Sage Oak serves a vibrant and diverse student body, with enrollment reflecting a broad spectrum of cultural and socio-economic backgrounds. Our commitment to inclusivity and excellence is evident in our dedicated staff, innovative programs, and the supportive community that makes Sage Oak a leader in personalized education.

Based on the Fall 1 Census data reporting on October 1, 2025, to be reported on the California Dashboard, there were 558 students enrolled. Other student groups are as follows: 56.81% are classified as Socioeconomically Disadvantaged (SED). Students with Disabilities (SWD) make up 9.68% of the population, and English Learners (EL) make up 2.15%. The ethnic diversity of Sage Oak includes students who are White (39.4%), Hispanic (44.9%), Two or More Races (5.5%), Asian (4.6%), African American (2.7%), Filipino (2.1%), and American Indian/Alaskan Native (.2%).

Reflections: Annual Performance

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

Reflecting on Sage Oak's annual performance through the California School Dashboard and local data reveals both significant strengths and areas for continued growth. Sage Oak performs above the state in all Dashboard indicators, demonstrating the strength of its academic program and student support systems. Our achievements are underscored by a 100% graduation rate, strong college and career readiness outcomes, and very low rates of chronic absenteeism, suspension, and expulsion. These results reflect a safe, supportive, and engaging school environment for students.

In addition, Sage Oak's performance in English Language Arts is notably strong, with an overall Distance from Standard that places the school in the high category and reflects the effectiveness of its ELA program. Another notable strength is the performance of the Socioeconomically Disadvantaged (SED) student group in mathematics, which is 48.8 points higher than the state and highlights an important area of academic success. At the same time, challenges remain in academic performance for Students with Disabilities (SWD), particularly in mathematics, which continues to be an important focus area. While there is not sufficient data to report performance for English Learners (EL), Homeless, and Foster Youth student groups due to small population sizes, the school remains committed to strengthening the overall academic foundation and addressing identified areas of need to ensure equitable outcomes for all students.

California School Dashboard Analysis

ELA Distance from Standard (DFS):

- Overall : +12.8

- EL: n/a- not enough students
- SWD: -87.2
- SED: -8.6

Math DFS:
- Overall: -1.6
- EL: n/a- not enough students
- SWD: -89.3
- SED: -24.1

Chronic Absenteeism: 1.8%
Grad Rate:100%
Suspension: 0%
Expulsion: 0%
College and Career Readiness: 50%
EL Progress (ELPI): n/a- not enough students

iReady Local Assessment Analysis

ELA (on or above grade level):
- Overall : 71%
- EL: 36% (11 students)
- SWD: 40%
- SED: 66%
- Homeless:86% (7 students)
- Foster:n/a

Math (on or above grade level):
- Overall: 63%
- EL: 36% (11 students)
- SWD: 42%
- SED: 59%
- Homeless: 57% (7 students)
- Foster: n/a

In response to these outcomes, Sage Oak continues to align its improvement efforts to its LCAP goals. Strategic actions include targeted interventions, expanded professional development opportunities, integration of advanced technologies, and personalized learning pathways to better meet individual student needs. The school also remains committed to enhancing college and career readiness pathways so students are well prepared for future academic and career opportunities. This comprehensive approach is intended to improve educational outcomes for all students, with a particular focus on those who need additional academic and social-emotional support.

Learning Recovery Emergency Block Grant (LREBG) and Title I, Part A

Sage Oak utilized unexpended Learning Recovery Emergency Block Grant (LREBG) funds for the 2025–26 school year. Additionally, LREBG and Title I, Part A funded actions can be found in Goal 1, Action 2 and Goal 2, Action 4. A review of state and local data, along with stakeholder engagement feedback, indicates an ongoing need to strengthen Multi-Tiered System of Supports (MTSS) and counseling services for qualifying students. These efforts are intended to maintain small teacher-to-student ratios and address the engagement and academic needs of all student groups.

During this school year, Sage Oak has used these funds to support the hiring of reading specialists and an intervention teacher. The school has strategically invested LREBG and Title I, Part A funding to expand staff capacity and strengthen intervention programs and resources for students, particularly in English Language Arts and Mathematics through small-group instruction. These actions align with allowable uses of funds in the areas of staff hiring and professional support and are designed to improve access, intervention, and academic outcomes for students in need of additional support. See action descriptions for additional details.

Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

n/a

Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

n/a

Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

n/a

Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

n/a

Engaging Educational Partners

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Educational Partner(s)	Process for Engagement
Parent Advisory Committee	The Parent Advisory Committee (PAC) played a pivotal role in shaping the Local Control and Accountability Plan (LCAP) by participating in key meetings on October 2, 2025; December 4, 2025; January 15, 2026; and May 7, 2026. These meetings fostered open dialogue and provided valuable opportunities for parents to learn, share insights, and offer thoughtful feedback. Throughout the year, parents engaged in discussions and contributed input on a range of key initiatives, including the launch of Power Standards, Sage Oak's Safety Plan, the English Learner Program, the counseling program, and the Program for Advanced and Gifted Education (PAGE). They also provided feedback on technology support efforts, including the introduction of new Chromebooks and the Self-Help IT Portal. In addition, parents reviewed and provided input on the LCAP mid-year and end-of-year reports, as well as the local indicators presentation, helping ensure the plan reflects the needs and priorities of the school community.
Student Advisory Committee	The Student Advisory Committee (STAC) played a meaningful and collaborative role in supporting the development of the LCAP through active participation in meetings on October 2, 2025; December 4, 2025; January 15, 2026; and May 7, 2026. These meetings fostered open dialogue and provided valuable opportunities for students to learn, share insights, and offer thoughtful feedback. Throughout the year, students contributed input on a range of key initiatives, including the launch of Power Standards, the introduction of new Chromebooks and the Self-Help IT Portal, the counseling program, the Program for

Educational Partner(s)	Process for Engagement
	Advanced and Gifted Education (PAGE), and key LCAP topics such as student supports, school safety, technology access, and college and career readiness. Students also participated in a Chromebook trial to help ensure that devices are appropriate across grade levels and support a variety of learning needs and uses. In addition, students provided feedback on the LCAP mid-year and end-of-year reports, as well as the local indicators presentation, helping ensure the plan reflects the needs and priorities of the school community.
Parents, Students, Teachers, Staff	In the development of the LCAP, a comprehensive approach was employed to engage parents, staff, and students, ensuring their voices were integral to the plan. This inclusive process utilized various survey platforms, such as Parsec Reals survey platform, to gather in-depth feedback including an AI-led interview regarding parent input. "Question of the Month" surveys were instrumental in capturing ongoing input, while educational partner surveys provided broader insights into the needs and perspectives of the school community. Additionally, climate surveys were conducted to understand the overall environment and satisfaction levels within the educational setting. This multifaceted engagement strategy ensured a diverse range of feedback, which was crucial in shaping a well-rounded and effective LCAP.
Principals, Leadership, Administrators	Principals, the leadership team, and administrators played an essential role in shaping the LCAP by engaging in strategic planning and collaborative review throughout the year. Through regular "Question of the Month" surveys, leadership gathered valuable staff feedback that provided important insights for informed decision-making and continuous improvement. In addition, during key meetings held on May 8, 2025; September 3, 2025; October 1, 2025; October 30, 2025; November 12, 2025; January 14, 2026; February 4, 2026; and April 15, 2026, the leadership team participated in both half-day and full-day sessions focused on examining the school's specific needs, analyzing student achievement data, reviewing feedback from educational partners, and developing and monitoring the annual strategic plan as it relates to the LCAP. These sessions were critical to aligning the LCAP with the school's broader goals and ensuring the plan remained responsive, strategic,

Educational Partner(s)	Process for Engagement
	and grounded in data. Leadership also used these opportunities to review progress toward LCFF priorities and assess how schoolwide initiatives and resource decisions support student outcomes. This collaborative and methodical approach helped ensure a well-structured LCAP that reflects the diverse needs of the student body and supports continuous improvement across the organization.
Title 1 Parents/Guardians	In the development of the LCAP, Sage Oak Charter Schools prioritized meaningful engagement with Title I parents and guardians through a range of outreach and participation opportunities grounded in its Parent and Family Engagement Policy. One key activity was the annual Title I Parent/Guardian Information Meeting, held virtually during the Parent Summit on August 11, 2025, to maximize accessibility for families. Parents were also invited to participate in quarterly ELAC meetings, English Language Proficiency Assessments for California (ELPAC) information sessions in November, and intervention class information sessions in September. These meetings created opportunities for two-way communication, allowing families to learn more about Title I services, ask questions, and provide input on school programs and student needs. Sage Oak also offered a flexible range of engagement opportunities, including recorded sessions, parent and guardian webinars, and a school-parent compact process that invited family feedback. Together, these efforts helped foster an inclusive and supportive school culture. Through ongoing communication, such as personalized emails, the weekly Sage News, and targeted outreach to families of Title I students, Sage Oak worked to ensure that parents remained informed and meaningfully involved in their child's education. These strategies reflect Sage Oak's continued commitment to strong family-school partnerships and to ensuring that parent voice helps inform educational priorities, support academic success, and strengthen outcomes for students.
Community Partners	In the development of the LCAP, the school's partnership with Parsec Education marked a significant enhancement in strategic planning and program evaluation. Parsec Education's expertise was particularly instrumental in developing 'Street Data Metrics,' a set of

Educational Partner(s)	Process for Engagement
	advanced, nuanced measures designed to provide a deeper understanding of educational impact and student outcomes. This collaboration represents a commitment to incorporating expert external insights and data-driven methodologies into the LCAP. The involvement of Parsec Education not only introduced innovative perspectives to the planning process but also ensured that the evaluation of programs was thorough and reflective of real-world educational scenarios. This partnership, especially in the development of these tailored 'Street Data Metrics,' underscores the school's dedication to employing comprehensive, expert-driven strategies to achieve its educational goals and enhance the overall learning experience.

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

The adopted LCAP for Sage Oak Charter School was meaningfully shaped by feedback gathered throughout the year from parents, students, staff, leadership, Title I families, advisory committees, and community partners. Input from the PAC, ELAC, STAC, and the newly added Sage Connections committee helped confirm the importance of maintaining strong systems for communication, student support, and school connectedness. Educational partners consistently emphasized the value of meaningful opportunities for involvement, high-quality counseling and social-emotional supports, safe and respectful learning environments, improved onboarding for new students, strong technology access and support, and continued attention to college and career readiness. Parent and student feedback also informed decisions related to Power Standards, the English Learner Program, the counseling program, PAGE, new Chromebooks, the Self-Help IT Portal, and other efforts designed to improve access, responsiveness, and the overall student experience. Mid-year reporting also reflected that Sage Oak's engagement work included PAC, STAC, ELAC, and Sage Connections, as well as targeted events and expanded opportunities for connection across the school community.

The LCAP was also influenced by broader survey and planning data collected through Parsec Reals, Question of the Month surveys, climate surveys, staff feedback tools, and strategic planning sessions with principals, leadership, and administrators. These data sources helped the school identify both strengths and areas for refinement, including the continued need to strengthen multilingual learner access, improve math support through engaging formats and tutoring, expand live and synchronous instructional quality, and build out college and career readiness experiences and community connection opportunities. Feedback from staff and leadership also supported continued investment in professional development, operational efficiency, technology integration, and systems that improve service delivery while preserving Sage Oak's relationship-based model. In addition, educational partner feedback reinforced the value of events, engagement opportunities, and experiential learning experiences that help students build connection, explore interests, and access college and career pathways. Together, this feedback ensured that the adopted LCAP remained responsive, data-informed, and aligned to the priorities most clearly expressed by the school community.

Ultimately, Sage Oak's LCAP reflects a collaborative, transparent, and evolving strategy designed to meet the diverse needs of its learners. Through intentional and recurring engagement with families and staff, Sage Oak continues to position itself as a leader in personalized, inclusive education—preparing all students, especially those with the greatest needs, to thrive academically and personally.

Goals and Actions

Goal

Goal #	Description	Type of Goal
1	Student Outcomes: Academic Achievement and College and Career Readiness 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.	Broad Goal

State Priorities addressed by this goal.

Priority 1: Basic (Conditions of Learning)
Priority 2: State Standards (Conditions of Learning)
Priority 3: Parental Involvement (Engagement)
Priority 4: Pupil Achievement (Pupil Outcomes)
Priority 5: Pupil Engagement (Engagement)
Priority 6: School Climate (Engagement)
Priority 7: Course Access (Conditions of Learning)
Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

At the heart of this goal lies a commitment to holistic education. Through its standout programs, Sage Oak not only offers an excellent academic foundation but also fosters a love for learning and a commitment to serving the community. These programs are designed to be immersive, innovative, and integrated, ensuring that every student gets a chance to shine and find their passion. Whether it's through advanced academic curricula, extracurricular activities, or real-world application projects, the objective is clear: to produce graduates who are not only academically adept but also critical thinkers, problem solvers, and community leaders.

At Sage Oak, our commitment to data informed practices drives our focus on tangible academic achievements and readiness. Currently, 36% of our high school students have completed A-G requirements. With that and only a small number of students completing CTE pathways, our strategies include enhancing college and career readiness support through high school counselors and the development of additional CTE pathways. Sage Oak also specifically tailors its educational approach to support socio-economically disadvantaged students, English learners, foster youth, and students with disabilities. For our socio-economically disadvantaged students and students with disabilities, CAASPP scores and iReady growth show a need for improvement. In addition, since 49% of students with disabilities are 2 or more grade levels below in iReady Math, dropping from our baseline percentage, our efforts are geared towards ensuring all students reach their fullest

potential. With the further development of our AVID program and increasing participation in synchronous instruction, professional development opportunities and a specific focus on supporting our LTELS and students qualifying for intervention, we aim to lift these scores.

By embedding education within immersive, innovative, and integrated programs, and utilizing Learning Recovery Emergency Block Grant (LREBG) and Title 1-A funds with increased staffing, this goal directly supports all students, enhancing their academic proficiency, critical thinking, college and career readiness, and leadership skills. This inclusive strategy demonstrates Sage Oak's commitment to equitable, high-quality educational opportunities, ensuring all students have the resources and support needed to succeed.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.1	Completion of A-G Requirements: % of students successfully completing the A-G requirements	54.5% Source: Dataquest 22-23	69.2%	35.7%	59.%	-18.8%
1.2	Career Technical Education (CTE) Pathway Completion # of students completing CTE pathways	1 student Source: Dataquest 22-23	0 students	0 students	7 students	-1
1.3	Percentage of Students Achieving a Score of 3 or Higher on AP Exams	n/a- too few students Source: College Board 22-23	0	N/A	70%	0
1.4	College and Career Indicator (CCI) Performance % of students considered college and	54.5% Source: CA Dashboard 22-23	76.9%	50%	60%	-4.5%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	career prepared according to the CA Dashboard					
1.5	Graduation Rate Maintenance % of graduated students on the CA Dashboard	100% Source: CA Dashboard 22-23	92.3%	100%	90%	0
1.6	Maintenance of Low Middle School Dropout Rates # of middle school dropouts	.98% Source: Internal 22-23	.94%	0%	0	-.98%
1.7	Maintenance of Low High School Dropout Rates % of high school dropouts according to DataQuest cohorts	0% Source: CA Dataquest 22-23	0%	0%	2% or less	0
1.8	Expansion of K-8 Live Synchronous Instruction Courses Aligned with CTE Pathways # of K-8 synchronous course offerings that align with the CTE pathways	79 course offerings Source: Internal 22-23	198 course offerings	280 course offerings	200 course offerings	201

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.9	Performance in iReady Assessments for ELA and Math % of students achieving at or above grade level in iReady assessments for English Language Arts (ELA) and Mathematics	Math- 58% ELA- 68% Source: i-Ready 23-24 Spring	Math- 59% ELA- 69%	Math - 63% ELA - 71%	Math- 61% ELA- 71%	Math 5% ELA 3%
1.10	California Assessment of Student Performance and Progress (CAASPP) Achievement: % of students who have met or exceeded standards in CAASPP assessments for English Language Arts (ELA) and Mathematics	Math- 48.33% ELA- 65.07% Source: Dataquest 22-23	Math 44.39% ELA 56.63%	Math 50.86% ELA 56.9%	Math- 51% ELA- 68%	Math 2.53% ELA -8.17%
1.11	CAASPP Performance for Socio-Economically Disadvantaged (SED) Students % of socio-economically disadvantaged students meeting or exceeding CAASPP standards in English Language Arts (ELA) and Mathematics	Math- 34.88% ELA- 52% Source: Dataquest 22-23	Math 29.54% ELA 42.05%	Math 41.29% ELA 47.71%	Math- 37% ELA- 55%	Math 2.12% ELA -4.29%
1.12	Accessibility to Instructional Materials	100%	100%	100%	100%	0

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	% of students with full access to necessary instructional materials	Source: SARC 23-24				
1.13	Alignment with State Standards % of students whose education is fully aligned with state standards	100% Source: SARC 23-24	100%	100%	100%	0
1.14	Community Belief in Robust Curriculum % of parents, students, and staff who believe that students have access to a challenging and comprehensive curriculum supported by resources that enable them to meet and exceed grade-level standards in core content areas.	Parents- 98% Students- 97% Staff- 99% Source: Internal 23-24	Parents 98% Students 96% Staff 94%	Parents 98% Students 96% Staff 97%	Parents- 90% or higher Students- 90% or higher Staff- 90% or higher	Parents 0 Students -1% Staff -2%
1.15	Growth in ELA and Math Among Intervention Students % of students receiving interventions who demonstrate growth equivalent to one year or more in English	Math- 51% ELA- 57% Source: Internal 22-23	Math 47% ELA 35%	Math 55% ELA 56%	Math- 43% ELA- 51%	Math 5% ELA -1%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	Language Arts (ELA) and Mathematics					
1.16	Increased Participation Rate in Math Interventions for Students with Disabilities (SWD) # of SWD participating in math intervention programs	60% Source: Internal 23-24	61%	62.7%	60%	2.7%
1.17	Increased iReady Math Achievement for Students with Disabilities (SWD) Decrease % of SWD moving out of Tier 3 in iReady math assessments	36% Source: i-Ready 22-23	51%	49%	33%	13%
1.18	Improved CAASPP Performance for SWD in Math Achievement Increase in DFS in Math for SWD 3 points annually	-77.5 DFS Source: CA Dashboard 22-23	-102.7 DFS	-89.3 DFS	-68 DFS	-11.8
1.19	Increased Teacher Preparedness for Student Articulation	78% Source: Internal 23-24	98%	97%	90% or higher	19%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	% of teachers who feel equipped to effectively prepare and transition their students to the next grade level band					

Goal Analysis [2025-26]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Academic Achievement: Advancing Student Outcomes Through Pathways, Targeted Support, and Instructional Alignment

During the 2025–26 school year, Sage Oak continued implementation of Goal 1 with a focus on improving academic achievement, college and career readiness, personalized intervention, math support for students with disabilities, and articulation across grade spans. Implementation remained aligned with the planned actions and reflected the school's continued commitment to preparing students for success through comprehensive K–12 pathways, data-informed supports, and responsive instructional practices. Core efforts included integrating career, community, and life skills into student pathways, refining a personalized multi-tiered system of support, expanding math intervention for students with disabilities, and strengthening articulation across grade bands.

A major success in implementation was the school's continued effort to carry out all five planned actions in a coordinated way. College and career readiness work included increased focus on decisions after high school graduation, expanded college and career week experiences, career spotlight opportunities, financial literacy learning, and pathways-based course offerings. Live synchronous instruction directly aligned to CTE pathways continued to expand significantly, helping students connect their interests and future goals to available coursework. Sage Oak also continued to strengthen its academic systems through the use of Power Standards, Quick Checks, evaluation of core curriculum, and the Professional Development Passport, all of which supported stronger alignment, more consistent instructional expectations, and improved teacher capacity. Sage Oak's recognition on the ERP (Educational Results Partnership) Honor Roll also highlights the strength of the school's academic program and reinforces that the systems and supports implemented under Goal 1 are contributing to a culture of high expectations, strong achievement, and college and career readiness. I-Ready local assessment results also showed meaningful academic progress, with Math increasing from a 58% baseline to 63% in Year 2 and Reading increasing from a 68% baseline to 71% in Year 2, indicating that Sage Oak is making steady progress toward its three-year goal of increasing performance by 3 percentage points from baseline. Intervention and support systems also expanded through additional staffing, including added math support in grades 3–5 and high-dose tutoring for high school algebra students. These combined efforts helped reinforce a schoolwide focus on academic growth, access, and readiness.

Implementation also revealed areas for continued refinement. Although some college and career readiness outcomes remained strong, A–G completion and CCI both declined in Year 2, and CTE pathway completion remained at zero, well below the long-term target. Staffing changes also affected pathway participation in Art, Media, and Entertainment. In Action 3, participation in math interventions for students with disabilities increased and some measures remained above target, but achievement results continued to fluctuate across metrics.

Overall, Goal 1 was implemented successfully, with strong evidence of progress in intervention systems, articulation, access to curriculum and standards, and math support participation, alongside clear direction for continued improvement in pathways completion and college and career readiness outcomes. These results suggest that Sage Oak's challenge is less about access to supports and more about converting strong access and participation into stronger A–G, CCI, and CTE completion outcomes over time.

Ongoing community input, use of real-time data, and strategic design will ensure implementation evolves to meet the needs of all learners—preparing every student for college, career, and life success.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The school spent materially more on action 1.1 related to increased expenditures supporting college and career readiness activities. The school also spent more for action 1.3 related to supporting students with disabilities.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Overall Assessment: Effective with Areas of Strong Performance and Continued Refinement

The actions under Goal 1 have been effective in making progress toward the goal of improving academic achievement, college and career readiness, intervention systems, math support for students with disabilities, and articulation across grade spans. Year 2 results show strong performance in graduation rate, high school dropout, expansion of live CTE-aligned course access, access to instructional materials and standards, intervention growth, and teacher articulation confidence. At the same time, some key college and career readiness indicators, especially A–G completion, CTE pathway completion, AP outcomes, and CCI, remain areas for continued refinement.

K–12 Pathways, College and Career Readiness, and Postsecondary Preparation – Mixed Results with Continued Need for Refinement

This action showed mixed results in Year 2. Graduation rates remained highly effective at 100%, exceeding the 90% target, and high school dropout remained at 0%, meeting the goal to maintain 2% or less. Middle school dropout also improved to 0%, meeting the target. In addition, live synchronous instruction directly aligned with CTE pathways expanded from a baseline of 79 offerings to 280, exceeding the Year 3 target of 200 class offerings. These results show that Sage Oak has been highly effective in maintaining strong completion outcomes and expanding access to career-aligned coursework.

At the same time, several college and career readiness metrics declined or remained below target. A–G completion dropped from 69.2% in Year 1 to 35.71% in Year 2, falling below both the baseline of 54.5% and the Year 3 target of 59.5%. CCI also declined to 50% in Year 2, below both baseline and the target of 60%. CTE pathway completion remained at 0, below the target of 7 students. These results suggest

that while access to pathways and coursework remains strong, student completion of key postsecondary readiness outcomes will require continued attention, especially given the impact of staffing changes and transfer patterns.

Personalized, Data-Informed Multi-Tiered System of Support – Effective to Highly Effective

This action has been effective to highly effective in strengthening access to challenging curriculum, intervention supports, and academic growth systems. Access to instructional materials and state standards remained at 100%, and perception data remained strong, with parents, students, and staff continuing to report that students have access to a robust and challenging curriculum supported by resources across core content areas. Intervention results also showed meaningful progress. The percentage of intervention students growing one year or more in ELA was strong at 56% in Year 2, growing from 35% in Year 1, and meeting the Year 3 target. In Math, intervention growth increased from a baseline of 51% to 55% in Year 2, showing clear progress toward the target of 56%. These results indicate that Sage Oak's intervention model is contributing positively to student growth.

State assessment proficiency data also reflected several strengths. CAASPP Math performance improved from 48.33% at baseline to 50.86% in Year 2, exceeding the target of 50%. Socioeconomically disadvantaged students also improved in Math from 34.88% at baseline to 41.29% in Year 2, exceeding the goal to maintain or improve. While CAASPP ELA improved slightly from Year 1 to Year 2 at 56.9%, it remains below the baseline of 65.07%. Socioeconomically disadvantaged students in ELA also improved from Year 1 to Year 2 at 47.71%, though they remain below the baseline of 52%. I-Ready local assessment results provide additional evidence of progress under this action. In Reading, the percentage of students performing at or above grade level increased from a baseline of 68% to 71% in Year 2, meeting the school's three-year goal. In Math, the percentage of students performing at or above grade level increased from a baseline of 58% to 63% in Year 2, exceeding the three-year goal of 61%. These local assessment results reinforce that Sage Oak's multi-tiered system of support is contributing to improved academic performance and strong growth from baseline to Year 2.

The California growth model provides important additional context for these outcomes. In ELA, overall growth was 64.7% and rated Average, with English learners showing especially strong growth at 90.9%, also rated Average within the model. In Math, overall growth was 75.8% and rated Accelerated, which is a notable area of strength. Several student groups also demonstrated Accelerated growth in Math, including English learners at 90.9%, socioeconomically disadvantaged students at 76%, Asian students at 81.8%, Hispanic students at 76.8%, and White students at 76.8%. Students with disabilities showed average growth in Math at 61.9%, while in ELA students with disabilities and students with two or more races were rated Moderate, indicating areas for continued support.

Overall, this action is effective to highly effective, with strong evidence that Power Standards, ongoing core curriculum evaluation, expanded intervention staffing, and high-dose tutoring are contributing to greater instructional consistency and academic growth. In addition, project-based learning was established and implemented this year for PAGE students, further enriching learning experiences through deeper engagement, critical thinking, and application of skills. The California growth model adds important context to these results, showing especially strong momentum in Math across multiple student groups and overall accelerated growth in Math schoolwide. At the same time, the data also make clear that ELA recovery for some groups and continued support for students with disabilities remain important priorities in the final year of the cycle.

Math Proficiency for Students with Disabilities – Effective with Mixed Achievement Results

This action has been effective in increasing access to math interventions for students with disabilities, though achievement outcomes remain mixed. Participation in math interventions increased from 60% at baseline to 62.7% in Year 2, exceeding the target of 60%. i-Ready math achievement for students with disabilities in Tier 3 remained above target, with 49% in Year 2 compared with a target of 33%, though it declined slightly from 51% in Year 1. CAASPP distance from standard in math for students with disabilities improved from -102.7 in Year 1 to -89.3 in Year 2, but remained below the baseline of -77.5, indicating partial recovery rather than full progress. These results suggest that the action is effective in maintaining strong access and some positive recovery, while continued refinement is needed to support more consistent and sustained math achievement growth for students with disabilities.

Articulation Across Grade Bands – Highly Effective

This action has been highly effective. Teacher confidence in articulating expectations and preparing students for the next grade span increased from a baseline of 78% to 97% in Year 2, exceeding the target of 90%. Notes from implementation indicate that examining data in PLCs and increasing cross-grade-level and grade-band collaboration contributed to this growth. These results suggest that Sage Oak has made strong progress in developing a more unified and data-informed articulation process that supports smoother transitions across grade levels.

Conclusion

Overall, the actions under Goal 1 have been effective in making progress toward the goal. The strongest areas of impact include graduation rate, dropout rate, expansion of live CTE-aligned coursework, access to curriculum and standards, intervention growth, math improvement for socioeconomically disadvantaged students, and articulation across grade bands. The main areas requiring continued refinement are A–G completion, CCI, CTE pathway completion, ELA proficiency recovery, and more consistent math achievement growth for students with disabilities. Taken together, these results show that Goal 1 actions are supporting important areas of student success while also highlighting specific college and career readiness outcomes that will require focused attention in the final year of the cycle.

Continued use of formative data, targeted professional development, and engagement with educational partners are essential to improving outcomes across all student groups in the remaining years of this LCAP cycle.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Based on reflection on prior practice, no major changes were made to the overall structure of Goal 1. The goal, metrics, target outcomes, and actions remain relevant and aligned with Sage Oak's identified needs related to academic achievement, college and career readiness, intervention, math support for students with disabilities, and articulation. However, Year 2 results indicate the importance of continuing to strengthen pathways completion, A–G completion, CCI outcomes, ELA recovery, and sustained math achievement growth for students with disabilities.

For the coming year, Sage Oak will continue refining implementation by building on initiatives that have supported progress to date, including Power Standards, evaluation of core curriculum, the Professional Development Passport, expanded intervention staffing, and stronger articulation practices. Additionally, Sage Oak will continue refining implementation by expanding internal CTE capstone and internship opportunities, pursuing stronger AP access, increasing professional development for math and English learner instruction, and intensifying tiered supports for all students. The school will continue emphasizing targeted academic support, data-informed PLC collaboration, and aligned instructional systems to strengthen the areas that remain below target while preserving the strong systems already in place.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
1.1	Integration of Career, Community, and Life Skills	Integrate career, community, and life skills into comprehensive K-12 pathways. This action is dedicated to integrating career, community, and life skills within comprehensive K-12 pathways. It focuses on equipping students with the essential capabilities needed to navigate their future careers and community life successfully. By weaving these skills into the curriculum, we aim to ensure students are academically prepared and possess the practical skills required for the modern workforce and societal participation. This initiative prioritizes equitable opportunities for all students, emphasizing support for unduplicated students, to lay the groundwork for successful transitions to higher education and careers. Metrics for Effectiveness: 1.1 Completion of A-G Requirements: The total number of students successfully completing the A-G requirements, indicating readiness for university admission. 1.2 Career Technical Education (CTE) Pathway Completion: The quantity of students completing CTE pathways, reflecting vocational engagement and preparedness. 1.3 Percentage of Students Achieving a Score of 3 or Higher on AP Exams: The proportion of students who attempt and succeed in Advanced Placement exams, demonstrating college-level academic proficiency. Percentage is reflective of participation as well as passing.	$7,069,031.00	Yes

Action #	Title	Description	Total Funds	Contributing
		1.4 College and Career Indicator (CCI) Performance: Evaluation of students' readiness for post-secondary opportunities through the College and Career Indicator, assessing comprehensive preparedness for college and careers. 1.5 Graduation Rate Improvement: An increase in graduation rates, signifying the effectiveness of educational pathways in guiding students to complete their education. 1.6 Maintain Low Middle School Dropout Rates: A maintenance of low dropout rates at the middle school level, identifying early intervention points to maintain student engagement. 1.7 Maintain Low High School Dropout Rates: A maintenance of low dropout rates at the high school level, crucial for assessing the pathways' role in sustaining student engagement through graduation. 1.8 Expansion of Live Synchronous Instruction Courses Aligned with CTE Pathways: The expansion of live synchronous instruction courses that directly support CTE pathways, measuring the integration of career-oriented education within the academic curriculum. This action is crafted to not only achieve academic benchmarks but also to cultivate a comprehensive educational experience that thoroughly prepares students for both college and career trajectories.		
1.2	Refinement of Multi-Tiered System of Support	Refine a personalized, data-informed multi-tiered system of support. The focus of the services is on students from unduplicated and identified populations. This action aims to refine a personalized, data-informed multi-tiered system of support (MTSS) that caters to the unique needs of each student. By leveraging comprehensive data analysis and targeted interventions, we will enhance academic achievement and support emotional and social development. This approach is designed to ensure all students, especially those facing socio-economic challenges, receive the necessary support to excel academically. Metrics for Effectiveness:	$662,003.00	Yes

Action #	Title	Description	Total Funds	Contributing
		1.9 Performance in iReady Assessments for ELA and Math: Proportion of students achieving at or above grade level in iReady assessments for English Language Arts (ELA) and Mathematics, indicating proficiency and readiness. 1.10 California Assessment of Student Performance and Progress (CAASPP) Achievement: Percentage of students who have met or exceeded standards in CAASPP assessments for Math and ELA, reflecting comprehensive academic achievement. 1.11 CAASPP Performance for Socio-Economically Disadvantaged (SED) Students: Percentage of socio-economically disadvantaged students meeting or exceeding CAASPP standards in Math and ELA, highlighting the effectiveness of targeted support. 1.12 Accessibility to Instructional Materials: Percentage of students with full access to necessary instructional materials, ensuring equity in learning resources. 1.13 Alignment with State Standards: Percentage of students whose education is fully aligned with state standards, promoting consistent educational quality. 1.14 Community Belief in Robust Curriculum: Proportion of parents, students, and teachers who believe that students have access to a challenging and comprehensive curriculum supported by resources that enable them to meet and exceed grade-level standards in core content areas. 1.15 LREBG Action Growth in ELA and Math Among Intervention This action has been revised to reflect the strategic use of Learning Recovery Emergency Block Grant (LREBG) and Title 1-A funds to expand staffing and improve teacher-to-student ratios within our intervention programs. By increasing instructional personnel, Sage Oak is able to provide more consistent, small-group, and individualized support for students receiving Tier 2 and Tier 3 interventions. This enhancement directly supports the academic progress of students performing below grade level, particularly those from unduplicated groups and students with disabilities. The goal of this action is to equip students with the skills and confidence needed to meet or exceed grade-level standards. By embedding additional instructional capacity through LREBG and Title 1-A funded staff, we aim to accelerate learning and ensure that a greater percentage of intervention students experience at least one year of academic growth annually. This		

Action #	Title	Description	Total Funds	Contributing
		action reinforces our commitment to equitable access to a robust, rigorous curriculum, supported by the necessary resources and targeted instruction to help all students thrive.		
1.3	Enhancement of Math Proficiency for Students with Disabilities	Improve math proficiency for students with disabilities by increasing the percentage of students with disabilities participating in math interventions. This action is dedicated to improving mathematics proficiency among students with disabilities by expanding their participation in specialized math intervention programs. Recognizing the unique challenges faced by these students, our targeted approach aims to elevate their math skills through personalized and adaptive learning strategies. By doing so, we endeavor to facilitate meaningful academic progress and reduce disparities in math achievement. Metrics for Effectiveness: 1.16 Participation Rate in Math Interventions: Increase in the percentage of students with disabilities participating in math intervention programs, aiming to ensure comprehensive access to support services tailored to their needs. 1.17 Increased iReady Math Achievement for Students with Disabilities (SWD): Measurement of the number of students with disabilities moving out of Tier 3 in iReady math assessments. Tier 3 represents students performing two or more years below grade level. While measuring achievement at or above grade level for this group may not be appropriate, monitoring their progress out of Tier 3 provides a meaningful indicator of improvement in math proficiency. 1.18 California Assessment of Student Performance and Progress (CAASPP) for SWD Math Achievement: Analysis of CAASPP math scores for students with disabilities to track advancements in state-standardized math achievement, with a focus on increasing the percentage of students meeting or exceeding math standards. This action underscores our commitment to inclusivity and equity in education by specifically addressing the needs of students with disabilities.	$86,493.00	No

Action #	Title	Description	Total Funds	Contributing
		Through targeted math interventions, we aim not only to improve math proficiency but also to foster a supportive learning environment that acknowledges and addresses the diverse needs of our student population.		
1.4	Unified Articulation Process Development	Create a unified, data-informed articulation process that smoothly transitions students through each grade band while integrating critical feedback from graduates. This action focuses on developing a unified, data-informed articulation process to ensure smooth transitions for students as they move through each grade band (e.g., from elementary to middle school, and middle school to high school). By integrating feedback from graduates and utilizing comprehensive data analysis, we aim to refine our educational pathways to better prepare students for the expectations and standards of their next academic phase. This process is designed to enhance communication between teachers across grade bands, ensure curriculum continuity, and address any potential gaps in student preparedness. Metrics for Effectiveness: 1.19 Teacher Preparedness for Student Articulation: The percentage of teachers who feel equipped to effectively prepare and transition their students to the next grade level band. This metric will be measured through targeted surveys asking teachers if they feel confident in their ability to communicate the expectations and standards of the next grade level, ensuring they have the resources and knowledge necessary to support their students' progression. By establishing a comprehensive articulation process that leverages both quantitative data and qualitative feedback from our educational community, this action aims to foster a more cohesive and supportive learning environment. It ensures that students are not only academically prepared for each transition but also that educators feel supported and equipped to guide them effectively through their educational journey.	$0.00	No

Action #	Title	Description	Total Funds	Contributing

Goals and Actions

Goal

Goal #	Description	Type of Goal
2	Engagement: Fostering a Supportive and Engaging Learning Environment In order to enhance student, parent, and staff engagement, we will establish an environment that fosters connectedness and professional growth.	Broad Goal

State Priorities addressed by this goal.

Priority 1: Basic (Conditions of Learning)
Priority 3: Parental Involvement (Engagement)
Priority 5: Pupil Engagement (Engagement)
Priority 6: School Climate (Engagement)
Priority 7: Course Access (Conditions of Learning)
Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

Building on Sage Oak's strategic commitment, Goal 2 aims to cultivate a supportive and engaging learning environment by emphasizing the well-being and professional growth of our staff, alongside fostering stronger connections within our school community. This goal is rooted in the belief that the success of our educational mission is intertwined with the development and satisfaction of our educators and staff. By investing in comprehensive professional development, mentorship programs, and creating a nurturing work environment, we aspire to empower our educators. This empowerment is expected to cascade, enhancing the educational experience for students and fostering a sense of belonging and community alignment with Sage Oak's mission and vision.

Sage Oak's efforts are influenced by feedback from the WASC visiting committee and include specific action steps aimed at increasing opportunities for parent and student engagement, developing purposeful professional growth pathways for staff, enhancing live instruction through targeted professional development, and establishing a robust system for social and emotional support. These targeted actions demonstrate Sage Oak's balanced approach to educational excellence, ensuring every member of our community is supported to thrive.

Furthermore, these initiatives directly contribute to increased or improved services for our unduplicated student populations, including socio-economically disadvantaged students, English learners, foster youth, and students with disabilities. By creating a more engaging, supportive, and well-resourced learning environment, we aim to elevate the educational outcomes and well-being of these students, ensuring that our programs and resources are tailored to meet their specific needs and challenges. This aligns with our objectives to deliver equitable, high-quality educational opportunities, making significant strides in supporting all students, particularly those who require additional assistance, to achieve success and reach their full potential.

Through increased staffing funded by the Learning Recovery Emergency Block Grant (LREBG), Sage Oak is expanding access to social-emotional supports as outlined in Goal 2, Action 4. This targeted investment strengthens our ability to meet the diverse needs of all students, supporting their academic growth, social-emotional well-being, and readiness for future college and career pathways. This approach reflects Sage Oak's continued commitment to equitable, high-quality educational opportunities for every learner.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
2.1	Maintenance of Positive Community Engagement Perception % of parents, students, and staff that believe Sage Oak makes a significant effort to foster community engagement	Parents 99% Students 96% Staff 100% Source: Internal 23-24	Parents 87% Students 92% Staff 97%	Parents 93% Students 93% Staff 96%	90% or higher	Parents -6% Students-3% Staff -4%
2.2	Maintain 100% Credentialed Teachers % of credentialed teachers	100% Source: Internal 23-24	100%	100%	100%	0
2.3	Maintenance of High Attendance Rate % of school attendance rates (ADA)	99.9% Source: Internal 23-24	99.5%	99.2%	98% or higher	-.4%
2.4	Maintenance of Low Chronic Absenteeism % of chronic absenteeism	0.8% Source: CA Dashboard 22-23	0%	1.8%	Less than 3%	1%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
2.5	Maintenance of Low Suspension and Expulsion Rates % suspension and expulsion rates	Suspension 0% Expulsion 0% Source: CA Dashboard and Dataquest 22-23	Suspension 0% Expulsion 0%	Suspension 0% Expulsion 0%	Suspension 0% Expulsion 0%	Suspension 0% Expulsion 0%
2.6	Maintain Positive Connection to School's Mission % of the parents, students and staff that feel connected to the school's mission	Parents- 90% Students- 81% Staff- 96% Source: Internal 23-24	Parents 92% Students 89% Staff 95%	Parents 91% Students 86% Staff 98%	Parents 90% or higher Students 90% or higher Staff 90% or higher	Parents 1% Students 5% Staff 2%
2.7	Increased Student Retention Rate student retention rate	59% Source: Internal 22-23	73%	73%	75%	14%
2.8	Maintain Positive School Climate % of the parents, students and staff that feel that the school prioritizes safety, value and respect	Parents 97% Students 98% Staff 97% Source: Internal 23-24	Parents 99% Students 100% Staff 99%	Parents 98% Students 98% Staff 98%	Parents 90% or higher Students 90% or higher Staff 90% or higher	Parents 1% Students 0% Staff 1%
2.9	Confidence and Integration of New Strategies % of staff involved in the Leadership Pathway reporting increased	100% Source: Internal 23-24	100%	90%	100%	-10%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	confidence in their ability to embrace and apply new strategies within their roles					
2.10	Increased Retention Rates of Participating Staff retention rates of staff members who have participated in the professional development pathways	72% Source: Internal 23-24	83%	88%	80%	16%
2.11	Expansion of Professional Development Opportunities # of professional development opportunities offered to staff, focusing on live instruction	4 Source: Internal 23-24	6	20	10	16
2.12	Improved Staff Confidence in Job Performance % of staff who believe they are well-equipped by Sage Oak to perform their roles effectively	96% Source: Internal 23-24	97%	97%	90% or higher	1%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
2.13	Increased Awareness of Socio-Emotional Resources % of parents, students, and staff that report feeling informed about the social and emotional resources provided by Sage Oak	Parents- 85% Students- 93% Staff- 93% Source: Internal 23-24	Parents 91% Students 90% Staff 94%	Parents 95% Students 94% Staff 95%	Parents- 90% or higher Students- 90% or higher Staff- 90% or higher	Parents 10% Students -1% Staff 2%
2.14	Expansion of Synchronous Support Opportunities # of synchronous support groups or classes with counselors	23 Source: Internal 23-24	66	238	29	215

Goal Analysis [2025-26]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Engagement: Fostering a Supportive and Engaging Learning Environment

During the 2025–26 school year, Sage Oak continued implementation of Goal 2 with a focus on strengthening student, parent, and staff engagement through community connection, professional growth, live instruction, and social-emotional supports. Implementation remained aligned with the planned actions and reflected the school's continued commitment to fostering a supportive and engaging learning environment. Core efforts included maintaining meaningful opportunities for involvement and input, sustaining strong communication with educational partners, and continuing to build systems that support both student belonging and staff effectiveness. Additional efforts included supporting staff through purposeful pathways for growth and professional development, strengthening live synchronous instruction, and increasing awareness of and access to social-emotional supports for students and families. Sage Oak also used LREBG funding to help sustain and expand counseling-related supports and real-time student services.

A major success in implementation was the school's continued work to build a connected and supportive culture through communication, engagement opportunities, and student support systems, while carrying out all four planned actions in a coordinated way. Community connection efforts included advisory groups, events, communication structures, and ongoing opportunities for feedback. Professional growth efforts included leadership pathways, program-specific support, and an expanded professional development plan for live instruction that incorporated staff feedback and practical application. Staff also engaged in the Professional Development Passport, a personalized and aligned menu of learning opportunities that allowed teachers and staff to deepen skills in areas most relevant to their roles. Feedback indicated that staff appreciated the opportunity to grow professionally and further develop their practice. This emphasis on staff support and development was also reflected in Sage Oak receiving Top Workplaces recognition, highlighting the school's success in creating a culture where staff feel valued and supported. Social-emotional support systems also grew through increased counseling groups, targeted courses, and stronger communication about available resources. These combined efforts helped reinforce a school culture focused on connection, responsiveness, and support across programs and grade spans. Sage Oak also sustained strong attendance and continued to provide a safe, respectful, and supportive learning environment. In addition, the school maintained purposeful pathways for professional growth and professional development opportunities, including support for live instruction and staff development, while continuing efforts to ensure that parents, students, and staff were informed about available resources and services.

Implementation also revealed areas for continued refinement. Although the school maintained strong overall engagement and support systems, student connection to the school's mission declined in Year 2. In response, Sage Oak is increasing intentional communication around student learning outcomes and encouraging teachers to connect students to enrichment courses aligned with their strengths and interests. These refinements are intended to strengthen student belonging, increase relevance in the student experience, and support stronger connection over time. Student retention remained stable and above baseline, but because it did not improve this year and has not yet reached the three-year target, retention will remain an important focus area moving forward. In addition, as the school expanded professional learning and student supports, staff feedback highlighted the importance of keeping training practical, differentiated, and relevant to specific roles and grade levels.

Overall, Goal 2 was implemented successfully, with strong evidence of progress in school climate, attendance, staff development, and awareness of social-emotional supports, alongside clear direction for continued improvement in student connection and retention.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The school spent materially more on action 2.1 related to budgeted positions being filled and expenditures supporting student engagement activities, on action 2.3 related to student materials and supplies, and 2.4 related to increased expenditures for social and emotional support. The school spent materially less on action 2.2 related to professional development.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Overall Assessment: Effective with Areas of Strong Performance and Continued Refinement

The actions under Goal 2 have been effective in making progress toward the goal of fostering a supportive and engaging learning environment. Year 2 results show particular strength in opportunities for involvement, school climate, attendance, and awareness of social-emotional supports. At the same time, student connection to the school's mission and student retention remain areas for continued refinement in the final year of the cycle.

Enhancing Community Connection Opportunities – Highly Effective

This action has been highly effective in maintaining strong opportunities for involvement and input across the school community. In Year 2, 94% of parents, 92% of students, and 96% of staff reported that Sage Oak makes a significant effort to provide opportunities for involvement and input. School climate was also a clear area of strength, with 98% of parents, 97% of students, and 98% of staff reporting that the school prioritizes a safe, respectful, and supportive learning environment. Attendance remained very strong at 99.2%, further reflecting students' consistent engagement with school. These outcomes suggest that efforts to build a connected and supportive environment are having a meaningful positive impact on the school community.

Climate survey feedback also helps clarify why this action has been effective and where it can continue to be strengthened. Students emphasized the importance of positive teacher-student relationships and expressed appreciation for staff who make them feel safe, valued, and respected through attentive listening, timely responses, and supportive actions. Students also identified a need for stronger communication about mental health resources, greater accessibility to in-person events across geographic regions, and curriculum that feels balanced and practically relevant. Parent feedback reinforced many of these same themes, including the importance of personalized and responsive support from teachers and staff, stronger visibility of social-emotional and mental health resources before they are needed, expanded flexibility in curriculum options, and broader geographic access to in-person events that foster community connection. Taken together, these results indicate that Sage Oak has established a strong foundation in community connection and school climate, while also identifying clear next steps that can further strengthen belonging, responsiveness, and meaningful engagement for students and families.

Connection to Mission and Student Retention – Effective with Forward Progress

Connection to the school's mission showed an area of concern in Year 2, declining from 91% to 85%. This indicates a need for additional focus on helping students see the relevance of their learning experience and feel more connected to the school's purpose. In response, Sage Oak is increasing intentional communication around student learning outcomes and encouraging teachers to connect students to enrichment courses aligned with their strengths and interests. Student retention remained at 73% in Year 2. This remains above baseline, demonstrating that the school's support systems continue to positively influence student persistence; however, because retention did not improve this year and remains below the three-year target of 75%, this metric is best described as effective with forward progress rather than highly effective.

Professional Growth Pathways - Effective with Forward Progress

In Year 2, 90% of staff participating in leadership pathways reported confidence in implementing new strategies. While this reflects a decline from prior levels, it still indicates a strong level of confidence and continued positive impact. At the same time, retention rates for staff participating in leadership pathways increased to 88%, demonstrating that the program continues to support staff development and long-term investment in leadership capacity. This suggests that the action remains effective, while also signaling an opportunity to strengthen coaching, follow-up support, and implementation structures so staff feel increasingly confident applying new learning in practice.

Professional Development for Live Instruction - Highly effective

The number of professional development opportunities focused on live instruction rose to 20 in Year 2, reflecting Sage Oak's strong investment in instructional excellence and significantly expanding support for teachers. These sessions were grounded in evidence-based practices and focused on strengthening live synchronous instruction through high-impact strategies, educational technology, and AI integration. Key themes included clarifying learning goals, strengthening classroom discussion, and using instructional tools such as Nearpod, Classkick, Canva, MagicSchool AI, Kami, Gimkit, and Zoom to improve engagement, formative assessment, differentiation, and efficiency. Staff feedback consistently showed that teachers valued hands-on learning, collaboration with colleagues, and practical strategies they could apply immediately in their classes.

Professional Development Passport and Refinement Through Staff Feedback – Highly Effective

Sage Oak's broader professional learning system was also highly effective. The Professional Development Passport provided staff with a personalized and aligned menu of learning opportunities, allowing teachers and staff to deepen skills in areas most relevant to their roles and professional goals. Feedback indicated that staff appreciated the opportunity to grow professionally and further hone their practice. The professional development plan also demonstrates that Sage Oak refined sessions in response to staff feedback throughout the year, making the training increasingly targeted and relevant. Teachers consistently emphasized the value of breakout sessions, program-specific support, and opportunities to explore tools from both teacher and student perspectives. Feedback across sessions showed high levels of relevance and usefulness, and 97% of staff reported feeling well-equipped based on the professional development they received during the year. These results indicate that Sage Oak's investment in professional learning is strengthening staff capacity and supporting more effective instruction across programs.

Development of Social and Emotional Support Systems – Highly Effective

In Year 2, 92% of parents, 91% of students, and 95% of staff reported being informed about available social-emotional resources, indicating strong awareness across stakeholder groups. In addition, synchronous counseling groups and classes expanded significantly, reaching 238 sessions this year with consistently strong student engagement. Popular offerings included executive functioning support through Life Hacks at the high school level and Brain Boss for students in grades 3–8. AVID was also successfully introduced for middle school students, further strengthening support in organization, study skills, and college readiness. These results demonstrate that Sage Oak has made substantial progress in expanding both access to and awareness of social-emotional and student support services.

Conclusion

Overall, the actions under Goal 2 have been effective in making progress toward the goal. The strongest areas of impact include attendance, staff development, and awareness of social-emotional supports. The main areas requiring continued refinement are student connection to mission and student retention. The addition of staff-centered successes, including Top Workplace recognition and the strong response to the Professional Development Passport, further reinforces that Sage Oak is building a culture where staff feel supported, valued, and equipped to grow. Taken together, these results show that Goal 2 actions are producing meaningful positive outcomes and are building a strong foundation for continued growth in the final year of the cycle. Taken together, these results show that Goal 2 actions are supporting a positive

and engaging school environment, while also highlighting the importance of continued focus on belonging, relevance, and long-term student persistence.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Based on reflection on prior practice, no major changes were made to the overall structure of Goal 2. The goal, metrics, and actions remain relevant and aligned with identified needs. However, Year 2 results indicate the importance of continuing to strengthen student connection to the school's mission and improving student retention. In response, the school will place additional emphasis on communication of student learning outcomes through report cards and on helping teachers connect students to enrichment opportunities that align with their strengths and interests.

For the coming year, Sage Oak will continue to build on the strong foundation already established in school climate, attendance, staff growth, and social-emotional support awareness. The school will maintain its current actions while refining implementation in ways that strengthen belonging, relevance, and sustained student engagement over time. These refinements are intended to support growth in the areas that remain below target while preserving the strong systems already in place.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
2.1	Enhancing Community Connection Opportunities	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. This action is dedicated to increasing opportunities for meaningful engagement among parents, students, and school leadership. By fostering a deeper sense of community and ensuring alignment with the school's mission and vision, we aim to create an inclusive environment that supports professional growth and student success. Initiatives will include structured forums for feedback, engagement events, and clear communication channels that encourage active participation from all members of our school community. Metrics for Effectiveness:	$550,798.00	Yes

Action #	Title	Description	Total Funds	Contributing
		2.1 Community Engagement Perception: Measurement of the community's perception regarding the school's efforts to provide opportunities for involvement and input. This will be assessed through surveys asking if participants believe Sage Oak makes a significant effort to foster community engagement. 2.2 Retention of Credentialed Teachers: Maintaining a 100% rate of credentialed teachers, ensuring that students have access to qualified and dedicated professionals. 2.3 Attendance Rate Stability: Maintenance of school attendance rates at optimal levels, reflecting student engagement and a supportive learning environment. 2.4 Low Chronic Absenteeism: Sustaining low rates of chronic absenteeism, indicating an engaging and welcoming school climate that motivates regular attendance. 2.5 Low Suspension and Expulsion Rates: Keeping suspension and expulsion rates minimal, demonstrating effective behavior management and a positive school culture. 2.6 Connection to School's Mission: Proportion of the school community that feels connected to the school's mission of empowering students, as measured by targeted surveys. This metric gauges the alignment of community values with the school's objectives. 2.7 Student Retention Rate Improvement: An increase in the student retention rate, indicating success in creating a supportive and engaging environment that encourages students to continue their education at Sage Oak. 2.8 School Climate: Proportion of the school community that feels safe, respected and values, as measured by targeted surveys. This metric gauges the alignment of community values with the school's objectives. Through these targeted actions and metrics, we aim to not only enhance the sense of community and engagement within our school but also to ensure that our educational environment is conducive to professional growth, student success, and sustained participation from our entire school community.		

Action #	Title	Description	Total Funds	Contributing
2.2	Development of Professional Growth Pathways	Develop purposeful pathways for growth and opportunities for professional development. This action focuses on creating purposeful pathways for professional growth, offering expansive opportunities for all staff members to develop. By initiating comprehensive leadership and professional development programs, we aim to equip our staff with the skills and confidence necessary to innovate and enhance their respective practices across the board. This initiative is designed to cultivate a culture that values continuous learning, adaptability, and professional excellence, contributing significantly to the overall effectiveness and sustainability of our educational environment. Metrics for Effectiveness: 2.9 Confidence and Integration of New Strategies: The proportion of staff involved in the Leadership Pathway reporting increased confidence in their ability to embrace and apply new strategies within their roles. This will be assessed through surveys that inquire about their readiness to incorporate these strategies into future practices, reflecting the professional development programs' impact on enhancing staff capabilities. 2.10 Retention Rates of Participating Staff: The retention rates of staff members who have participated in the professional development pathways will be closely monitored. A positive trend in these rates would indicate the success of the development opportunities inpromoting job satisfaction, personal growth, and a strong commitment to the institution. This action underscores our dedication to fostering professional growth and development across all staff levels, enhancing our school's capacity to provide a high-quality, supportive, and engaging learning environment for all community members.	$246,682.00	Yes
2.3	Enhancement of Professional Development for Live Instruction	Increase professional development for live instruction. This action targets the expansion of professional development opportunities tailored to live instruction, aiming to empower our staff with the skills and techniques necessary for dynamic and effective real-time	$45,353.00	Yes

Action #	Title	Description	Total Funds	Contributing
		teaching. By providing a diverse array of training sessions, workshops, and seminars focused on live instructional strategies, we are committed to ensuring that all staff members feel confident and well-prepared to engage students in a live setting. This initiative is designed to elevate the quality of live instruction, ensuring that our educational delivery is both impactful and engaging. Metrics for Effectiveness: 2.11 Expansion of Professional Development Opportunities: Tracking the increase in professional development opportunities offered to staff, focusing on live instruction. This metric will encompass school-created programs and external training opportunities included in our professional development portfolio. 2.12 Staff Confidence in Job Performance: The percentage of staff who believe they are well-equipped by Sage Oak to perform their roles effectively, particularly in the context of live instruction, based on the professional development received. This will be measured through surveys assessing staff perceptions of their preparedness and the adequacy of professional development support provided by the school. Through this targeted approach to professional development, we aim to not only enhance the effectiveness of live instruction but also to foster a culture of continuous learning and adaptability among our staff. This action reaffirms our commitment to supporting professional excellence and student success in every live instructional encounter.		
2.4	Development of Social and Emotional Support Systems	Develop a system to increase access and consistency for social and emotional resources and interventions. This action is dedicated to developing a comprehensive system designed to increase access to and consistency of social and emotional resources and interventions for our school community. Recognizing the critical importance of social and emotional well-being in educational success, we aim to ensure that students, parents, and teachers are well-informed and have easy access to the support services they need. Through this initiative, we will enhance our existing resources, introduce new interventions, and	$68,095.00	Yes

Action #	Title	Description	Total Funds	Contributing
		expand synchronous support opportunities, such as groups or classes led by counselors, to address the diverse needs of our community effectively. Additionally, this action has been revised to reflect the strategic use of Learning Recovery Emergency Block Grant (LREBG) funds to expand staffing and improve teacher-to-student ratios within our counseling offerings. Metrics for Effectiveness: 2.13 Awareness of Socio-Emotional Resources: The percentage of parents, students, and teachers that report feeling informed about the social and emotional resources provided by Sage Oak. This measure will assess the effectiveness of our communication strategies and the accessibility of our resources. 2.14 Expansion of Synchronous Support Opportunities: The increase in the number of synchronous support groups or classes with counselors, reflecting our commitment to providing real-time, interactive support sessions that cater to the emotional and social needs of our students. By implementing this action, we aim to create a nurturing and supportive environment that prioritizes the social and emotional well-being of our students. This comprehensive support system will not only address immediate needs but also contribute to the long-term resilience and success of our school community.		

Goals and Actions

Goal

Goal #	Description	Type of Goal
3	Conditions of Learning: Efficient Operations with a Focus on Sustainability Leverage technologies, specifically Artificial Intelligence, 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.	Broad Goal

State Priorities addressed by this goal.

Priority 1: Basic (Conditions of Learning)
Priority 2: State Standards (Conditions of Learning)
Priority 4: Pupil Achievement (Pupil Outcomes)
Priority 7: Course Access (Conditions of Learning)
Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

Understanding the importance of future-proofing its educational approach, Sage Oak integrates robust systems that prioritize sustainability and efficiency into its strategic plan. This initiative focuses on streamlining operations, optimizing resources, and adopting sustainable practices, aligning with the school's mission and values. By leveraging Artificial Intelligence and other advanced technologies, Sage Oak aims to provide personalized learning pathways, ensuring education is more accessible, engaging, and effective for students. This forward-thinking approach prepares the Sage Oak community for a rapidly evolving educational landscape, embodying the school's commitment to innovation and excellence.

Sage Oak's current staff-to-student ratio of 13:1 highlights our dedicated investment in staffing to ensure personalized learning. With efforts to enhance operational efficiency, we anticipate a more optimized staff-to-student ratio. This adjustment will enable us to extend our educational reach without compromising the quality of instruction. By streamlining administrative tasks, teachers can dedicate more attention to enriching student interactions, further improving the educational experience. This strategic approach ensures that resources are maximized for the direct benefit of our students, aligning with our mission to provide high-quality, focused education.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
3.1	Staff to Student Ratio Improvement staff to student ratio	13:1 Source: Internal 22-23	13:1	13:1	19:1	0
3.2	Improved Work Efficiency and Satisfaction % of staff reporting noticeable improvements in work efficiency and satisfaction	93% Source: Internal 22-23	92%	96%	90% or higher	2%
3.3	Increased Staff Confidence in Using AI Tools % of staff reporting confidence in their ability to use AI tools to improve learning outcomes	79% Source: internal 23-24	91%	95%	90% or higher	16%

Goal Analysis [2025-26]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Efficiency and Innovation: Building Sustainable Systems Through Technology and AI

During the 2025–26 school year, Goal 3 focused on strengthening operational efficiency and long-term sustainability through the thoughtful integration of technology and Artificial Intelligence (AI). Grounded in Sage Oak's strategic plan, implementation emphasized streamlining operational systems, improving staff efficiency, and increasing staff capacity to use AI tools in ways that support teaching, learning, and responsive service delivery. The goal remained centered on technology optimization for enhanced operations and AI-driven personalized learning implementation, and implementation remained closely aligned with the original LCAP plan.

Throughout the year, Sage Oak continued evaluating and refining internal systems to improve efficiency and reduce time spent on routine operational processes. Technology was used to streamline practices such as scheduling, attendance-related systems, form processing, survey analysis, and instructional preparation, helping reduce manual workload and improve consistency across departments. At the same time, staff continued building familiarity and confidence in using AI and educational technology to support lesson planning, progress monitoring, assessment feedback, and other personalized instructional applications. These efforts reflected Sage Oak's continued investment in practical, meaningful, and instructionally relevant AI integration.

A major part of this year's work was Sage Oak's collaboration with an external consultant to support the development of the school's AI policy. As part of this process, the consultant engaged with individuals across the organization who are involved with AI, conducted an AI SWOT analysis, and provided a report outlining strengths, weaknesses, opportunities, and threats related to Sage Oak's current and future use of AI. This approach helped the school better understand its current landscape, identify areas for growth and caution, and take a more strategic and informed approach to long-term AI implementation.

Implementation of Goal 3 led Sage Oak to refine how we define efficiency. Rather than increasing the overall student to staff ratio from 13:1 to 19:1, Sage Oak maintained the 13:1 ratio and shifted staffing and resources toward direct student support. Over the past year, the school increased instructional staffing and reduced the proportion of non instructional roles through improved systems, technology, and AI supported efficiencies. This shift strengthened teaching, intervention, counseling, planning, and other student facing services preserving the human connection central to Sage Oak's approach. As a result, progress under Goal 3 is reflected not in a higher overall ratio, but in a greater percentage of staff directly serving students and supporting student outcomes.

While implementation was strong overall, the school also identified areas for continued refinement. Although staff readiness and workflow efficiency showed positive growth, the direct impact of AI-supported personalization on student academic outcomes is still developing and will require continued monitoring over time. Sage Oak also continued refining cross-departmental alignment so that technology systems remain scalable, sustainable, and responsive to the school's evolving needs.

Overall, Goal 3 was implemented successfully and remained closely aligned with the planned actions. The strongest areas of implementation included workflow efficiency, staff readiness to use AI tools, the strategic development of an AI policy framework, and the continued creation of scalable systems that support both operations and instruction. At the same time, the school continues to refine how long-term outcomes are measured, particularly in relation to organizational capacity and the instructional impact of AI-supported personalization. Taken together, these results show that Goal 3 actions are producing meaningful progress and establishing a strong foundation for continued growth in the final year of the cycle.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The school spent materially more on actions 3.1 and 3.2 related to increased expenditures for enhancing the schools technology operations and development for artificial intelligence personalized learning.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Overall Assessment: Effective to Highly Effective

The actions under Goal 3 have been effective to highly effective in making progress toward the goal of increasing operational efficiency, building staff capacity, and establishing more sustainable systems through the use of technology and AI. The strongest evidence of progress is seen in staff-reported efficiency, satisfaction, and confidence in using AI tools. At the same time, some long-term outcomes, particularly the staff-to-student ratio and the direct impact of AI-supported personalization on student learning, are still developing and will require continued refinement and monitoring.

Technology Optimization for Enhanced Operations – Highly Effective

This action has been highly effective in improving workflow efficiency and staff capacity. Leadership staff reporting noticeable improvements in work efficiency and satisfaction increased to 96% in Year 2, exceeding the target of 90% or higher. These results suggest that efforts to streamline operational systems, automate repeatable processes, and improve technology-supported workflows are having a positive effect on day-to-day practice. Rather than viewing the total staff-to-student ratio solely as a metric to increase, Sage Oak's implementation of Goal 3 clarified that the more meaningful priority is ensuring that staffing structures directly support student outcomes. During this cycle, the school intentionally increased instructional spending and prioritized shifting staffing and resources toward direct instructional and student-facing supports. As a result, Sage Oak has identified the 13:1 staff-to-student ratio as an important metric to maintain in order to best evaluate effectiveness in student outcomes while continuing to build efficiency through improved systems and technology. This suggests that progress under this action is better reflected in increased staff capacity, stronger instructional investment, and improved service delivery than in movement toward a higher ratio alone.

AI-Driven Personalized Learning Implementation – Highly Effective

This action has also been highly effective in increasing staff readiness to use AI as a tool to support teaching and learning. Staff confidence in using AI tools increased from a baseline of 79% to 95% in Year 2, surpassing the target of 90%. These gains indicate meaningful growth in staff comfort and skill in using AI for lesson planning, assessment feedback, progress monitoring, and other instructional supports. In addition, Sage Oak's collaboration with an external consultant to support development of the school's AI policy strengthened this work by helping the organization take a more strategic and informed approach to implementation. Through stakeholder engagement, an AI SWOT analysis, and a report identifying strengths, weaknesses, opportunities, and threats, the school was able to better understand its current landscape and build a stronger foundation for responsible and sustainable AI integration.

Long-Term Impact and Continued Refinement – Effective with Forward Progress

While Goal 3 actions are clearly producing positive results, some longer-term outcomes are still evolving. The most important learning from implementation is that efficiency at Sage Oak is better understood through increased organizational capacity and stronger alignment of staffing to student needs than through a change in the total staff-to-student ratio by itself. The school's ability to maintain a 13:1 ratio while shifting resources toward instruction and direct student support reflects meaningful progress in this area. At the same time, the measurable effect of AI-supported personalization on student academic outcomes remains more difficult to isolate than staff-capacity and workflow

measures. These areas are best described as effective with forward progress, as the systems, staff readiness, and implementation conditions are strengthening, even if some broader impacts will take longer to measure. Sage Oak remains committed to a student-centered approach in which technology and AI are used to amplify staff effectiveness rather than replace relationships or direct support.

Conclusion

Overall, the actions under Goal 3 have been effective to highly effective in making progress toward the goal. The clearest areas of impact include improved operational efficiency, stronger staff confidence in using AI tools, the strategic development of an AI policy framework, and a more intentional alignment of staffing and instructional investment to support student outcomes. The main area requiring continued refinement is how the school measures long-term impact, particularly the academic effect of AI-supported personalization. Taken together, these results show that Goal 3 actions are strengthening Sage Oak's operational foundation while preserving its commitment to a high-touch, student-centered model of service.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Based on reflection on prior practice, no changes will be made to the planned goal, metrics, target outcomes, or actions for Goal 3. The goal remains relevant and aligned with Sage Oak's ongoing priorities related to operational efficiency, sustainability, and the thoughtful integration of technology and Artificial Intelligence (AI). Implementation to date suggests that the current goal structure continues to support the school's efforts to strengthen systems, increase staff capacity, and improve service delivery while maintaining a high-touch, student-centered model.

For the coming year, Sage Oak will continue refining implementation of Goal 3 by focusing on systems that increase staff capacity and service efficiency while preserving student-centered supports. The school will prioritize automation of routine tasks, clearer workflow alignment across departments, and expanded practical AI use cases so that technology amplifies staff effectiveness rather than replacing human interaction. These refinements are intended to build on the progress already made in workflow efficiency and staff confidence with AI tools while continuing to strengthen long-term sustainability and organizational capacity.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
3.1	Technology Optimization for	Evaluate, integrate, and optimize technology to streamline and automate operational processes and procedures.	$571,678.00	No

Action #	Title	Description	Total Funds	Contributing
	Enhanced Operations	This action focuses on the strategic evaluation, integration, and optimization of technology systems to streamline operational processes, reduce inefficiencies, and strengthen long-term organizational sustainability. With a particular emphasis on Artificial Intelligence (AI), Sage Oak will continue identifying opportunities to automate routine and repetitive tasks, improve internal workflows, and enhance the efficiency of day-to-day operations across departments. This includes the continued use of technology to support scheduling, data analysis, communication systems, survey processing, form management, and other operational procedures that can be improved through automation and streamlined design. Through this work, Sage Oak seeks not to reduce staffing, but to increase the school's ability to do more with the staff it has while preserving a high-touch, student-centered model. As the school has expanded key people-centered supports, including IT, counseling for SEL and planning, and intervention services, technology serves as a tool to strengthen staff capacity and allow personnel to devote more time to direct student and family support. By refining systems and reducing manual workload, this action supports more efficient use of resources while maintaining the relationships and personalized support that are central to Sage Oak's educational model. Metrics for Effectiveness: 3.1 Staff-to-Student Ratio Improvement: Monitoring changes in the staff-to-student ratio as one indicator of increased organizational capacity and more efficient distribution of resources over time. While the school remains committed to maintaining strong student supports, this metric reflects the long-term goal of improving operational scalability through more efficient systems and workflows.. 3.2 Work Efficiency and Satisfaction: The percentage of staff reporting noticeable improvements in work efficiency and satisfaction following the implementation of new technology solutions. This metric will continue to be assessed through internal surveys designed to capture staff perceptions of how technology improvements support their daily work and overall effectiveness.		

Action #	Title	Description	Total Funds	Contributing
		Through this initiative, Sage Oak aims to build a more streamlined, efficient, and sustainable operational framework that supports staff effectiveness, protects people-centered services, and enhances the conditions of learning for students and staff.		
3.2	AI-Driven Personalized Learning Implementation	Implement AI-driven personalized learning strategies to maximize student learning. This action focuses on the thoughtful implementation of Artificial Intelligence (AI)-supported strategies to strengthen teaching, learning, and personalized academic support for students. Sage Oak will continue building staff capacity to use AI tools in ways that enhance instructional planning, support differentiated learning, improve progress monitoring, and increase responsiveness to student needs. AI will be used to help staff develop more adaptive and efficient approaches to instruction while maintaining the school's commitment to personalized, relationship-based learning. This work is grounded in Sage Oak's belief that AI should amplify, not replace, the work of educators and support staff. Professional learning and guided implementation will continue to help staff use AI responsibly and effectively in areas such as lesson design, feedback, resource development, and instructional support. As staff confidence and competence continue to grow, AI-supported practices will help create more flexible and engaging learning experiences for students while increasing staff efficiency and instructional capacity. Metrics for Effectiveness: 3.3 Staff Confidence in Using AI Tools: The percentage of staff reporting confidence in their ability to use AI tools to improve learning outcomes, based on training and implementation support received. This metric will assess the effectiveness of professional development efforts in preparing staff to use AI as a practical and responsible tool for personalized learning and instructional improvement.	$31,627.00	Yes

Action #	Title	Description	Total Funds	Contributing
		Through the continued implementation of AI-supported personalized learning strategies, Sage Oak aims to create a more engaging, inclusive, and effective educational environment that responds to diverse student needs while supporting academic growth and operational efficiency.		

Goals and Actions

Goal

Goal #	Description	Type of Goal
4		

State Priorities addressed by this goal.

An explanation of why the LEA has developed this goal.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline

Goal Analysis [2025-26]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing

Goals and Actions

Goal

Goal #	Description	Type of Goal
5		

State Priorities addressed by this goal.

An explanation of why the LEA has developed this goal.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline

Goal Analysis [2025-26]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2026-27]

Total Projected LCFF Supplemental and/or Concentration Grants	Projected Additional 15 percent LCFF Concentration Grant
$$807,698	$

Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
11.306%	0.000%	$0.00	11.306%

The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.

Required Descriptions

LEA-wide and Schoolwide Actions

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
1.1	**Action:** Integration of Career, Community, and Life Skills **Need:** All students, including unduplicated students, require enhanced access to career, community, and life skills education due to historical inequities and limited access to external resources.	This action provides enhanced access to career, community, and life skills education through dedicated synchronous courses and counseling supports (Action 1.1). While offered LEA-wide, the curriculum and support are intentionally designed with differentiated content and targeted outreach to ensure unduplicated students, who historically have less access to these resources, receive services that are increased in intensity and improved in quality and relevance compared to a universal offering without these targeted elements.	Completion of A-G Requirements, Career Technical Education (CTE) Pathway Completion, Percentage of Students Achieving a Score of 3 or Higher on AP Exams.

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
	Scope: LEA-wide	This is the most effective approach to ensure equitable access and outcomes across the geographically diverse LEA.	
1.2	**Action:** Refinement of Multi-Tiered System of Support **Need:** Unduplicated students demonstrate persistent academic achievement gaps and socio-emotional needs requiring intensified and differentiated support. **Scope:** LEA-wide	This action refines the LEA-wide MTSS to provide increased levels of targeted, small-group instruction and improved socio-emotional supports (Action 1.2), particularly for unduplicated students identified through data analysis. The LEA-wide scope ensures consistent access to these tiered interventions across all locations, but the design and resource allocation (including LREBG-funded staffing) are principally directed towards and intensified for unduplicated pupils to accelerate their academic growth and address well-being challenges more effectively than a universal support system.	Maintenance of Positive Community Engagement Perception, Maintenance of High Attendance Rate, Maintenance of Low Chronic Absenteeism.
2.1	**Action:** Enhancing Community Connection Opportunities **Need:** Foster youth, English learners, and low-income students often face barriers to full participation in school activities, which can affect their sense of belonging and engagement with the school community. **Scope:** LEA-wide	Increasing community connection opportunities addresses this need by creating inclusive, accessible engagement activities that encourage participation from all students and their families, regardless of background. This action aims to build a stronger, more cohesive school community where unduplicated students feel valued and supported.	Maintenance of Positive Community Engagement Perception, Maintenance of High Attendance Rate, Maintenance of Low Chronic Absenteeism.
2.2	**Action:** Development of Professional Growth Pathways	Providing professional growth pathways for all educators ensures a high-quality educational experience for every student, including	Increased Confidence and Integration of New Strategies by staff, and

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
	Need: Educators require ongoing professional development to effectively meet the diverse needs of all students, fostering an engaging and supportive learning environment. **Scope:** LEA-wide	unduplicated students. This school wide action supports the continuous improvement of teaching strategies that directly benefit these groups by enhancing educators' skills and knowledge.	retention rates of participating staff, which indirectly reflect the improved educational environment for unduplicated students.
2.3	**Action:** Enhancement of Professional Development for Live Instruction **Need:** Effective live instruction requires specific pedagogical skills, particularly to engage unduplicated students who may have varied learning needs and preferences. **Scope:** LEA-wide	Enhancing professional development for live instruction across the LEA ensures that all educators are equipped to deliver engaging, high-quality live instruction that caters to the diverse needs of all students, including unduplicated groups. This approach is crucial for maintaining student engagement and improving learning outcomes.	Expansion of Professional Development Opportunities focusing on live instruction, and improvement in staff confidence in job performance, particularly in engaging and instructing unduplicated students effectively.
2.4	**Action:** Development of Social and Emotional Support Systems **Need:** Unduplicated students, particularly foster youth, English learners, low-income, and homeless students, face significant socio-emotional barriers impacting their educational success.	This action develops an LEA-wide system to increase access to and improve the consistency and targeting of social and emotional resources and interventions (Action 2.4). While available to all, the system is designed with specific components, such as dedicated counselor support and tailored interventions (including LREBG-funded staffing), that are principally directed towards and intensified for unduplicated students to address their unique and heightened socio-emotional needs more effectively than a universal approach. The LEA-wide scope ensures equitable	Awareness of Socio-Emotional Resources, Expansion of Synchronous Support Opportunities

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
	Scope: LEA-wide	access to these intensified supports across all locations.	
3.2	**Action:** AI-Driven Personalized Learning Implementation **Need:** English learners and low-income students, in particular, benefit from personalized learning strategies that tailor instruction to their unique needs and learning styles, addressing gaps in knowledge and accelerating progress. **Scope:** LEA-wide	Implementing AI-driven personalized learning strategies on a schoolwide basis ensures that all students, especially unduplicated students, receive customized educational experiences designed to maximize their learning potential. This approach is critical for closing achievement gaps and supporting the academic growth of each student.	Increased Staff Confidence in Using AI Tools, Staff to Student Ratio Improvement, Improved Work Efficiency and Satisfaction.

Limited Actions

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

Goal and Action #	Identified Need(s)	How the Action(s) are Designed to Address Need(s)	Metric(s) to Monitor Effectiveness

For any limited action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage, as applicable.

Additional Concentration Grant Funding

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

n/a

Staff-to-student ratios by type of school and concentration of unduplicated students	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students	n/a	n/a
Staff-to-student ratio of certificated staff providing direct services to students	n/a	n/a

2026-27 Total Planned Expenditures Table

LCAP Year	1. Projected LCFF Base Grant (Input Dollar Amount)	2. Projected LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Input Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)
Totals	$ 7,143,981	$807,698	11.306%	0.000%	11.306%

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	$7,631,247.00	$1,594,717.00	$0.00	$105,796.00	$9,331,760.00	$6,812,841.00	$2,518,919.00

Goal #	Action #	Action Title	Student Group(s)	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Planned Percentage of Improved Services
1	1.1	Integration of Career, Community, and Life Skills	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2026-27	$5,431,802.00	$1,637,229.00	$5,882,303.00	$1,169,711.00	$0.00	$17,017.00	$7,069,031.00	
1	1.2	Refinement of Multi-Tiered System of Support	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2026-27	$566,314.00	$95,689.00	$303,433.00	$269,791.00	$0.00	$88,779.00	$662,003.00	
1	1.3	Enhancement of Math Proficiency for Students with Disabilities	Students with Disabilities	No			All Schools	Fiscal 2026-27	$0.00	$86,493.00	$3,410.00	$83,083.00	$0.00	$0.00	$86,493.00	
1	1.4	Unified Articulation Process Development	All	No			All Schools	Fiscal 2026-27	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	
2	2.1	Enhancing Community Connection Opportunities	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2026-27	$508,041.00	$42,757.00	$548,543.00	$2,255.00	$0.00	$0.00	$550,798.00	
2	2.2	Development of Professional Growth Pathways	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2026-27	$0.00	$246,682.00	$244,900.00	$1,782.00	$0.00	$0.00	$246,682.00	
2	2.3	Enhancement of Professional Development for Live Instruction	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2026-27	$0.00	$45,353.00	$45,353.00	$0.00	$0.00	$0.00	$45,353.00	
2	2.4	Development of Social and Emotional Support Systems	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2026-27	$68,095.00	$0.00	$0.00	$68,095.00	$0.00	$0.00	$68,095.00	
3	3.1	Technology Optimization for Enhanced Operations	All	No			All Schools	Fiscal 2026-27	$238,589.00	$333,089.00	$571,678.00	$0.00	$0.00	$0.00	$571,678.00	
3	3.2	AI-Driven Personalized Learning Implementation	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2026-27	$0.00	$31,627.00	$31,627.00	$0.00	$0.00	$0.00	$31,627.00	

2026-27 Contributing Actions Table

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)	Totals by Type	Total LCFF Funds
$ 7,143,981	$807,698	11.306%	0.000%	11.306%	$7,056,159.00	0.000%	98.771 %	**Total:**	$7,056,159.00
								LEA-wide Total:	$7,056,159.00
								Limited Total:	$0.00
								Schoolwide Total:	$0.00

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
1	1.1	Integration of Career, Community, and Life Skills	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$5,882,303.00	
1	1.2	Refinement of Multi-Tiered System of Support	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$303,433.00	
2	2.1	Enhancing Community Connection Opportunities	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$548,543.00	
2	2.2	Development of Professional Growth Pathways	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$244,900.00	
2	2.3	Enhancement of Professional Development for Live Instruction	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$45,353.00	
2	2.4	Development of Social and Emotional Support Systems	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$0.00	
3	3.2	AI-Driven Personalized Learning Implementation	Yes	LEA-wide	English Learners Foster Youth	All Schools	$31,627.00	

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
					Low Income			

2025-26 Annual Update Table

Totals	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Expenditures (Total Funds)
Totals	$6,618,085.00	$7,771,676.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	**1.1**	Integration of Career, Community, and Life Skills	Yes	$5,068,700.00	$5,779,599
1	**1.2**	Refinement of Multi-Tiered System of Support	Yes	$467,563.00	$474,311
1	**1.3**	Enhancement of Math Proficiency for Students with Disabilities	No	$76,694.00	$124,227
1	**1.4**	Unified Articulation Process Development	No	$0.00	
2	**2.1**	Enhancing Community Connection Opportunities	Yes	$441,845.00	$489,273
2	**2.2**	Development of Professional Growth Pathways	Yes	$143,590.00	$141,913
2	**2.3**	Enhancement of Professional Development for Live Instruction	Yes	$26,250.00	$33,334
2	**2.4**	Development of Social and Emotional Support Systems	Yes	$41,361.00	$60,018
3	**3.1**	Technology Optimization for Enhanced Operations	No	$312,384.00	$628,325
3	**3.2**	AI-Driven Personalized Learning Implementation	Yes	$39,698.00	$40,676

2025-26 Contributing Actions Annual Update Table

6. Estimated LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Expenditures for Contributing Actions (Subtract 7 from 4)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Percentage of Improved Services (%)	Difference Between Planned and Estimated Percentage of Improved Services (Subtract 5 from 8)
627,340	$4,785,098.00	$5,591,582.00	($806,484.00)	0.000%	0.000%	0.000%

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributing to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services (Input Percentage)
1	1.1	Integration of Career, Community, and Life Skills	Yes	$4,029,986.00	$4,753,012		
1	1.2	Refinement of Multi-Tiered System of Support	Yes	$190,074.00	$198,934		
2	2.1	Enhancing Community Connection Opportunities	Yes	$440,351.00	$485,536		
2	2.2	Development of Professional Growth Pathways	Yes	$70,243.00	$93,511		
2	2.3	Enhancement of Professional Development for Live Instruction	Yes	$26,250.00	$33,334		
2	2.4	Development of Social and Emotional Support Systems	Yes	$0.00			
3	3.2	AI-Driven Personalized Learning Implementation	Yes	$28,194.00	$27,255		

2025-26 LCFF Carryover Table

9. Estimated Actual LCFF Base Grant (Input Dollar Amount)	6. Estimated Actual LCFF Supplemental and/or Concentration Grants	LCFF Carryover — Percentage (Percentage from Prior Year)	10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	8. Total Estimated Actual Percentage of Improved Services (%)	11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9)	13. LCFF Carryover — Percentage (12 divided by 9)
$6,095,410	627,340	0	10.292%	$5,591,582.00	0.000%	91.734%	$0.00	0.000%

Local Control and Accountability Plan Instructions

Plan Summary

Engaging Educational Partners

Goals and Actions

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at LCFF@cde.ca.gov.

Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (California Education Code [EC] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.

- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (EC Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.

- **Accountability and Compliance:** The LCAP serves an important accountability function because the nature of some LCAP template sections require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:

    - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, including long-term English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (EC Section 52064[b][4-6]).

    - Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (EC sections 52064[b][1] and [2]).

        - **NOTE:** As specified in EC Section 62064(b)(1), the LCAP must provide a description of the annual goals, for all pupils and each subgroup of pupils identified pursuant to EC Section 52052, to be achieved for each of the state priorities. Beginning in 2023–24, EC

Section 52052 identifies long-term English learners as a separate and distinct pupil subgroup with a numerical significance at 15 students.

- Annually reviewing and updating the LCAP to reflect progress toward the goals (EC Section 52064[b][7]).
- Ensuring that all increases attributable to supplemental and concentration grant calculations, including concentration grant add-on funding and/or LCFF carryover, are reflected in the LCAP (EC sections 52064[b][6], [8], and [11]).

The LCAP template, like each LEA's final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which must: (a) reflect comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (Dashboard), (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in EC sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity's budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2024–25, 2025–26, and 2026–27 school years reflects statutory changes made through Senate Bill 114 (Committee on Budget and Fiscal Review), Chapter 48, Statutes of 2023 and Senate Bill 153, Chapter 38, Statues of 2024.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA's diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

> Given present performance across the state priorities and on indicators in the Dashboard, how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions which, based on research, experience, and input gathered from educational partners, the LEA believes will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP but may include information about effective practices when developing the LCAP and completing the LCAP document. Additionally, the beginning of each template section includes information emphasizing the purpose that section serves.

Plan Summary

Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to present a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included throughout each subsequent section of the LCAP.

Requirements and Instructions

General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA. LEAs may also provide information about their strategic plan, vision, etc.

Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA.

- For example, information about an LEA in terms of geography, enrollment, employment, the number and size of specific schools, recent community challenges, and other such information the LEA may wish to include can enable a reader to more fully understand the LEA's LCAP.
- LEAs may also provide information about their strategic plan, vision, etc.
- As part of this response, identify all schools within the LEA receiving Equity Multiplier funding.

Reflections: Annual Performance

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

Reflect on the LEA's annual performance on the Dashboard and local data. This may include both successes and challenges identified by the LEA during the development process.

LEAs are encouraged to highlight how they are addressing the identified needs of student groups, and/or schools within the LCAP as part of this response.

As part of this response, the LEA must identify the following, which will remain unchanged during the three-year LCAP cycle:

- Any school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard;
- Any student group within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard; and/or
- Any student group within a school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard.

EC Section 52064.4 requires that an LEA that has unexpended Learning Recovery Emergency Block Grant (LREBG) funds must include one or more actions funded with LREBG funds within the 2026-27, 2026-27 and 2027-28 LCAPs, as applicable to the LEA. To implement the requirements of *EC* Section 52064.4, all LEAs must do the following:

- For the 2025–26, 2026–27, and 2027–28 LCAP years, identify whether or not the LEA has unexpended LREBG funds for the applicable LCAP year.
    - If the LEA has unexpended LREBG funds the LEA must provide the following:
        - The goal and action number for each action that will be funded, either in whole or in part, with LREBG funds; and
        - An explanation of the rationale for selecting each action funded with LREBG funds. This explanation must include:
            - An explanation of how the action is aligned with the allowable uses of funds identified in *EC* Section 32526(c)(2); and
            - An explanation of how the action is expected to address the area(s) of need of students and schools identified in the needs assessment required by *EC* Section 32526(d).
                - For information related to the allowable uses of funds and the required needs assessment, please see the Program Information tab on the LREBG Program Information web page.
            - Actions may be grouped together for purposes of these explanations.
            - The LEA may provide these explanations as part of the action description rather than as part of the Reflections: Annual Performance.
    - If the LEA does not have unexpended LREBG funds, the LEA is not required to conduct the needs assessment required by *EC* Section 32627(d), to provide the information identified above or to include actions funded with LREBG funds within the 2026-27, 2026-27 and 2027-28 LCAPs.

Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

Annually identify the reason(s) the LEA is eligible for or has requested technical assistance consistent with EC sections 47607.3, 52071, 52071.5, 52072, or 52072.5, and provide a summary of the work underway as part of receiving technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance, however this also includes LEAs that have requested technical assistance from their COE.

- If the LEA is not eligible for or receiving technical assistance, the LEA may respond to this prompt as “Not Applicable.”

Comprehensive Support and Improvement

An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

- Identify the schools within the LEA that have been identified for CSI.

Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

- Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.

Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

- Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

Engaging Educational Partners

Purpose

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard, accountability, and improvement across the state priorities and locally identified priorities (EC Section 52064[e][1]). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public to understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

Requirements

Requirements

School districts and COEs: *EC* Section 52060(g) and *EC* Section 52066(g) specify the educational partners that must be consulted when developing the LCAP:

- Teachers,

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- Principals,
- Administrators,
- Other school personnel,
- Local bargaining units of the LEA,
- Parents, and
- Students

A school district or COE receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Before adopting the LCAP, school districts and COEs must share it with the applicable committees, as identified below under Requirements and Instructions. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

Charter schools: *EC* Section 47606.5(d) requires that the following educational partners be consulted with when developing the LCAP:

- Teachers,
- Principals,
- Administrators,
- Other school personnel,
- Parents, and
- Students

A charter school receiving Equity Multiplier funds must also consult with educational partners at the school generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for the school.

The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals. Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the CDE's LCAP webpage.

Before the governing board/body of an LEA considers the adoption of the LCAP, the LEA must meet the following legal requirements:

- For school districts, see *Education Code* Section 52062;
    - **Note:** Charter schools using the LCAP as the School Plan for Student Achievement must meet the requirements of *EC* Section 52062(a).
- For COEs, see *Education Code* Section 52068; and
- For charter schools, see *Education Code* Section 47606.5.

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- **NOTE:** As a reminder, the superintendent of a school district or COE must respond, in writing, to comments received by the applicable committees identified in the *Education Code* sections listed above. This includes the parent advisory committee and may include the English learner parent advisory committee and, as of July 1, 2024, the student advisory committee, as applicable.

Instructions

Respond to the prompts as follows:

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Complete the table as follows:

Educational Partners

Identify the applicable educational partner(s) or group(s) that were engaged in the development of the LCAP.

Process for Engagement

Describe the engagement process used by the LEA to involve the identified educational partner(s) in the development of the LCAP. At a minimum, the LEA must describe how it met its obligation to consult with all statutorily required educational partners, as applicable to the type of LEA.

- A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA's philosophical approach to engaging its educational partners.

- An LEA receiving Equity Multiplier funds must also include a summary of how it consulted with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

Describe any goals, metrics, actions, or budgeted expenditures in the LCAP that were influenced by or developed in response to the educational partner feedback.

- A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP.

- An LEA receiving Equity Multiplier funds must include a description of how the consultation with educational partners at schools generating Equity Multiplier funds influenced the development of the adopted LCAP.

- For the purposes of this prompt, this may also include, but is not necessarily limited to:
  - Inclusion of a goal or decision to pursue a Focus Goal (as described below)
  - Inclusion of metrics other than the statutorily required metrics
  - Determination of the target outcome on one or more metrics
  - Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
  - Inclusion of action(s) or a group of actions
  - Elimination of action(s) or group of actions
  - Changes to the level of proposed expenditures for one or more actions
  - Inclusion of action(s) as contributing to increased or improved services for unduplicated students
  - Analysis of effectiveness of the specific actions to achieve the goal
  - Analysis of material differences in expenditures
  - Analysis of changes made to a goal for the ensuing LCAP year based on the annual update process
  - Analysis of challenges or successes in the implementation of actions

Goals and Actions

Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal must be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs must consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard, in determining whether and how to prioritize its goals within the LCAP. As previously stated, strategic planning that

is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students, and to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- Focus Goal: A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.
    - All Equity Multiplier goals must be developed as focus goals. For additional information, see Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding below.
- Broad Goal: A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.
- Maintenance of Progress Goal: A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

Requirement to Address the LCFF State Priorities

At a minimum, the LCAP must address all LCFF priorities and associated metrics articulated in *EC* sections 52060(d) and 52066(d), as applicable to the LEA. The *LCFF State Priorities Summary* provides a summary of *EC* sections 52060(d) and 52066(d) to aid in the development of the LCAP.

Respond to the following prompts, as applicable:

Focus Goal(s)

Description

The description provided for a Focus Goal must be specific, measurable, and time bound.

- An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach.
- The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

Type of Goal

Identify the type of goal being implemented as a Focus Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain why the LEA has chosen to prioritize this goal.

- An explanation must be based on Dashboard data or other locally collected data.
- LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners.
- LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding

Description

LEAs receiving Equity Multiplier funding must include one or more focus goals for each school generating Equity Multiplier funding. In addition to addressing the focus goal requirements described above, LEAs must adhere to the following requirements.

Focus goals for Equity Multiplier schoolsites must address the following:

(A) All student groups that have the lowest performance level on one or more state indicators on the Dashboard, and

(B) Any underlying issues in the credentialing, subject matter preparation, and retention of the school's educators, if applicable.

- Focus Goals for each and every Equity Multiplier schoolsite must identify specific metrics for each identified student group, as applicable.
- An LEA may create a single goal for multiple Equity Multiplier schoolsites if those schoolsites have the same student group(s) performing at the lowest performance level on one or more state indicators on the Dashboard or, experience similar issues in the credentialing, subject matter preparation, and retention of the school's educators.
    - When creating a single goal for multiple Equity Multiplier schoolsites, the goal must identify the student groups and the performance levels on the Dashboard that the Focus Goal is addressing; or,
    - The common issues the schoolsites are experiencing in credentialing, subject matter preparation, and retention of the school's educators, if applicable.

Type of Goal

Identify the type of goal being implemented as an Equity Multiplier Focus Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain why the LEA has chosen to prioritize this goal.

- An explanation must be based on Dashboard data or other locally collected data.
- LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners.
- LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.
- In addition to this information, the LEA must also identify:
    - The school or schools to which the goal applies

LEAs are encouraged to approach an Equity Multiplier goal from a wholistic standpoint, considering how the goal might maximize student outcomes through the use of LCFF and other funding in addition to Equity Multiplier funds.

- Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the Expanded Learning Opportunities Program (ELO-P), the Literacy Coaches and Reading Specialists (LCRS) Grant Program, and/or the California Community Schools Partnership Program (CCSPP).
- This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.

Note: *EC* Section 42238.024(b)(1) requires that Equity Multiplier funds be used for the provision of evidence-based services and supports for students. Evidence-based services and supports are based on objective evidence that has informed the design of the service or support and/or guides the modification of those services and supports. Evidence-based supports and strategies are most commonly based on educational research and/or metrics of LEA, school, and/or student performance.

Broad Goal

Description

Describe what the LEA plans to achieve through the actions included in the goal.

- The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal.

- The goal description organizes the actions and expected outcomes in a cohesive and consistent manner.
- A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

Type of Goal

Identify the type of goal being implemented as a Broad Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

Maintenance of Progress Goal

Description

Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP.

- Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP.
- The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

Type of Goal

Identify the type of goal being implemented as a Maintenance of Progress Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain how the actions will sustain the progress exemplified by the related metrics.

Measuring and Reporting Results:

For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes.

- LEAs must identify metrics for specific student groups, as appropriate, including expected outcomes that address and reduce disparities in outcomes between student groups.

- The metrics may be quantitative or qualitative; but at minimum, an LEA's LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year, as applicable to the type of LEA.

- To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant local indicator self-reflection tools within the Dashboard.

- **Required metrics for LEA-wide actions:** For each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.

    - These required metrics may be identified within the action description or the first prompt in the increased or improved services section, however the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.

- **Required metrics for Equity Multiplier goals**: For each Equity Multiplier goal, the LEA must identify:

    - The specific metrics for each identified student group at each specific schoolsite, as applicable, to measure the progress toward the goal, and/or

    - The specific metrics used to measure progress in meeting the goal related to credentialing, subject matter preparation, or educator retention at each specific schoolsite.

- **Required metrics for actions supported by LREBG funds**: To implement the requirements of *EC* Section 52064.4, LEAs with unexpended LREBG funds must include at least one metric to monitor the impact of each action funded with LREBG funds included in the goal.

    - The metrics being used to monitor the impact of each action funded with LREBG funds are not required to be new metrics; they may be metrics that are already being used to measure progress towards goals and actions included in the LCAP.

Complete the table as follows:

Metric #

- Enter the metric number.

Metric

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- Identify the standard of measure being used to determine progress towards the goal and/or to measure the effectiveness of one or more actions associated with the goal.

Baseline

- Enter the baseline when completing the LCAP for 2024–25.
    - Use the most recent data associated with the metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2023 Dashboard for the baseline of a metric only if that data represents the most recent available data (e.g., high school graduation rate).
    - Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS.
    - Indicate the school year to which the baseline data applies.
    - The baseline data must remain unchanged throughout the three-year LCAP.
        - This requirement is not intended to prevent LEAs from revising the baseline data if it is necessary to do so. For example, if an LEA identifies that its data collection practices for a particular metric are leading to inaccurate data and revises its practice to obtain accurate data, it would also be appropriate for the LEA to revise the baseline data to align with the more accurate data process and report its results using the accurate data.
        - If an LEA chooses to revise its baseline data, then, at a minimum, it must clearly identify the change as part of its response to the description of changes prompt in the Goal Analysis for the goal. LEAs are also strongly encouraged to involve their educational partners in the decision of whether or not to revise a baseline and to communicate the proposed change to their educational partners.
    - Note for Charter Schools: Charter schools developing a one- or two-year LCAP may identify a new baseline each year, as applicable.

Year 1 Outcome

- When completing the LCAP for 2025–26, enter the most recent data available. Indicate the school year to which the data applies.
    - Note for Charter Schools: Charter schools developing a one-year LCAP may provide the Year 1 Outcome when completing the LCAP for both 2025–26 and 2026–27 or may provide the Year 1 Outcome for 2025–26 and provide the Year 2 Outcome for 2026–27.

Year 2 Outcome

- When completing the LCAP for 2026–27, enter the most recent data available. Indicate the school year to which the data applies.

- Note for Charter Schools: Charter schools developing a one-year LCAP may identify the Year 2 Outcome as not applicable when completing the LCAP for 2026–27 or may provide the Year 2 Outcome for 2026–27.

Target for Year 3 Outcome

- When completing the first year of the LCAP, enter the target outcome for the relevant metric the LEA expects to achieve by the end of the three-year LCAP cycle.
    - Note for Charter Schools: Charter schools developing a one- or two-year LCAP may identify a Target for Year 1 or Target for Year 2, as applicable.

Current Difference from Baseline

- When completing the LCAP for 2025–26 and 2026–27, enter the current difference between the baseline and the yearly outcome, as applicable.
    - Note for Charter Schools: Charter schools developing a one- or two-year LCAP will identify the current difference between the baseline and the yearly outcome for Year 1 and/or the current difference between the baseline and the yearly outcome for Year 2, as applicable.

Timeline for school districts and COEs for completing the "**Measuring and Reporting Results**" part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
Enter information in this box when completing the LCAP for **2024–25** or when adding a new metric.	Enter information in this box when completing the LCAP for **2024–25** or when adding a new metric.	Enter information in this box when completing the LCAP for **2025–26**. Leave blank until then.	Enter information in this box when completing the LCAP for **2026–27**. Leave blank until then.	Enter information in this box when completing the LCAP for **2024–25** or when adding a new metric.	Enter information in this box when completing the LCAP for **2025–26** and **2026–27**. Leave blank until then.

Goal Analysis:

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective towards achieving the goal. "Effective" means the degree to which the planned actions were successful in producing the target result. Respond to the prompts as instructed.

Note: When completing the 2024–25 LCAP, use the 2023–24 Local Control and Accountability Plan Annual Update template to complete the Goal Analysis and identify the Goal Analysis prompts in the 2024–25 LCAP as "Not Applicable."

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

- Describe the overall implementation of the actions to achieve the articulated goal, including relevant challenges and successes experienced with implementation.
    - Include a discussion of relevant challenges and successes experienced with the implementation process.
    - This discussion must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

- Describe the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal. “Effectiveness” means the degree to which the actions were successful in producing the target result and “ineffectiveness” means that the actions did not produce any significant or targeted result.
    - In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal.
    - When responding to this prompt, LEAs may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.
    - Beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.
    - As noted above, beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period. For actions that have been identified as ineffective, the LEA must identify the ineffective action and must include a description of the following:

- The reasons for the ineffectiveness, and
- How changes to the action will result in a new or strengthened approach.

Actions:

Complete the table as follows. Add additional rows as necessary.

Action #

- Enter the action number.

Title

- Provide a short title for the action. This title will also appear in the action tables.

Description

- Provide a brief description of the action.
    - For actions that contribute to meeting the increased or improved services requirement, the LEA may include an explanation of how each action is principally directed towards and effective in meeting the LEA's goals for unduplicated students, as described in the instructions for the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.
    - As previously noted, for each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.
    - These required metrics may be identified within the action description or the first prompt in the increased or improved services section; however, the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.

Total Funds

- Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the action tables.

Contributing

- Indicate whether the action contributes to meeting the increased or improved services requirement as described in the Increased or Improved Services section using a “Y” for Yes or an “N” for No.
    - **Note:** for each such contributing action, the LEA will need to provide additional information in the Increased or Improved Services section to address the requirements in *California Code of Regulations*, Title 5 [5 *CCR*] Section 15496 in the Increased or Improved Services section of the LCAP.

Actions for Foster Youth: School districts, COEs, and charter schools that have a numerically significant foster youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to foster youth students.

Required Actions

For English Learners and Long-Term English Learners

- LEAs with 30 or more English learners and/or 15 or more long-term English learners must include specific actions in the LCAP related to, at a minimum:
    - Language acquisition programs, as defined in *EC* Section 306, provided to students, and
    - Professional development for teachers.
    - If an LEA has both 30 or more English learners and 15 or more long-term English learners, the LEA must include actions for both English learners and long-term English learners.

For Technical Assistance

- LEAs eligible for technical assistance pursuant to *EC* sections 47607.3, 52071, 52071.5, 52072, or 52072.5, must include specific actions within the LCAP related to its implementation of the work underway as part of technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance.

For Lowest Performing Dashboard Indicators

- LEAs that have Red Dashboard indicators for (1) a school within the LEA, (2) a student group within the LEA, and/or (3) a student group within any school within the LEA must include one or more specific actions within the LCAP:
    - The specific action(s) must be directed towards the identified student group(s) and/or school(s) and must address the identified state indicator(s) for which the student group or school received the lowest performance level on the 2023 Dashboard. Each student group and/or school that receives the lowest performance level on the 2023 Dashboard must be addressed by one or more actions.
    - These required actions will be effective for the three-year LCAP cycle.

For LEAs With Unexpended LREBG Funds

- To implement the requirements of *EC* Section 52064.4, LEAs with unexpended LREBG funds must include one or more actions supported with LREBG funds within the 2025–26, 2026–27, and 2027–28 LCAPs, as applicable to the LEA. Actions funded with LREBG funds must remain in the LCAP until the LEA has expended the remainder of its LREBG funds, after which time the actions may be removed from the LCAP.
    - Prior to identifying the actions included in the LCAP the LEA is required to conduct a needs assessment pursuant to *EC* Section 32526(d). For information related to the required needs assessment please see the Program Information tab on the LREBG

Program Information web page. Additional information about the needs assessment and evidence-based resources for the LREBG may be found on the California Statewide System of Support LREBG Resources web page. The required LREBG needs assessment may be part of the LEAs regular needs assessment for the LCAP if it meets the requirements of *EC* Section 32627(d).

- School districts receiving technical assistance and COEs providing technical assistance are encouraged to use the technical assistance process to support the school district in conducting the required needs assessment, the selection of actions funded by the LREBG and/or the evaluation of implementation of the actions required as part of the LCAP annual update process.
- As a reminder, LREBG funds must be used to implement one or more of the purposes articulated in *EC* Section 32526(c)(2).
- LEAs with unexpended LREBG funds must include one or more actions supported by LREBG funds within the LCAP. For each action supported by LREBG funding the action description must:
  - Identify the action as an LREBG action;
  - Include an explanation of how research supports the selected action;
  - Identify the metric(s) being used to monitor the impact of the action; and
  - Identify the amount of LREBG funds being used to support the action.

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students as defined in *EC* Section 42238.02 in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA's description in this section must align with the actions included in the Goals and Actions section as contributing.

Please Note: For the purpose of meeting the Increased or Improved Services requirement and consistent with *EC* Section 42238.02, long-term English learners are included in the English learner student group.

Statutory Requirements

An LEA is required to demonstrate in its LCAP how it is increasing or improving services for its students who are foster youth, English learners, and/or low-income, collectively referred to as unduplicated students, as compared to the services provided to all students in proportion to the increase in funding it receives based on the number and concentration of unduplicated students in the LEA (*EC* Section 42238.07[a][1], *EC*

Section 52064[b][8][B]; 5 *CCR* Section 15496[a]). This proportionality percentage is also known as the "minimum proportionality percentage" or "MPP." The manner in which an LEA demonstrates it is meeting its MPP is two-fold: (1) through the expenditure of LCFF funds or through the identification of a Planned Percentage of Improved Services as documented in the Contributing Actions Table, and (2) through the explanations provided in the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.

To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are identified in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided across the entire LEA (LEA-wide action), provided to an entire school (Schoolwide action), or solely provided to one or more unduplicated student group(s) (Limited action).

Therefore, for *any* action contributing to meet the increased or improved services requirement, the LEA must include an explanation of:

- How the action is increasing or improving services for the unduplicated student group(s) (Identified Needs and Action Design), and
- How the action meets the LEA's goals for its unduplicated pupils in the state and any local priority areas (Measurement of Effectiveness).

LEA-wide and Schoolwide Actions

In addition to the above required explanations, LEAs must provide a justification for why an LEA-wide or Schoolwide action is being provided to all students and how the action is intended to improve outcomes for unduplicated student group(s) as compared to all students.

- Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient.

- Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increased or improved services standard because enrolling students is not the same as serving students.

For School Districts Only

Actions provided on an **LEA-wide** basis at **school districts with an unduplicated pupil percentage of less than 55 percent** must also include a description of how the actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Actions provided on a **Schoolwide** basis for **schools with less than 40 percent enrollment of unduplicated pupils** must also include a description of how these actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Requirements and Instructions

Complete the tables as follows:

Total Projected LCFF Supplemental and/or Concentration Grants

- Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of foster youth, English learner, and low-income students. This amount includes the Additional 15 percent LCFF Concentration Grant.

Projected Additional 15 percent LCFF Concentration Grant

- Specify the amount of additional LCFF concentration grant add-on funding, as described in *EC* Section 42238.02, that the LEA estimates it will receive in the coming year.

Projected Percentage to Increase or Improve Services for the Coming School Year

- Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 *CCR* Section 15496(a)(7).

LCFF Carryover — Percentage

- Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

LCFF Carryover — Dollar

- Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero ($0).

Total Percentage to Increase or Improve Services for the Coming School Year

- Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEA's percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 *CCR* Section 15496(a)(7).

Required Descriptions:

LEA-wide and Schoolwide Actions

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

If the LEA has provided this required description in the Action Descriptions, state as such within the table.

Complete the table as follows:

Identified Need(s)

Provide an explanation of the unique identified need(s) of the LEA's unduplicated student group(s) for whom the action is principally directed.

An LEA demonstrates how an action is principally directed towards an unduplicated student group(s) when the LEA explains the need(s), condition(s), or circumstance(s) of the unduplicated student group(s) identified through a needs assessment and how the action addresses them. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

How the Action(s) are Designed to Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis

Provide an explanation of how the action as designed will address the unique identified need(s) of the LEA's unduplicated student group(s) for whom the action is principally directed and the rationale for why the action is being provided on an LEA-wide or schoolwide basis.

- As stated above, conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient.
- Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increased or improved services standard because enrolling students is not the same as serving students.

Metric(s) to Monitor Effectiveness

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

Note for COEs and Charter Schools: In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

Limited Actions

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

If the LEA has provided the required descriptions in the Action Descriptions, state as such.

Complete the table as follows:

Identified Need(s)

Provide an explanation of the unique need(s) of the unduplicated student group(s) being served identified through the LEA's needs assessment. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

How the Action(s) are Designed to Address Need(s)

Provide an explanation of how the action is designed to address the unique identified need(s) of the unduplicated student group(s) being served.

Metric(s) to Monitor Effectiveness

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

For any limited action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage, as applicable.

- For each action with an identified Planned Percentage of Improved Services, identify the goal and action number and describe the methodology that was used.

- When identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

- For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which, based on the LEA's current pay scale, the LEA estimates would cost $165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of $165,000 by the amount of LCFF Funding identified in the Total Planned Expenditures Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

Additional Concentration Grant Funding

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

An LEA that receives the additional concentration grant add-on described in *EC* Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

- An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.

- Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.

- An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as a single-school LEA or an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.

- In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA.

    - The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA.

    - The staff-to-student ratio must be based on the number of full-time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.

- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA.

    - The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA.

    - The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

Action Tables

Complete the Total Planned Expenditures Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Total Planned Expenditures Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. The word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)
- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2024–25 LCAP, 2024–25 will be the coming LCAP Year and 2023–24 will be the current LCAP Year.

Total Planned Expenditures Table

In the Total Planned Expenditures Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year**: Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant**: Provide the total amount estimated LCFF entitlement for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program, the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 *CCR* Section 15496(a)(8). Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs.

  See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.
- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 *CCR* Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.
- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover —

Percentage. ***This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.***

- **Goal #**: Enter the LCAP Goal number for the action.
- **Action #**: Enter the action's number as indicated in the LCAP Goal.
- **Action Title**: Provide a title of the action.
- **Student Group(s)**: Indicate the student group or groups who will be the primary beneficiary of the action by entering "All," or by entering a specific student group or groups.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services requirement; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services requirement.
- If "Yes" is entered into the Contributing column, then complete the following columns:
    - **Scope**: The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.
    - **Unduplicated Student Group(s)**: Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
    - **Location**: Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate "All Schools." If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter "Specific Schools" or "Specific Grade Spans." Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.
- **Time Span**: Enter "ongoing" if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter "1 Year," or "2 Years," or "6 Months."
- **Total Personnel**: Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel**: This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.

- **LCFF Funds**: Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA's total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
    - **Note:** For an action to contribute towards meeting the increased or improved services requirement, it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds**: Enter the total amount of Other State Funds utilized to implement this action, if any.
    - **Note:** Equity Multiplier funds must be included in the "Other State Funds" category, not in the "LCFF Funds" category. As a reminder, Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the ELO-P, the LCRS, and/or the CCSPP. This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LEA's LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.
- **Local Funds**: Enter the total amount of Local Funds utilized to implement this action, if any.
- **Federal Funds**: Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds**: This amount is automatically calculated based on amounts entered in the previous four columns.
- **Planned Percentage of Improved Services**: For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.
    - As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

      For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which, based on the LEA's current pay scale, the LEA estimates would cost $165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of $165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the 'Contributing to Increased or Improved Services?' column will need to be checked to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses.

Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures**: Enter the total estimated actual expenditures to implement this action, if any.

Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the 'Contributing to Increased or Improved Services?' column to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated based on the number and concentration of unduplicated students in the current school year.
- **Estimated Actual Expenditures for Contributing Actions**: Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.
- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).
    - Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been $169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of $169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant**: Provide the total amount of estimated LCFF Target Entitlement for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program,

the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 *CCR* Section 15496(a)(8). Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs. See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.

- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 *CCR* Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

Contributing Actions Table

- **4. Total Planned Contributing Expenditures (LCFF Funds)**
    - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column.
- **5. Total Planned Percentage of Improved Services**
    - This percentage is the total of the Planned Percentage of Improved Services column.
- **Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)**
    - This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

Contributing Actions Annual Update Table

Pursuant to *EC* Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- **6. Estimated Actual LCFF Supplemental and Concentration Grants**

- This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on the number and concentration of unduplicated students in the current school year.

- **4. Total Planned Contributing Expenditures (LCFF Funds)**
  - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds).
- **7. Total Estimated Actual Expenditures for Contributing Actions**
  - This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds).
- **Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)**
  - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4).
- **5. Total Planned Percentage of Improved Services (%)**
  - This amount is the total of the Planned Percentage of Improved Services column.
- **8. Total Estimated Actual Percentage of Improved Services (%)**
  - This amount is the total of the Estimated Actual Percentage of Improved Services column.
- **Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)**
  - This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8).

LCFF Carryover Table

- **10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 plus Carryover %)**
  - This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.
- **11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)**
  - This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).
- **12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)**

- If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

  The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.

- **13. LCFF Carryover — Percentage (12 divided by 9)**

  - This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education
November 2024

Local Control and Accountability Plan (LCAP)
Every Student Succeeds Act (ESSA)
Federal Addendum Template

School Year
2026-27

Date of Board Approval
6/18/2026

LEA Name
Sage Oak Charter School- Keppel

CDS Code:
19-64642-0136127

Link to the LCAP:
(optional)

For which ESSA programs apply to your LEA?

Choose From:

TITLE I, PART A
Improving Basic Programs Operated by State and Local Educational Agencies

TITLE II, PART A
Supporting Effective Instruction

TITLE IV, PART A
Student Support and Academic Enrichment Grants

*(**note:** This list only includes ESSA programs with LEA plan requirements; not all ESSA programs.)*

In the following pages, ONLY complete the sections for the corresponding programs.

Instructions

The LCAP Federal Addendum is meant to supplement the LCAP to ensure that eligible LEAs have the opportunity to meet the Local Educational Agency (LEA) Plan provisions of the ESSA.

The LCAP Federal Addendum Template must be completed and submitted to the California Department of Education (CDE) to apply for ESSA funding**.** LEAs are encouraged to review the LCAP Federal Addendum annually with their LCAP, as ESSA funding should be considered in yearly strategic planning.

The LEA must address the Strategy and Alignment prompts provided on the following page.

Each provision for each program must be addressed unless the provision is not applicable to the LEA.

In addressing these provisions, LEAs must provide a narrative that addresses the provision **within the LCAP Federal Addendum Template.**

Under State Priority Alignment, state priority numbers are provided to demonstrate where an ESSA provision aligns with state priorities. This is meant to assist LEAs in determining where ESSA provisions may already be addressed in the LEA's LCAP, as it demonstrates the LEA's efforts to support the state priorities.

The CDE emphasizes that **the LCAP Federal Addendum should not drive LCAP development.** ESSA funds are supplemental to state funds, just as the LCAP Federal Addendum supplements your LCAP. **LEAs are encouraged to integrate their ESSA funds into their LCAP development as much as possible to promote strategic planning of all resources**; however, this is not a requirement. In reviewing the LCAP Federal Addendum, staff will evaluate the LEA's responses to the ESSA plan provisions. There is no standard length for the responses. LEAs will be asked to clarify insufficient responses during the review process.

This template is designed to be used by LEAs who already have completed their LCAP Federal Addendum and received approval from CDE. This template will support LEAs with the review of their LCAP Federal Addendum and revision.

The review and revision of the LCAP Federal Addendum do not need to be submitted to CDE for approval. However, an LEA should have their local Board approve any revisions.

Even if the LEA plans to transfer all of its title funds, it must still address all of the provisions of the title from which it is transferring its funds. The LEA must first meet the application requirements of those funds before it can elect to transfer those funds to another title.

California's ESSA State Plan significantly shifts the state's approach to the utilization of federal resources in support of underserved student groups. This LCAP Federal Addendum provides LEAs with the opportunity to document their approach to maximizing the impact of federal investments in support of underserved students.

The implementation of ESSA in California presents an opportunity for LEAs to innovate with their federally-funded programs and align them with the priority goals they are realizing under the state's Local Control Funding Formula (LCFF).

LCFF provides LEAs flexibility to design programs and provide services that meet the needs of students in order to achieve readiness for college, career, and lifelong learning. The LCAP planning process supports continuous cycles of action, reflection, and improvement.

Please respond to the prompts below, and in the pages that follow, to describe the LEA's plan for making the best use of federal ESEA resources in alignment with other federal, state, and local programs as described in the LEA's LCAP.

Strategy

Explain the LEA's strategy for using federal funds to supplement and enhance local priorities or initiatives funded with state funds, as reflected in the LEA's LCAP. This shall include describing the rationale/evidence for the selected use(s) of federal funds within the context of the LEA's broader strategy reflected in the LCAP.

Sage Oak Charter School strategically utilizes federal funds to supplement and enhance local priorities and initiatives funded with state funds, as detailed in our Local Control and Accountability Plan (LCAP). This strategic allocation ensures that federal resources are effectively supporting specific goals within our school community, aligning closely with our broader educational objectives.

Federal funds under Title I, Part A are targeted toward Goal 1 actions aimed at enhancing College and Career Readiness programs. These funds specifically support socioeconomically disadvantaged students by enhancing academic interventions and providing resources that facilitate both college and career readiness. For Goal 2, Title II, Part A funds are allocated to augment professional development programs, including extensive training for educators on differentiated instruction and effective strategies to engage students with diverse learning needs. This ensures that our teaching staff can implement the educational strategies identified in the LCAP effectively. Additionally, under Goal 3, Title IV, Part A funds align with the focus on leveraging technologies to enhance personalized learning pathways. These funds support the integration of advanced technological tools and programs that support a well-rounded education, including enhancing STEM education, supporting arts programs, and providing comprehensive mental health services.

The rationale behind these specific allocations of federal funds is supported by research that shows targeted interventions in areas such as reading and math can close achievement gaps, particularly for low-income students. Studies consistently indicate a strong correlation between teacher qualifications, their ongoing professional development, and student success. This underscores the necessity of equipping teachers with advanced skills and knowledge. Furthermore, engagement in arts and STEM has been linked to higher academic performance and motivation, while robust mental health support is essential for overall student success and well-being.

By ensuring that federal funds are aligned with the specific goals and actions outlined in our LCAP, Sage Oak Charter School maximizes the impact of these resources. This approach not only meets federal and state compliance requirements but also significantly advances our mission to provide a high-quality, equitable, and comprehensive education to all students, fostering both academic excellence and personal growth.

Alignment

Describe the efforts that the LEA will take to align use of federal funds with activities funded by state and local funds and, as applicable, across different federal grant programs.

Sage Oak Charter School ensures the effective alignment of federal funds with activities funded by state and local funds, and where applicable, across different federal grant programs, through a series of strategic efforts:

We engage in an integrated planning and budgeting process that includes stakeholders from all levels of the organization. This collaborative approach ensures that all sources of funding—federal, state, and local—are considered collectively to create a unified resource allocation strategy. This integrated planning is crucial for aligning the objectives across different funding streams and maximizing the impact of each dollar spent.

In addition, we coordinate activities across different federal grant programs, such as Title I, Title II, and Title IV, to leverage synergies and amplify the effects of these funds. By identifying overlapping goals and complementary activities, resources from these programs can be pooled to support broader educational initiatives, enhancing the cohesion and effectiveness of our efforts.

Our decision-making process is strongly data-driven, relying on regular data collection and analysis to assess the effectiveness of funded programs and to adjust strategies as necessary. This allows us to align federal funds closely with

the specific needs identified through state and local assessments, ensuring resources are targeted to areas of greatest need.

Stakeholder engagement is also a cornerstone of our approach. By involving a wide range of stakeholders, including parents, teachers, and community members, in the funding decision-making process, we ensure that the allocation of resources reflects the priorities and needs of our school community, thereby increasing the relevance and impact of the funded programs.

Lastly, continuous monitoring and regular reporting on the use and impact of funds ensure transparency and accountability. This not only helps in making necessary adjustments to align the use of federal, state, and local funds effectively but also ensures that activities across different federal grant programs are well-coordinated and directed toward our common educational goals.

Through these efforts, Sage Oak Charter School fosters a strategic and effective use of all funding sources, ensuring that federal funds not only meet regulatory requirements but also significantly enhance our educational initiatives funded by state and local revenues. This strategic alignment supports our overarching goal of providing high-quality, equitable, and comprehensive education to all students

ESSA Provisions Addressed Within the LCAP

Within the LCAP an LEA is required to describe its goals and the specific actions to achieve those goals, for each of the LCFF state priorities. In an approvable LCAP, it will be apparent from the descriptions of the goals, actions, and services how an LEA is acting to address the following ESSA provisions through the aligned LCFF state priorities and/or the state accountability system.

TITLE I, PART A

Monitoring Student Progress Towards Meeting Challenging State Academic Standards

ESSA SECTION	STATE PRIORITY ALIGNMENT
1112(b)(1) (A–D)	1, 2, 4, 7, 8 *(as applicable)*

Describe how the LEA will monitor students' progress in meeting the challenging state academic standards by:

(A) developing and implementing a well-rounded program of instruction to meet the academic needs of all students;
(B) identifying students who may be at risk for academic failure;
(C) providing additional educational assistance to individual students the LEA or school determines need help in meeting the challenging State academic standards; and
(D) identifying and implementing instructional and other strategies intended to strengthen academic programs and improve school conditions for student learning.

Overuse in Discipline Practices that Remove Students from the Classroom

ESSA SECTION	STATE PRIORITY ALIGNMENT
1112(b)(11)	6 *(as applicable)*

Describe how the LEA will support efforts to reduce the overuse of discipline practices that remove students from the classroom, which may include identifying and supporting schools with high rates of discipline, disaggregated by each of the student groups, as defined in Section 1111(c)(2).

Career Technical and Work-based Opportunities

ESSA SECTION	STATE PRIORITY ALIGNMENT
1112(b)(12)(A–B)	2, 4, 7 *(as applicable)*

If determined appropriate by the LEA, describe how such agency will support programs that coordinate and integrate:

(A) academic and career and technical education content through coordinated instructional strategies, that may incorporate experiential learning opportunities and promote skills attainment important to in-demand occupations or industries in the State; and
(B) work-based learning opportunities that provide students in-depth interaction with industry professionals and, if appropriate, academic credit.

TITLE II, PART A

Title II, Part A Activities

ESSA SECTION	STATE PRIORITY ALIGNMENT
2102(b)(2)(A)	1, 2, 4 *(as applicable)*

Provide a description of the activities to be carried out by the LEA under this Section and how these activities will be aligned with challenging State academic standards.

TITLE III, PART A

Parent, Family, and Community Engagement

ESSA SECTION	STATE PRIORITY ALIGNMENT
3116(b)(3)	3, 6 *(as applicable)*

Describe how the eligible entity will promote parent, family, and community engagement in the education of English learners.

ESSA Provisions Addressed in the Consolidated Application and Reporting System

An LEA addresses the following ESSA provision as part of completing annual reporting through the Consolidated Application and Reporting System (CARS).

TITLE I, PART A

Poverty Criteria

ESSA SECTION(S)	STATE PRIORITY ALIGNMENT
1112(b)(4)	N/A

Describe the poverty criteria that will be used to select school attendance areas under Section 1113.

Sage Oak utilizes specific poverty criteria under Section 1113, in compliance with the Every Student Succeeds Act (ESSA) provisions detailed in Title I, Part A. This process is part of our annual reporting through the Consolidated Application and Reporting System (CARS), ensuring transparency and adherence to federal guidelines.

As a nonclasroom-based charter school, we operate as a single LEA. We use the percentage of students eligible for the Household Data Collection (HDC) as our primary poverty criterion. Additionally, we consider other socio-economic indicators such as parental income levels. By combining these data points, Sage Oak can more accurately identify student groups that require additional support, allowing for more targeted resource allocation. This method provides a comprehensive measure of socio-economic disadvantage within our community.

This approach not only helps in directing resources to improve educational equity but also aligns with our broader commitment to providing supportive educational environments for all students, particularly those facing economic challenges. Through careful and systematic analysis of poverty indicators, Sage Oak ensures that federal funding is utilized effectively to enhance educational opportunities and outcomes for our most disadvantaged populations.

ESSA Provisions Not Addressed in the LCAP

For the majority of LEAs, the ESSA provisions on the following pages do not align with state priorities. **Each provision for each program provided on the following pages must be addressed** unless the provision is not applicable to the LEA. In addressing these provisions, LEAs must provide a narrative that addresses the provision **within this addendum**.

As previously stated, the CDE emphasizes that the LCAP Federal Addendum should not drive LCAP development. ESSA funds are supplemental to state funds, just as the LCAP Federal Addendum supplements your LCAP. **LEAs are encouraged to integrate their ESSA funds into their LCAP** development as much as possible to promote strategic planning of all resources; however, this is not a requirement. In reviewing the LCAP Federal Addendum, staff will evaluate the LEA's responses to the ESSA plan provisions. There is no standard length for the responses. LEAs will be asked to clarify insufficient responses during the review process.

TITLE I, PART A

Educator Equity

ESSA SECTION 1112(b)(2) – *Not Applicable to Charters and Single School Districts.*

Describe how the LEA will identify and address, as required under State plans as described in Section 1111(g)(1)(B), any disparities that result in low-income students and minority students being taught at higher rates than other students by ineffective, inexperienced, or out-of-field teachers.

NOTE: In this section, LEAs must identify and address disparities. Tools on the CDEs website (https://www.cde.ca.gov/pd/ee/peat.asp) can help with this process. LEAs are required to specifically address the following at comparable sites:

1. What # and % of teachers at sites are inexperienced, misassigned, or out-of-field in relation to:
    a. Number of low-income students
    b. Number of minority students
2. Does the LEA have an educator equity gap –
    a. If yes, must create a plan which must include root cause analysis of the disparity
    b. A plan must be created with meaningful educational partner engagement.

Educator Equity Data Tables available here:

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THIS ESSA PROVISION IS ADDRESSED BELOW:

N/A

On November 6, 2019, the SBE approved updated definitions for "ineffective" and "out-of-field" teachers to be included in the amended California ESSA Consolidated State Plan.

Term	Definition
Ineffective teacher	An ineffective teacher is any of the following: • An individual whose assignment is legally authorized by an emergency permit that does not require possession of a full teaching license; or • A teacher who holds a teaching credential but does not possess a permit or authorization that temporarily allows them to teach outside of their credentialed area (misassigned)

	• An individual who holds no credential, permit, or authorization to teach in California. Under this definition, teachers with the following limited emergency permits would be considered ineffective: • **Provisional Internship Permits,** • **Short-Term Staff Permits** • **Variable Term Waivers** **Substitute permits or Teaching Permits for Statutory Leave (TSPL) holders serving as the teacher of record**
Out-of-field teacher	A credentialed out-of-field teacher is: A credentialed teacher who has not yet demonstrated subject matter competence in the subject area(s) or for the student population to which he or she is assigned. Under this definition, the following limited permits will be considered out of the field: • General Education Limited Assignment Permit (GELAP) • Special Education Limited Assignment Permit (SELAP) • **Short-Term Waivers** • **Emergency English Learner or Bilingual Authorization Permits** **Local Assignment Options** (except for those made pursuant to the *California Code of Regulations*, Title 5, Section 80005[b])
Inexperienced Teacher	A teacher who has two or fewer years of teaching experience.
Minority Student	A student who is American Indian/Alaska Native, Asian, African American, Filipino, Native Hawaiian/Pacific Islander, Hispanic, or Two or More Races Not Hispanic.
Low-Income Student	A student who is eligible to receive Free or Reduced-Price Meals

Parent and Family Engagement

ESSA SECTIONS 1112(b)(3) and 1112(b)(7)

Describe the strategy the LEA will use to implement effective parent and family engagement under Section 1116.

Sage Oak implements effective parent and family engagement through strategic communication and collaborative initiatives under Section 1116. We have established a comprehensive engagement policy, developed with direct input from parents, ensuring that strategies are aligned with the needs and expectations of our school community. This policy guides our efforts to provide parents with clear, accessible information about academic standards, assessments, and student progress, empowering them to support their children's education effectively.

Our approach includes providing resources to help parents understand curriculum demands and enhance their ability to assist with learning activities. We also educate our staff on the importance of parental involvement, training them to engage with families as equal partners in education. Through regular updates and transparent communication, we keep parents informed and involved in school activities, decision-making processes, and the development of support plans for students.

Additionally, Sage Oak integrates parent and family engagement strategies with other federal, state, and local programs to enhance the educational support network available to our students.

To meet this requirement, LEAs must provide a description of the following:

ESSA Section 1112(b)(3): how the LEA will carry out its responsibilities under paragraphs (1) and (2) of Section 1111(d);

1. How the LEA will involve parents and family members at identified schools in jointly developing Comprehensive Support and Improvement plans
2. How the LEA will involve parents and family members in identified schools in jointly developing the Targeted Support and Improvement plans
3. In the absence of the identification of any schools for Comprehensive Support and Improvement (CSI) or any schools for Targeted Assistance and Intervention (TSI), the LEA may write N/A. This provision will not be reviewed.

ESSA Section 1112(b)(7): the strategy the LEA will use to implement effective parent and family engagement under Section 1116; shall include how the LEA and its schools will build capacity for parent and family engagement by:

1. Describe the LEA parent and family engagement policy, and how it was developed jointly with, agree on with, and distribute to, parents and family members of participating children a written parent and family engagement policy (ESSA Section 1116(a)).
2. Describe how the LEA will provide assistance to parents of children served by the school or local educational agency, as appropriate, in understanding such topics as the challenging State academic standards, State and local academic assessments, the requirements of this part, and how to monitor a child's progress and work with educators to improve the achievement of their children; (ESSA Section 1116(e)(1))
3. Describe how the LEA will provide materials and training to help parents to work with their children to improve their children's achievement, such as literacy training and using technology (including education about the harms of copyright piracy), as appropriate, to foster parental involvement; (ESSA Section 1116(e)(2))
4. Describe how the LEA will educate teachers, specialized instructional support personnel, principals, other school leaders, and other staff, with the assistance of parents, in the value and utility of contributions of parents, and in how to reach out to, communicate with, and work with parents as equal partners, implement and coordinate parent programs, and build ties between parents and the school; (ESSA Section 1116(e)(3))
5. Describe how the LEA will to the extent feasible and appropriate, coordinate and integrate parent involvement programs and activities with other Federal, State, and local programs, including public preschool programs, and conduct other activities, such as parent resource centers, that encourage and support parents in more fully participating in the education of their children; (ESSA Section 1116(e)(4))
6. Describe how the LEA will ensure that information related to school and parent programs, meetings, and other activities is sent to the parents of participating children in a format and, to the extent practicable, in a language the parents can understand (ESSA Section 1116(e)(5))
7. Describe how the LEA will provide such other reasonable support for parental involvement activities as parents may request (ESSA Section 1116(e)(14).
8. Describe how the LEA will provide opportunities for the informed participation of parents and family members (including parents and family members who have limited English proficiency, parents and family members with disabilities, and parents and family members of migratory children), including providing information and school reports in a format and, to the extent practicable, in a language, such parents understand (ESSA Section 1116(f)).

Also, include how the LEA will align parent involvement required in Section 1116 with the LCAP educational partner engagement process.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Sage Oak is dedicated to enhancing engagement through a comprehensive strategy that ensures the active participation of parents and families in their children's education. Our approach aligns with Section 1116 of ESSA, focusing on creating inclusive, supportive, and informative engagement practices that bridge communication gaps between the school and home environments. This alignment is seamlessly integrated with our LCAP educational partner engagement process, ensuring a unified approach to stakeholder involvement.

We have developed a robust parent and family engagement policy in close collaboration with families, ensuring it reflects their needs and perspectives. This policy is approved by the parent advisory committee and distributed annually emphasizing clarity and comprehensibility. To assist parents in understanding the challenging state academic standards, state and local academic assessments, and other educational requirements, we provide informational sessions that are crucial for empowering them to support their children's academic progress effectively.

At Sage Oak, we prioritize making education accessible and engaging. Our staff is trained to value and integrate parental contributions, working with parents as equal partners in the educational process. Our parent involvement programs are coordinated with other federal, state, and local services, enhancing the resources available to our families.

Through regular updates and proactive communication using various platforms—including emails, our website, and social media—we ensure that all families are well-informed and prepared to participate in school activities and decision-making processes. Our engagement strategies are aligned with our LCAP goals, ensuring that parental input is an integral part of our educational planning and evaluation processes.

In aligning these efforts with our LCAP educational partner engagement process, we ensure that parent and family engagement strategies are integral to our broader educational planning. This involves incorporating parent feedback into LCAP development and review, ensuring that our strategic planning reflects the community's voice and needs. By integrating the requirements of Section 1116 into our LCAP process, we enhance the educational experience for all students and foster a supportive community that is deeply involved in our educational mission. This approach is consistent with Sage Oak's educational model, which emphasizes personalized, flexible learning environments that engage and empower our students and their families.

Schoolwide Programs, Targeted Support Programs, and Programs for Neglected or Delinquent Children

ESSA SECTIONS 1112(b)(5) and 1112(b)(9)

Describe, in general, the nature of the programs to be conducted by the LEA’s schools under sections 1114 and 1115 and, where appropriate, educational services outside such schools for children living in local institutions for neglected or delinquent children, and for neglected and delinquent children in community day school programs.

At Sage Oak, we are committed to providing a wide array of programs under sections 1114 and 1115 of ESSA, designed to support and enhance the educational experiences of all students, including those who are neglected or delinquent. These programs are tailored to meet the diverse needs of our student population and are implemented with the goal of ensuring every student has access to high-quality education that prepares them for success in college, career, and life.

Our schoolwide programs focus on comprehensive strategies that improve the entire educational program, making them more responsive to the needs of our students, particularly those who are at risk of failing academic standards. These programs integrate various funding sources to support initiatives such as enhanced instructional methods, integrated technology, and expanded professional development for teachers. The overarching goal is to raise the academic achievement of all students by improving the entire school's instructional and operational effectiveness.

For students specifically identified as needing extra academic support, we have targeted assistance programs. These programs provide supplementary educational services to help raise the academic achievement of students at risk of failing. Services include personalized tutoring, intervention programs in reading and math, credit recovery courses, and additional support services tailored to the needs of individual students. These targeted efforts focus on students who are the furthest from meeting the standards the school sets for all children.

If applicable, for children living in local institutions for the neglected or delinquent, Sage Oak will offer educational services designed to address their unique educational and social-emotional needs. These services will include tailored curricula that focus on core academic subjects, life skills education, and social-emotional learning opportunities. We will collaborate with local agencies and institutions to ensure that these students receive a coordinated approach to support that includes academic tutoring, mentoring, and counseling services.

The implementation of these programs is closely monitored to assess their effectiveness in improving educational outcomes. Adjustments are made based on ongoing evaluations and feedback from students, parents, and educational staff. By aligning these initiatives with our LCAP goals, Sage Oak ensures that federal funds are used strategically to supplement and enhance our state-funded initiatives, thereby providing a cohesive and integrated educational experience for all students.

Describe how teachers and school leaders, in consultation with parents, administrators, paraprofessionals, and specialized instructional support personnel, in schools operating a targeted assistance school program under Section 1115, will identify the eligible children most in need of services under this part.

THIS ESSA PROVISION IS ADDRESSED BELOW:

At Sage Oak Charter School, identifying students most in need of services under the targeted assistance school program outlined in Section 1115 is a collaborative and data-driven process, tailored to our independent study model. This approach involves a broad spectrum of the school community to ensure that the support provided is comprehensively tailored to the individual needs of each student.

The identification process begins with an analysis of academic performance data, including standardized test results, progress in coursework, teacher evaluations, and other relevant assessments. We also consider factors such as engagement levels in learning activities, progress in personalized learning plans, and any social-emotional assessments to ensure a holistic view of each student's needs.

Teachers and school leaders work in consultation with parents, administrators, and specialized instructional support personnel to review and discuss the data collected. This collaborative dialogue is crucial as it helps integrate insights from various perspectives, particularly from parents who provide vital information about their child's learning environment and any external factors influencing their educational experience.

The team prioritizes students based on the urgency and severity of their needs. The criteria for this prioritization include the extent of academic challenges, the potential impact of additional support on the student’s educational outcomes, and the capacity of our resources to effectively address these needs.

This collaborative and data-informed approach ensures that the targeted assistance provided is directly responsive to the most pressing needs of our students. By maintaining regular communication and strategic meetings with all stakeholders involved, Sage Oak sustains a dynamic and adaptable support system that enhances educational outcomes and overall student well-being in a non-classroom based setting.

Homeless Children and Youth Services

ESSA SECTION 1112(b)(6)

Describe the services the LEA will provide homeless children and youths, including services provided with funds reserved under Section 1113(c)(3)(A), to support the enrollment, attendance, and success of homeless children and youths, in coordination with the services the LEA is providing under the McKinney-Vento Homeless Assistance Act (42 United States Code 11301 et seq.).

THIS ESSA PROVISION IS ADDRESSED BELOW:

At Sage Oak, we are committed to supporting the educational needs of homeless children and youth through a comprehensive approach that aligns with the McKinney-Vento Homeless Assistance Act. Our strategy ensures that these students have equal access to educational opportunities and are supported in their enrollment, attendance, and academic success.

To address the challenges faced by homeless students, Sage Oak provides specific services designed to remove barriers to their education. This includes ensuring immediate enrollment even when students do not have access to required documents typically necessary for school entry. We provide assistance with obtaining academic and medical records, and we offer school supplies and materials at no cost to the families. We also reserve a portion of our federal funds under Section 1113(c)(3)(A) to support additional services tailored to the needs of homeless students.

In collaboration with services provided under the McKinney-Vento Act, our school appoints a liaison for homeless students to help coordinate these efforts. This liaison works directly with students and families to identify their specific needs and connect them with available resources. They also work with school staff to raise awareness about the challenges faced by homeless students and to train staff on how to best support these students in an educational setting.

Through these coordinated efforts, Sage Oak Charter School strives to create a supportive environment that mitigates the impact of homelessness on students' education, ensuring that all students have the opportunity to succeed and thrive academically.

Student Transitions

ESSA SECTIONS 1112(b)(8), 1112(b)(10), and 1112(b)(10) (A–B)

Describe, if applicable, how the LEA will support, coordinate, and integrate services provided under this part with early childhood education programs at the LEA or individual school level, including plans for the transition of participants in such programs to local elementary school programs.

N/A

Describe, if applicable, how the LEA will implement strategies to facilitate effective transitions for students from middle grades to high school and from high school to postsecondary education including:

(A) through coordination with institutions of higher education, employers, and other local partners; and

(B) through increased student access to early college high school or dual or concurrent enrollment opportunities, or career counseling to identify student interests and skills.

THIS ESSA PROVISION IS ADDRESSED BELOW:

At Sage Oak, we recognize the importance of smooth transitions for students moving from middle grades to high school and from high school to postsecondary education. Our strategies are designed to support these critical transitions, ensuring that our students are well-prepared for each new phase of their educational journey.

Key to facilitating the transition from middle grades to high school, Sage Oak ensures our curriculum aligns with the latest academic standards and opportunities. Additionally, we engage with local employers and community partners to provide students with relevant insights into various career paths and the skills required in the workforce, enriching our curriculum with practical applications and real-world relevance.

For students transitioning from high school to postsecondary education or careers, Sage Oak offers robust programs designed to enhance college and career readiness. This includes increased access to early college high school programs, dual or concurrent enrollment opportunities, and comprehensive career counseling services. Our educational advisors play a crucial role in this process, working individually with students to create personalized learning plans that reflect their academic and career goals. These plans are instrumental in navigating course selections, extracurricular activities, and appropriate early college opportunities, tailored to each student's unique interests and skills. Additionally, we are actively increasing our Career and Technical Education (CTE) pathways to include new areas such as Child Development, Sports Medicine, and Arts, Media, and Entertainment (AME), offering students practical and varied career training options that align with their personal interests and market demands. We maintain up-to-date knowledge of University of California (UC) and California State University (CSU) requirements, as well as offerings at community colleges, to guide our students effectively through their educational pathways.

In addition to these transition strategies, our commitment under LCAP Action 1:4 involves developing unified articulation processes that seamlessly transition students through each grade band. This includes integrating critical feedback from graduates and their families to enhance the continuity and relevance of our curriculum, further ensuring our students are prepared for the expectations and challenges of their subsequent educational stages.

Sage Oak’s proactive approach ensures that our students are not only aware of their postsecondary options but are also equipped to make informed decisions about their futures. By staying abreast of the latest educational requirements and offerings and implementing these strategies in coordination with higher education institutions, employers, and local partners, we prepare our students to successfully navigate the transitions between educational stages, fully equipped with the knowledge, skills, and qualifications needed to thrive in their chosen paths.

Additional Information Regarding Use of Funds Under this Part

ESSA SECTION 1112(b)(13) (A–B)

Provide any other information on how the LEA proposes to use funds to meet the purposes of this part, and that the LEA determines appropriate to provide, which may include how the LEA will:

(A) assist schools in identifying and serving gifted and talented students; and
(B) assist schools in developing effective school library programs to provide students an opportunity to develop digital literacy skills and improve academic achievement.

THIS ESSA PROVISION IS ADDRESSED BELOW:

N/A

TITLE I, PART D

Description of Program
ESSA SECTION 1423(1)

Provide a description of the program to be assisted [by Title I, Part D].

THIS ESSA PROVISION IS ADDRESSED BELOW:

Formal Agreements
ESSA SECTION 1423(2)

Provide a description of formal agreements, regarding the program to be assisted, between the
(A) LEA; and
(B) correctional facilities and alternative school programs serving children and youth involved with the juvenile justice system, including such facilities operated by the Secretary of the Interior and Indian tribes.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Comparable Education Program
ESSA SECTION 1423(3)

As appropriate, provide a description of how participating schools will coordinate with facilities working with delinquent children and youth to ensure that such children and youth are participating in an education program comparable to one operating in the local school such youth would attend.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Successful Transitions
ESSA SECTION 1423(4)

Provide a description of the program operated by participating schools to facilitate the successful transition of children and youth returning from correctional facilities and, as appropriate, the types of services that such schools will provide such children and youth and other at-risk children and youth.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Educational Needs
ESSA SECTION 1423(5)

Provide a description of the characteristics (including learning difficulties, substance abuse problems, and other special needs) of the children and youth who will be returning from correctional facilities and, as appropriate, other at-risk children and youth expected to be served by the program, and a description of how the school will coordinate existing educational programs to meet the unique educational needs of such children and youth.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Social, Health, and Other Services
ESSA SECTION 1423(6)

As appropriate, provide a description of how schools will coordinate with existing social, health, and other services to meet the needs of students returning from correctional facilities, at-risk children or youth, and other participating children or youth, including prenatal health care and nutrition services related to the health of the parent and the child or youth, parenting and child development classes, child care, targeted reentry and outreach programs, referrals to community resources, and scheduling flexibility.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Postsecondary and Workforce Partnerships
ESSA SECTION 1423(7)

As appropriate, provide a description of any partnerships with institutions of higher education or local businesses to facilitate postsecondary and workforce success for children and youth returning from correctional facilities, such as through participation in credit-bearing coursework while in secondary school, enrollment in postsecondary education, participation in career and technical education programming, and mentoring services for participating students.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Parent and Family Involvement
ESSA SECTION 1423(8)

As appropriate, provide a description of how the program will involve parents and family members in efforts to improve the educational achievement of their children, assist in dropout prevention activities, and prevent the involvement of their children in delinquent activities.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Program Coordination
ESSA SECTION 1423(9–10)

Provide a description of how the program under this subpart will be coordinated with other Federal, State, and local programs, such as programs under title I of the Workforce Innovation and Opportunity Act and career and technical education programs serving at-risk children and youth.

Include how the program will be coordinated with programs operated under the Juvenile Justice and Delinquency Prevention Act of 1974 and other comparable programs, if applicable.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Probation Officer Coordination
ESSA SECTION 1423(11)

As appropriate, provide a description of how schools will work with probation officers to assist in meeting the needs of children and youth returning from correctional facilities.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Individualized Education Program Awareness
ESSA SECTION 1423(12)

Provide a description of the efforts participating schools will make to ensure correctional facilities working with children and youth are aware of a child's or youth's existing individualized education program.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Alternative Placements
ESSA SECTIONS 1423(13)

As appropriate, provide a description of the steps participating schools will take to find alternative placements for children and youth interested in continuing their education but unable to participate in a traditional public school program.

THIS ESSA PROVISION IS ADDRESSED BELOW:

TITLE II, PART A

Professional Growth and Improvement

ESSA SECTION 2102(b)(2)(B)

Provide a description of the LEA's systems of professional growth and improvement, such as induction for teachers, principals, or other school leaders and opportunities for building the capacity of teachers and opportunities to develop meaningful teacher leadership.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Address these questions:

1. Please provide a description of the LEA's systems of professional growth and improvement for teachers, principals, and other school leaders.
2. Please address principals, teachers, and other school leaders separately.
3. Please explain how the systems promote professional growth and ensure improvement, including how the LEA measures growth and improvement
4. Please describe how the systems support principals, teachers, and other school leaders from the beginning of their careers, throughout their careers, and through advancement opportunities
5. Please describe how the LEA evaluates its systems of professional growth and improvement and makes adjustments to ensure continuous improvement within these systems.

At Sage Oak, our professional development strategy is crafted to support educators at every stage of their careers, ensuring they are well-prepared to meet the diverse needs of our student body. This strategy begins with induction for new teachers and extends through ongoing development opportunities, including participation in professional development conferences such as those provided by the California Charter Schools Association (CCSA) and Charter Schools Development Center (CSDC).

We also broaden our educators' training with specialized sessions such as AVID training to bolster college readiness and the UC conference to align with university standards. Also, our staff partakes in targeted professional development focused on special education, ensuring that they are proficient in the latest methodologies and practices.

Our efforts are further supported by Professional Learning Communities (PLCs) which foster collaborative learning and data-driven decision-making. This collaborative environment allows educators to share insights and strategies, enhancing educational practices. ??Live instruction training is another critical component of our professional development program, ensuring that our educators are proficient in engaging students effectively in a dynamic and increasingly digital learning environment.

In addition, we provide leadership development opportunities for advancement pathways, ensuring a continuous cycle of professional growth and leadership within our school community.

We continually assess the effectiveness of our professional development programs through regular feedback, allowing us to align our strategies closely with both our educational goals and the evolving needs of the school. This comprehensive approach not only supports the professional growth of our educators but also enhances the overall educational experience for our students, ensuring that every member of our school community is equipped to thrive in an ever-changing educational landscape.

Prioritizing Funding

ESSA SECTION 2102(b)(2)(C)

Provide a description of how the LEA will prioritize funds to schools served by the agency that are implementing comprehensive support and improvement activities and targeted support and improvement activities under Section 1111(d) and have the highest percentage of children counted under Section 1124(c).

Address these questions:

1. Please describe the LEA's process for determining Title II, Part A funding among the schools it serves.
2. Please describe how the LEA determines funding that prioritizes CSI and TSI schools and schools serving the highest percentage of children counted under Section 1124(c).
3. Please describe how CSI and TSI schools and schools that have the highest percentage of children counted under Section 1124(c) that the LEA serves receive priority in Title II, Part A funding decisions compared to other schools the LEA serves.

THIS ESSA PROVISION IS ADDRESSED BELOW:

N/A

Data and Ongoing Consultation to Support Continuous Improvement

ESSA SECTION 2102(b)(2)(D)

Provide a description of how the LEA will use data and ongoing consultation described in Section 2102(b)(3) to continually update and improve activities supported under this part.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Address these questions:

1. Please explain how the LEA coordinates its Title II, Part A activities with other related strategies, programs, and activities.
2. Please describe how the LEA uses data to continually update and improve activities supported under Title II, Part A.
3. Please describe how the LEA uses ongoing consultation described in Section 2102(b)(3) to continually update and improve activities supported under Title II, Part A.
4. Please describe the sources of data the LEA monitors to evaluate Title II, Part A activities and how often it analyzes this data.
5. Please describe the ways in which the LEA meaningfully consults with the following educational partners to update and improve Title II, Part A-funded activities:
    a. Teachers
    b. Principals and other school leaders
    c. Paraprofessionals (including organizations representing such individuals)
    d. Specialized instructional support personnel
    e. Charter school leaders (in a local educational agency that has charter schools)
    f. Parents
    g. Community partners
    h. Organizations or partners with relevant and demonstrated expertise in programs and activities
6. Please explain how often the LEA meaningfully consults with these educational partners.

At Sage Oak, our approach to continuous improvement under Title II, Part A, revolves around a robust system of data analysis and ongoing consultation. We integrate Title II activities with our broader educational strategies, ensuring alignment with our holistic educational goals, such as those outlined in our Local Control and Accountability Plan (LCAP).

We employ a data-driven approach to monitor and refine professional development activities. This includes regular analysis of student performance data, staff feedback on professional development sessions, and other relevant metrics. Our Professional Learning Communities (PLCs) play a crucial role here, enabling educators to discuss and implement strategies based on data insights.

Sage Oak conducts evaluations of Title II, Part A activities throughout the academic year. This regular monitoring allows us to stay responsive to the needs of our educators and students, adapting our strategies to maximize effectiveness.

Our consultation process is inclusive, involving a wide range of stakeholders. We engage with teachers, principals, specialized instructional support personnel, and charter school leaders to ensure diverse perspectives are considered.

Community partners and organizations with relevant expertise are also involved, enriching our professional development programs.

By systematically integrating feedback and data into our professional development initiatives, Sage Oak Charter School ensures that our educational practices are not only aligned with current needs but are also poised for future success, fulfilling our commitment to continuous improvement.

TITLE III, PART A

Title III Professional Development

ESSA SECTION 3115(c)(2)

Describe how the eligible entity will provide effective professional development to classroom teachers, principals and other school leaders, administrators, and other school or community-based organizational personnel.

Complete responses will:

Address professional development activities specific to English learners/Title III purposes that are:

1. designed to improve the instruction and assessment of English learners;
2. designed to enhance the ability of such teachers, principals, and other school leaders to understand and implement curricula, assessment practices and measures, and instructional strategies for English learners;
3. effective in increasing children's English language proficiency or substantially increasing the subject matter knowledge, teaching knowledge, and teaching skills of such teachers;
4. of sufficient intensity and duration (which shall not include activities such as one-day or short-term workshops and conferences) to have a positive and lasting impact on the teachers' performance in the classroom; and
5. supplemental to all other funding sources for which the LEA is eligible.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Enhanced Instructional Opportunities

ESSA SECTIONS 3115(e)(1) and 3116

Describe how the eligible entity will provide enhanced instructional opportunities for immigrant children and youth.

Complete responses will:

1. Describe the activities implemented, supplemental to all other funding sources for which the LEA is eligible, that provide enhanced instructional opportunities for immigrant children and youth.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Title III Programs and Activities

ESSA SECTIONS 3116(b)(1)

Describe the effective programs and activities, including language instruction educational programs, proposed to be developed, implemented, and administered under the subgrant that will help English learners increase their English language proficiency and meet the challenging State academic standards.

Complete responses will:

1. Address the effective language instruction programs specific to English learners.
2. Address Title III activities that:
   - are focused on English learners and consistent with the purposes of Title III;
   - enhance the core program; and
   - are supplemental to all other funding sources for which the LEA is eligible.

THIS ESSA PROVISION IS ADDRESSED BELOW:

English Proficiency and Academic Achievement

ESSA SECTIONS 3116(b)(2)(A-B)

Describe how the eligible entity will ensure that elementary schools and secondary schools receiving funds under Subpart 1 assist English learners in:

(A) achieving English proficiency based on the State's English language proficiency assessment under Section 1111(b)(2)(G), consistent with the State's long-term goals, as described in Section 1111(c)(4)(A)(ii); and
(B) meeting the challenging State academic standards.

Complete responses will:

1. Address how sites will be held accountable for meeting English acquisition progress and achievement goals for English learners.
2. Address site activities that are supplemental to all other funding sources for which the LEA is eligible.

THIS ESSA PROVISION IS ADDRESSED BELOW:

TITLE IV, PART A

Title IV, Part A Activities and Programs

ESSA SECTION 4106(e)(1)

Each LEA, or consortium of LEAs, shall conduct the Title IV needs assessment once every 3 years. (see below)

Describe the activities and programming that the LEA, or consortium of such agencies, will carry out under Subpart 1, including a description of:

(A) any partnership with an institution of higher education, business, nonprofit organization, community-based organization, or other public or private entity with a demonstrated record of success in implementing activities under this subpart;
(B) if applicable, how funds will be used for activities related to supporting well-rounded education under Section 4107;
(C) if applicable, how funds will be used for activities related to supporting safe and healthy students under Section 4108;
(D) if applicable, how funds will be used for activities related to supporting the effective use of technology in schools under Section 4109; and
(E) the program objectives and intended outcomes for activities under Subpart 1, and how the LEA, or consortium of such agencies, will periodically evaluate the effectiveness of the activities carried out under this section based on such objectives and outcomes.

NOTE: If the LEA received more than $30,000 in Title IV, Part A funding and did not transfer the allocation, the LEA must:

1. use not less than 20 percent of Title IV, Part A funds to support one or more safe and healthy student activities;
2. use not less than 20 percent of Title IV, Part A funds to support one or more well-rounded education activities;
3. use a portion of Title IV, Part A funds to support one or more effective use of technology activities; and
   a) 15 percent max cap on effective use of technology for purchasing technology infrastructure.

THIS ESSA PROVISION IS ADDRESSED BELOW:

At Sage Oak, our utilization of Title IV, Part A funds is closely aligned with LCAP Goal 3, which focuses on enhancing our technological capabilities to support personalized learning and operational efficiency. We invest in innovative educational technologies, including the development and integration of AI-driven tools. These technologies are designed to tailor learning experiences to individual student needs and streamline administrative processes, thereby enhancing educational outcomes and operational efficacy.

Our objective with these funds is to not only integrate cutting-edge technology into our curriculum but also to ensure these tools effectively support our educational goals. We periodically evaluate the effectiveness of these technological interventions by analyzing student engagement metrics, academic performance data, and operational efficiency indicators. This ongoing assessment helps us refine our technology strategy to ensure it remains aligned with the evolving needs of our students and the broader educational landscape, maintaining our commitment to providing a high-quality, future-ready education.

Title IV, Part A Needs Assessment

According to the Every Student Succeeds Act (ESSA), all local educational agencies (LEAs) receiving at least $30,000 must conduct a needs assessment specific to Title IV, Part A (ESSA Section 4106[f]). Each LEA, or consortium of LEAs, shall conduct the needs assessment once every three year (ESSA Section 4106[d][3]).

Well-rounded Education Opportunities (ESSA Section 4107)

Identify any indicators, or measures/data points to examine needs for improvement of the Title IV, Part A priority content areas.

What activities will be included within the support for a well-rounded education?

How will the activities be evaluated for the effectiveness of strategies and activities funded under Title IV, Part A. Include the indicators, or measures/data points used to determine future program planning?

Safe and Healthy Students (ESSA Section 4108)

Identify any indicators, or measures/data points to examine needs for improvement of the Title IV, Part A priority content areas.

What activities will be included within the support for safety and health of students?

How will the activities be evaluated for the effectiveness of strategies and activities funded under Title IV, Part A. Include the indicators, or measures/data points used to determine future program planning?

Effective Use of Technology (ESSA Section 4109)

Identify any indicators, or measures/data points to examine needs for improvement of the Title IV, Part A priority content areas.

What activities will be included within the support of effective use of technology? Note: No more than 15 percent on technology infrastructure (ESSA Section 4109[b])

How will the activities be evaluated for the effectiveness of strategies and activities funded under Title IV, Part A. Include the indicators, or measures/data points used to determine future program planning?

- Note: All planned activities must meet the authorized use of funds criteria located on the Title IV, Part A Authorized Use of Funds web page at https://www.cde.ca.gov/sp/st/tivpaauthuseoffunds.asp.

Date of LEA's last conducted needs assessment:

Title IV, Part A Program
Rural Education and Student Support Office
California Department of Education
Email: TitleIV@cde.ca.gov Web site: https://www.cde.ca.gov/sp/st/

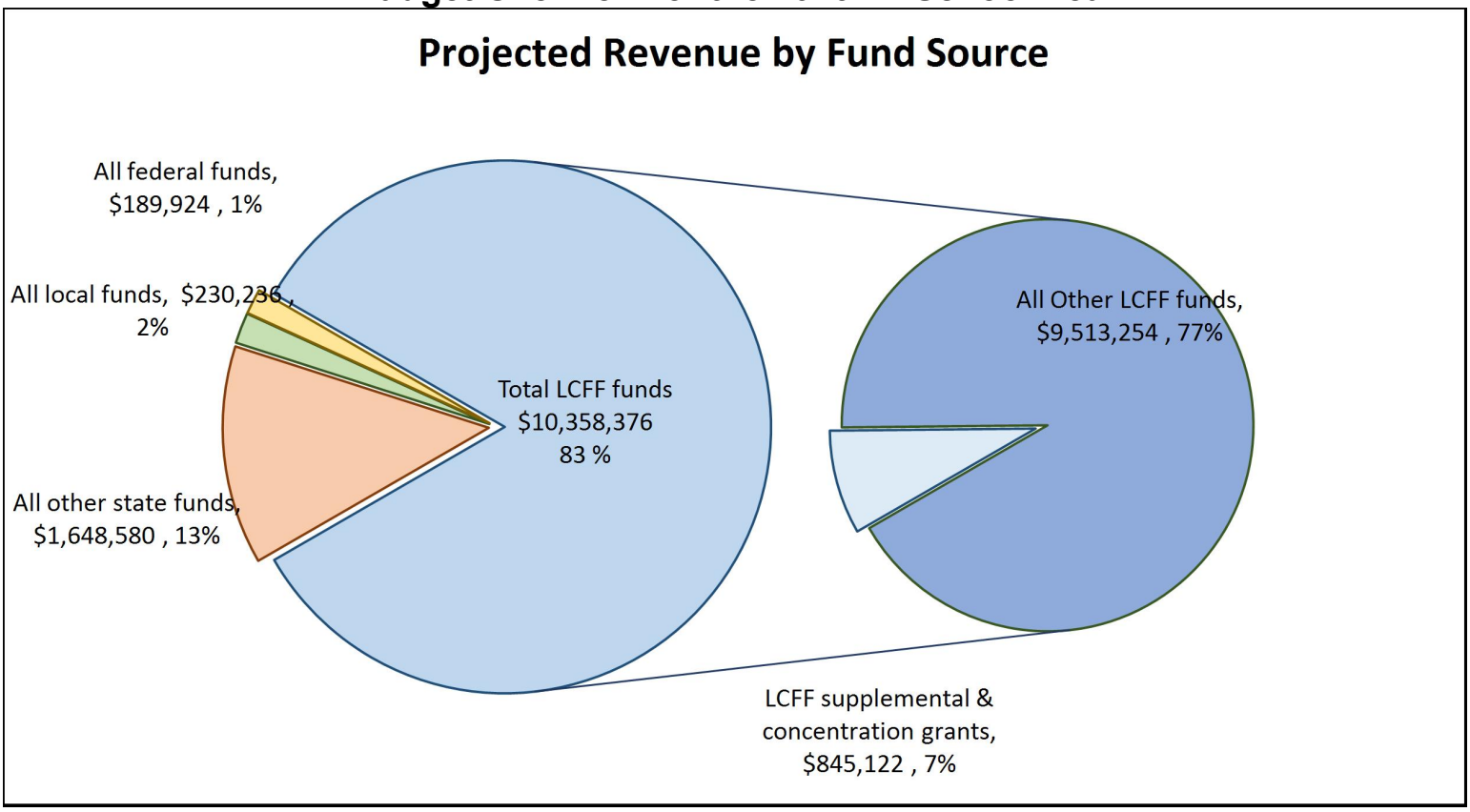
California Department of Education
February 2022

LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Sage Oak Charter School- South
CDS Code: 37-75416-0139378
School Year: 2026-27
LEA contact information:
Krista Woodgrift
Superintendent
kwoodgrift@sageoak.education
888-435-4445

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

Budget Overview for the 2026-27 School Year

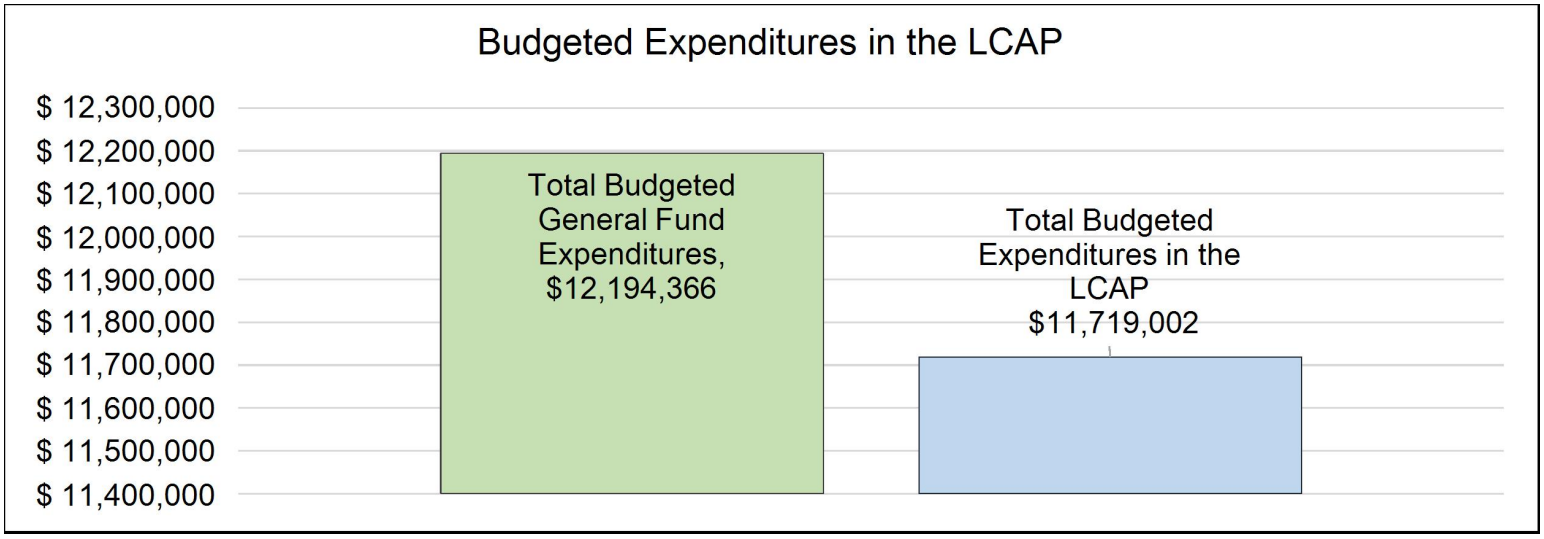


This chart shows the total general purpose revenue Sage Oak Charter School- South expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Sage Oak Charter School- South is $12,427,116, of which $10,358,376 is Local Control Funding Formula (LCFF), $1,648,580 is other state funds, $230,236 is local funds, and $189,924 is federal funds. Of the $10,358,376 in LCFF Funds, $845,122 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Sage Oak Charter School- South plans to spend for 2026-27. It shows how much of the total is tied to planned actions and services in the LCAP.

The text description of the above chart is as follows: Sage Oak Charter School- South plans to spend $12,194,366 for the 2026-27 school year. Of that amount, $11,719,002 is tied to actions/services in the LCAP and $475,364 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

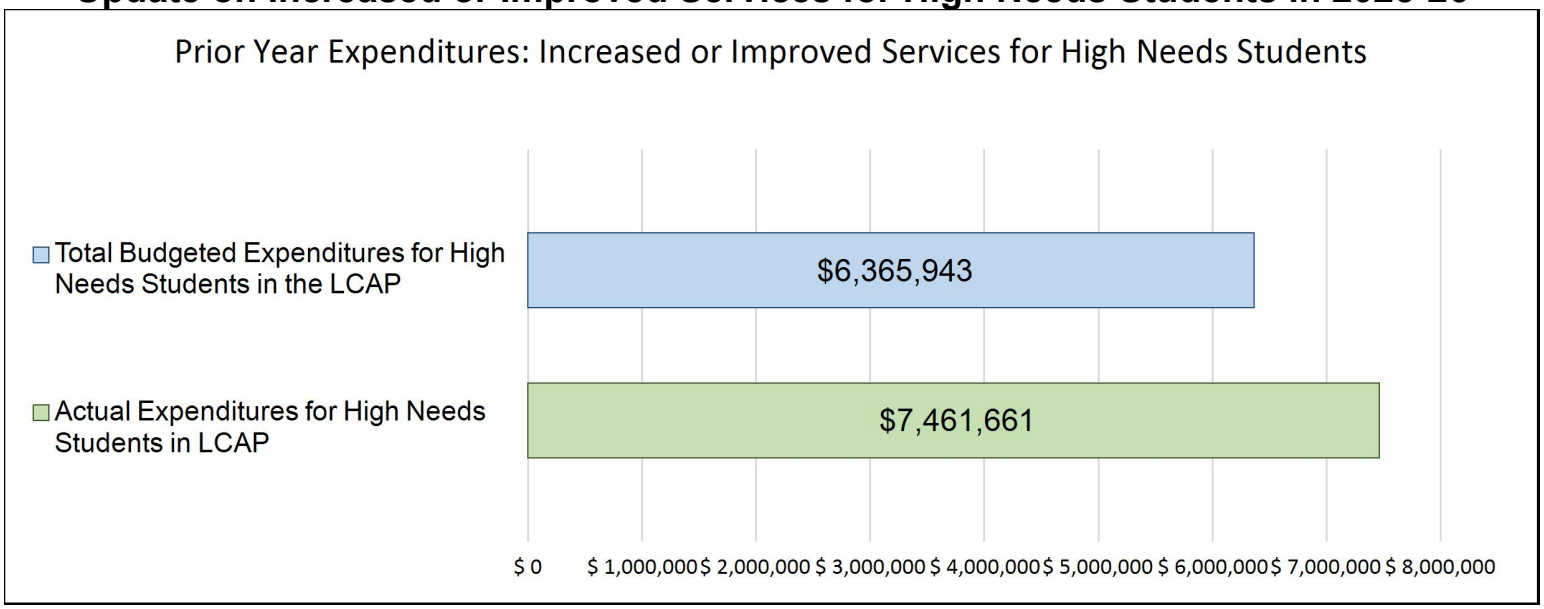
Certain expenditures such as charter oversight fees, human resources administration, legal and compliance services, insurance, rent, and utilities, are necessary operational costs incurred to maintain Sage Oak's educational program and organization infrastructure.

Increased or Improved Services for High Needs Students in the LCAP for the 2026-27 School Year

In 2026-27, Sage Oak Charter School- South is projecting it will receive $845,122 based on the enrollment of foster youth, English learner, and low-income students. Sage Oak Charter School- South must describe how it intends to increase or improve services for high needs students in the LCAP. Sage Oak Charter School- South plans to spend $8,940,537 towards meeting this requirement, as described in the LCAP.

LCFF Budget Overview for Parents

Update on Increased or Improved Services for High Needs Students in 2025-26



This chart compares what Sage Oak Charter School- South budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Sage Oak Charter School- South estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2025-26, Sage Oak Charter School- South's LCAP budgeted $6,365,943 for planned actions to increase or improve services for high needs students. Sage Oak Charter School-South actually spent $7,461,661 for actions to increase or improve services for high needs students in 2025-26.

Local Control and Accountability Plan

The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Sage Oak Charter School- South	Krista Woodgrift Superintendent	kwoodgrift@sageoak.education 888-435-4445

Plan Summary [2026-27]

General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA. LEAs may also provide information about their strategic plan, vision, etc.

Sage Oak Charter School - South (Sage Oak) educates students through a personalized and collaborative learning approach, offering students from transitional kindergarten through 12th grade an empowering education designed to prepare them for purposeful and productive lives. At Sage Oak, we cherish the individuality of each student, inspiring them to leverage their unique potential and contribute positively to their communities. Our commitment to our students is encapsulated in our core values: Service, Accountability, Growth Mindset, and Excellence, which guide our educational approach and community interactions.

Operating across a diverse geographical region that includes San Diego, Riverside, Imperial, and Orange. Sage Oak offers a unique balance of flexibility, accountability, and academic excellence. Our educational model emphasizes the importance of partnership between educators and families, ensuring that each student's personal academic goals are achieved through a tailored educational experience.

Sage Oak is dedicated to harnessing the power of flexible learning environments and advanced educational technologies to cater to a wide range of learners. Our approach is characterized by personalized learning pathways that accommodate students' diverse backgrounds and aspirations, providing them with a stimulating and supportive alternative to traditional education models. Through the integration of a varied curriculum, individualized support, and high academic standards, Sage Oak fosters an environment where students are encouraged to become self-motivated, competent, lifelong learners poised to make a meaningful impact in their communities. Sage Oak's student input is comprehensive, spanning academics, well-being, testing, and targeted populations. This data set is a cornerstone for school improvement.

Our educational philosophy prioritizes the development of open, curious, and alert minds, preparing students to thrive in any learning situation. By offering the flexibility to learn anytime and anywhere, combined with adaptable teaching and curricular models, Sage Oak empowers students to take ownership of their education. This approach equips them with not only the necessary knowledge and skills but also the confidence, creativity, and resourcefulness to navigate the challenges and opportunities of the 21st century.

As of the most recent data reporting period, Sage Oak serves a vibrant and diverse student body, with enrollment reflecting a broad spectrum of cultural and socio-economic backgrounds. Our commitment to inclusivity and excellence is evident in our dedicated staff, innovative programs, and the supportive community that makes Sage Oak a leader in personalized education.

Based on the Fall 1 Census data reporting on October 1, 2025, to be reported on the California Dashboard, there were 693 students enrolled. Other student groups are as follows: 49.93% are classified as Socioeconomically Disadvantaged (SED). Students with Disabilities (SWD) make up 7.07% of the population, and English Learners (EL) make up 1.89%. The ethnic diversity of Sage Oak includes students who are White (48.2%), Hispanic (37.2%), Two or More Races (7%), Asian (3%), African American (3.2%), Filipino (.8%), American Indian/Alaskan Native (.0%), and Native Hawaiian/Other Pacific Islander (.4%).

Reflections: Annual Performance

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

Reflecting on Sage Oak's annual performance through the California School Dashboard and local data reveals both significant strengths and areas for continued growth. Sage Oak performs above the state in all Dashboard indicators, demonstrating the strength of its academic program and student support systems. Key areas of success include strong college and career readiness outcomes, very low rates of chronic absenteeism, suspension, and expulsion, and a positive school environment that supports student engagement and success.

At the same time, state and local data highlight ongoing challenges in academic performance for Students with Disabilities (SWD) and Socioeconomically Disadvantaged (SED) students. Mathematics remains a key area of need, particularly for Students with Disabilities, making it an important focus for continued improvement efforts. While there is not sufficient data to report performance for English Learners (EL), Homeless, and Foster Youth student groups due to small population sizes, the school remains committed to strengthening the overall academic foundation and addressing identified gaps to support equitable outcomes for all students.

California School Dashboard Analysis

ELA Distance from Standard (DFS):

- Overall : +10.2
- EL: n/a- not enough students
- SWD: -19
- SED: –20.1

Math DFS:

- Overall: -17.7
- EL: n/a- not enough students
- SWD: -43.3
- SED: -48.1

Chronic Absenteeism: 2.1%

Graduation Rate: 88.2% (not enough students for a color)

Suspension: 0%

Expulsion: 0%

College and Career Readiness: 70.6%

EL Progress (ELPI): n/a- not enough students

iReady Local Assessment Analysis

ELA (on or above grade level):
- Overall : 66%
- EL: 40% (10 students)
- SWD: 48%
- SED: 59%
- Homeless: 60% (5 students)
- Foster: n/a

Math (on or above grade level):
- Overall: 62%
- EL: 50% (10 students)
- SWD: 40%
- SED: 54%
- Homeless: 60% (5 students)
- Foster: n/a

In response to these outcomes, Sage Oak continues to align its improvement efforts to its LCAP goals. Strategic actions include targeted interventions, expanded professional development opportunities, integration of advanced technologies, and personalized learning pathways to better meet individual student needs. The school also remains committed to strengthening college and career readiness pathways so that students are well prepared for future academic and career opportunities. This comprehensive approach is intended to improve outcomes for all students, with a particular emphasis on those student groups requiring additional academic and social-emotional support.

Learning Recovery Emergency Block Grant (LREBG) and Title I, Part A

Sage Oak utilized unexpended Learning Recovery Emergency Block Grant (LREBG) funds for the 2025–26 school year. Additionally, LREBG and Title I, Part A funded actions can be found in Goal 1, Action 2 and Goal 2, Action 4. A review of state and local data, along with stakeholder engagement feedback, indicates an ongoing need to strengthen the Multi-Tiered System of Supports (MTSS) and counseling services for qualifying students. These efforts are intended to maintain small teacher-to-student ratios and address the engagement and academic needs of all student groups.

During this school year, Sage Oak has used these funds to support the hiring of reading specialists and an intervention teacher. The school has strategically invested LREBG and Title I, Part A funding to expand staff capacity and strengthen intervention programs and resources for students, particularly in English Language Arts and Mathematics through small-group instruction. These actions align with allowable uses of funds in the areas of staff hiring and professional support and are designed to improve access, intervention, and academic outcomes for students in need of additional support. See action descriptions for additional details.

Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

n/a

Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

n/a

Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

n/a

Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

n/a

Engaging Educational Partners

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Educational Partner(s)	Process for Engagement
Parent Advisory Committee	The Parent Advisory Committee (PAC) played a pivotal role in shaping the Local Control and Accountability Plan (LCAP) by participating in key meetings on October 2, 2025; December 4, 2025; January 15, 2026; and May 7, 2026. These meetings fostered open dialogue and provided valuable opportunities for parents to learn, share insights, and offer thoughtful feedback. Throughout the year, parents engaged in discussions and contributed input on a range of key initiatives, including the launch of Power Standards, Sage Oak's Safety Plan, the English Learner Program, the counseling program, and the Program for Advanced and Gifted Education (PAGE). They also provided feedback on technology support efforts, including the introduction of new Chromebooks and the Self-Help IT Portal. In addition, parents reviewed and provided input on the LCAP mid-year and end-of-year reports, as well as the local indicators presentation, helping ensure the plan reflects the needs and priorities of the school community.
Student Advisory Committee	The Student Advisory Committee (STAC) played a meaningful and collaborative role in supporting the development of the LCAP through active participation in meetings on October 2, 2025; December 4, 2025; January 15, 2026; and May 7, 2026. These meetings fostered open dialogue and provided valuable opportunities for students to learn, share insights, and offer thoughtful feedback. Throughout the year, students contributed input on a range of key initiatives, including the launch of Power Standards, the introduction of new Chromebooks and the Self-Help IT Portal, the counseling program, the Program for

Educational Partner(s)	Process for Engagement
	Advanced and Gifted Education (PAGE), and key LCAP topics such as student supports, school safety, technology access, and college and career readiness. Students also participated in a Chromebook trial to help ensure that devices are appropriate across grade levels and support a variety of learning needs and uses. In addition, students provided feedback on the LCAP mid-year and end-of-year reports, as well as the local indicators presentation, helping ensure the plan reflects the needs and priorities of the school community.
Parents, Students, Teachers, Staff	In the development of the LCAP, a comprehensive approach was employed to engage parents, staff, and students, ensuring their voices were integral to the plan. This inclusive process utilized various survey platforms, such as Parsec Reals survey platform, to gather in-depth feedback including an AI-led interview regarding parent input. "Question of the Month" surveys were instrumental in capturing ongoing input, while educational partner surveys provided broader insights into the needs and perspectives of the school community. Additionally, climate surveys were conducted to understand the overall environment and satisfaction levels within the educational setting. This multifaceted engagement strategy ensured a diverse range of feedback, which was crucial in shaping a well-rounded and effective LCAP.
Principals, Leadership, Administrators	Principals, the leadership team, and administrators played an essential role in shaping the LCAP by engaging in strategic planning and collaborative review throughout the year. Through regular "Question of the Month" surveys, leadership gathered valuable staff feedback that provided important insights for informed decision-making and continuous improvement. In addition, during key meetings held on May 8, 2025; September 3, 2025; October 1, 2025; October 30, 2025; November 12, 2025; January 14, 2026; February 4, 2026; and April 15, 2026, the leadership team participated in both half-day and full-day sessions focused on examining the school's specific needs, analyzing student achievement data, reviewing feedback from educational partners, and developing and monitoring the annual strategic plan as it relates to the LCAP. These sessions were critical to aligning the LCAP with the school's broader goals and ensuring the plan remained responsive, strategic,

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Educational Partner(s)	Process for Engagement
	and grounded in data. Leadership also used these opportunities to review progress toward LCFF priorities and assess how schoolwide initiatives and resource decisions support student outcomes. This collaborative and methodical approach helped ensure a well-structured LCAP that reflects the diverse needs of the student body and supports continuous improvement across the organization.
Title 1 Parents/Guardians	In the development of the LCAP, Sage Oak Charter Schools prioritized meaningful engagement with Title I parents and guardians through a range of outreach and participation opportunities grounded in its Parent and Family Engagement Policy. One key activity was the annual Title I Parent/Guardian Information Meeting, held virtually during the Parent Summit on August 11, 2025, to maximize accessibility for families. Parents were also invited to participate in quarterly ELAC meetings, English Language Proficiency Assessments for California (ELPAC) information sessions in November, and intervention class information sessions in September. These meetings created opportunities for two-way communication, allowing families to learn more about Title I services, ask questions, and provide input on school programs and student needs. Sage Oak also offered a flexible range of engagement opportunities, including recorded sessions, parent and guardian webinars, and a school-parent compact process that invited family feedback. Together, these efforts helped foster an inclusive and supportive school culture. Through ongoing communication, such as personalized emails, the weekly Sage News, and targeted outreach to families of Title I students, Sage Oak worked to ensure that parents remained informed and meaningfully involved in their child's education. These strategies reflect Sage Oak's continued commitment to strong family-school partnerships and to ensuring that parent voice helps inform educational priorities, support academic success, and strengthen outcomes for students.
Community Partners	In the development of the LCAP, the school's partnership with Parsec Education marked a significant enhancement in strategic planning and program evaluation. Parsec Education's expertise was

Educational Partner(s)	Process for Engagement
	particularly instrumental in developing 'Street Data Metrics,' a set of advanced, nuanced measures designed to provide a deeper understanding of educational impact and student outcomes. This collaboration represents a commitment to incorporating expert external insights and data-driven methodologies into the LCAP. The involvement of Parsec Education not only introduced innovative perspectives to the planning process but also ensured that the evaluation of programs was thorough and reflective of real-world educational scenarios. This partnership, especially in the development of these tailored 'Street Data Metrics,' underscores the school's dedication to employing comprehensive, expert-driven strategies to achieve its educational goals and enhance the overall learning experience.

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

The adopted LCAP for Sage Oak Charter School was meaningfully shaped by feedback gathered throughout the year from parents, students, staff, leadership, Title I families, advisory committees, and community partners. Input from the PAC, ELAC, STAC, and the newly added Sage Connections committee helped confirm the importance of maintaining strong systems for communication, student support, and school connectedness. Educational partners consistently emphasized the value of meaningful opportunities for involvement, high-quality counseling and social-emotional supports, safe and respectful learning environments, improved onboarding for new students, strong technology access and support, and continued attention to college and career readiness. Parent and student feedback also informed decisions related to Power Standards, the English Learner Program, the counseling program, PAGE, new Chromebooks, the Self-Help IT Portal, and other efforts designed to improve access, responsiveness, and the overall student experience. Mid-year reporting also reflected that Sage Oak’s engagement work included PAC, STAC, ELAC, and Sage Connections, as well as targeted events and expanded opportunities for connection across the school community.

The LCAP was also influenced by broader survey and planning data collected through Parsec Reals, Question of the Month surveys, climate surveys, staff feedback tools, and strategic planning sessions with principals, leadership, and administrators. These data sources helped the school identify both strengths and areas for refinement, including the continued need to strengthen multilingual learner access, improve math support through engaging formats and tutoring, expand live and synchronous instructional quality, and build out college and career readiness experiences and community connection opportunities. Feedback from staff and leadership also supported continued investment in professional development, operational efficiency, technology integration, and systems that improve service delivery while preserving Sage Oak’s relationship-based model. In addition, educational partner feedback reinforced the value of events, engagement opportunities, and experiential learning experiences that help students build connection, explore interests, and access college and career pathways. Together, this feedback ensured that the adopted LCAP remained responsive, data-informed, and aligned to the priorities most clearly expressed by the school community.

Ultimately, Sage Oak's LCAP reflects a collaborative, transparent, and evolving strategy designed to meet the diverse needs of its learners. Through intentional and recurring engagement with families and staff, Sage Oak continues to position itself as a leader in personalized, inclusive education—preparing all students, especially those with the greatest needs, to thrive academically and personally.

Goals and Actions

Goal

Goal #	Description	Type of Goal
1	Student Outcomes: Academic Achievement and College and Career Readiness 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.	Broad Goal

State Priorities addressed by this goal.

Priority 1: Basic (Conditions of Learning)
Priority 2: State Standards (Conditions of Learning)
Priority 3: Parental Involvement (Engagement)
Priority 4: Pupil Achievement (Pupil Outcomes)
Priority 5: Pupil Engagement (Engagement)
Priority 6: School Climate (Engagement)
Priority 7: Course Access (Conditions of Learning)
Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

Sage Oak developed this goal to ensure that all students have access to a strong academic foundation, meaningful college and career preparation, and the targeted supports needed to succeed. At the center of this goal is a commitment to providing a high-quality, personalized educational program that helps students build academic proficiency, critical thinking skills, and readiness for life beyond high school. Through comprehensive K–12 pathways, rigorous coursework, intervention supports, and opportunities for real-world application, Sage Oak aims to prepare students to become capable learners, problem solvers, and engaged members of their communities.

Sage Oak's data show both areas of strength and areas of continued need, which is why this goal remains a priority. The percentage of students completing A–G requirements increased to 64.71%, exceeding the school's three-year target, and college and career indicator performance increased to 70.6%, showing strong progress toward postsecondary readiness. At the same time, CTE pathway completion remains below target, and some student groups continue to need additional academic support, particularly in Mathematics. CAASPP and local assessment results show meaningful growth in several areas, but also confirm the need to continue strengthening support for socioeconomically disadvantaged students and students with disabilities. In response, Sage Oak will continue emphasizing college and

career readiness supports, development of additional pathway opportunities, targeted math intervention, expanded synchronous instruction, professional development for staff, and data-informed systems of support designed to help all students reach their fullest potential.

By embedding learning within innovative, personalized, and standards-aligned programs, and by using resources such as Learning Recovery Emergency Block Grant and Title I, Part A funds to strengthen staffing and student supports, this goal directly advances academic achievement, college and career readiness, and equitable access to opportunity. This approach reflects Sage Oak's commitment to ensuring that all students, especially those with the greatest needs, have the instruction, intervention, and support necessary to succeed.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.1	Completion of A-G Requirements: % of students successfully completing the A-G requirements	58.3% Source: Dataquest 22-23	56.5%	64.7%	63.3%	4.7%
1.2	Career Technical Education (CTE) Pathway Completion # of students completing CTE pathways	1 student Source: Dataquest 22-23	0 students	3 students	6 students	2
1.3	Percentage of Students Achieving a Score of 3 or Higher on AP Exams	100% Source: College Board 22-23	100%	87.5%	70% or higher	-12.5%
1.4	College and Career Indicator (CCI) Performance % of students considered college and career prepared	66.7% Source: CA Dashboard 22-23	60.9%	70.6%	72%	3.9%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	according to the CA Dashboard					
1.5	Graduation Rate Maintenance % of graduated students on the CA Dashboard	83.3% Source: CA Dashboard 22-23	95.8%	88.2%	90%	4.9%
1.6	Maintenance of Low Middle School Dropout Rates # of middle school dropouts	0% Source: Internal 22-23	0%	.9%	0%	.9%
1.7	Maintenance of Low High School Dropout Rates % of high school dropouts according to DataQuest cohorts	0% Source: Dataquest 22-23	4.35% (1 student)	0%	less than 2%	0%
1.8	Expansion of K-8 Live Synchronous Instruction Courses Aligned with CTE Pathways # of K-8 synchronous course offerings that align with the CTE pathways	79 course offerings Source: Internal 22-23	198 course offerings	280 course offerings	200 course offerings	201

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.9	Performance in iReady Assessments for ELA and Math % of students achieving at or above grade level in iReady assessments for English Language Arts (ELA) and Mathematics	Math- 55% ELA- 63% Source: i-Ready Spring 23-24	Math- 56% ELA- 65%	Math -61% ELA - 66%	Math- 58% ELA- 66%	Math- 6% ELA- 3%
1.10	California Assessment of Student Performance and Progress (CAASPP) Achievement % of students who have met or exceeded standards in CAASPP assessments for English Language Arts (ELA) and Mathematics	Math- 37.18% ELA- 55.49% Source: Dataquest 22-23	Math -36.22% ELA -54.05%	Math - 42.31% ELA - 57.31%	Math- 41% ELA- 58%	Math 3.82% ELA 1.82%
1.11	CAASPP Performance for Socio-Economically Disadvantaged (SED) Students % of socio-economically disadvantaged students meeting or exceeding CAASPP standards in English Language Arts (ELA) and Mathematics	Math- 32.69% ELA- 40% Source: Dataquest 22-23	Math -21.88% ELA-42.19%	Math - 29.67% ELA - 49.45%	Math- 35% ELA- 43%	Math 3.02% ELA 9.45%
1.12	Accessibility to Instructional Materials	100%	100%	100%	100%	0

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	% of students with full access to necessary instructional materials	Source: SARC 23-24				
1.13	Alignment with State Standards % of students whose education is fully aligned with state standards	100% Source: SARC 23-24	100%	100%	100%	0
1.14	Community Belief in Robust Curriculum % of parents, students, and staff who believe that students have access to a challenging and comprehensive curriculum supported by resources that enable them to meet and exceed grade-level standards in core content areas.	Parents- 99% Students- 98% Staff- 99% Source: Internal 23-24	Parents - 99% Students - 94% Staff -94%	Parents - 97% Students - 97% Staff - 97%	Parents- 90% or higher Students- 90% or higher Staff- 90% or higher	Parents -2%% Students -1% Staff -2%
1.15	Growth in ELA and Math Among Intervention Students % of students receiving interventions who demonstrate growth equivalent to one year or more in English	Math- 48% ELA- 33% Source: Internal 22-23	Math - 67% ELA - 58%	Math - 53% ELA - 49%	Math- 53% ELA- 38%	Math 5% ELA 16%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	Language Arts (ELA) and Mathematics					
1.16	Increased Participation Rate in Math Interventions for Students with Disabilities (SWD) # of SWD participating in math intervention programs	40% Source: Internal 23-24	49%	55%	60%	15%
1.17	Increased iReady Math Achievement for Students with Disabilities (SWD) Decrease % of SWD moving out of Tier 3 in iReady math assessments	47% Source: i-Ready 22-23	33%	32%	44%	-15%
1.18	Improved CAASPP Performance for SWD in Math Achievement Increase in DFS in Math for SWD 3 points annually	-86.8 DFS Source: CA Dashboard 22-23	-64.4 DFS	-43.3 DFS	-77 DFS	43.5
1.19	Increased Teacher Preparedness for Student Articulation	78% Source: Internal 22-23	98%	97%	90% or higher	19%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	% of teachers who feel equipped to effectively prepare and transition their students to the next grade level band					

Goal Analysis [2025-26]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Academic Achievement: Advancing Student Outcomes Through Pathways, Targeted Support, and Instructional Alignment

During the 2025–26 school year, Sage Oak continued implementation of Goal 1 with a focus on improving academic achievement, college and career readiness, personalized intervention, math support for students with disabilities, and articulation across grade spans. Implementation remained aligned with the planned actions and reflected the school's continued commitment to preparing students for success through comprehensive K–12 pathways, data-informed supports, and responsive instructional practices. Core efforts included integrating career, community, and life skills into student pathways, refining a personalized multi-tiered system of support, expanding math intervention for students with disabilities, and strengthening articulation across grade bands.

A major success in implementation was the school's continued effort to carry out all four planned actions in a coordinated way. College and career readiness work included increased focus on decisions after high school graduation, expanded college and career week experiences, and continued emphasis on pathways-based opportunities for students. Live synchronous instruction directly aligned with CTE pathways continued to expand substantially, increasing access to coursework connected to student interests and future goals. Sage Oak also continued to strengthen academic systems through the use of Power Standards,common assessments aligned to the school's priority standards, evaluation of core curriculum, and the Professional Development Passport for staff, evaluation of core curriculum, and the Professional Development Passport, all of which supported stronger alignment, more consistent instructional expectations, and improved teacher capacity. I-Ready local assessment results also showed meaningful academic progress, with Math increasing from a 56% baseline to 62% in Year 2 and Reading increasing from a 63% baseline to 66% in Year 2, indicating that Sage Oak is making steady progress toward its three-year goal of increasing performance by 3 percentage points from baseline. Intervention systems were further strengthened through additional math support in grades 3–5 and high-dose tutoring to support high school algebra success. These combined efforts helped reinforce a schoolwide focus on academic growth, access, and readiness.

Implementation also revealed areas for continued refinement. Although many college and career readiness outcomes remained strong, CTE pathway completion remains below the long-term target, and staffing changes affected pathway participation in Art, Media, and Entertainment. College and career indicator performance improved in Year 2, but 11th-grade transfer students continue to present

challenges for CCI outcomes. In Action 3, participation in math interventions for students with disabilities increased, but achievement results remained mixed, indicating that increased access has not yet translated into consistent improvement across all measures.

Overall, Goal 1 was implemented successfully, with strong evidence of progress in college and career readiness structures, intervention systems, instructional alignment, and math support access, alongside clear direction for continued improvement in targeted academic outcomes.

Ongoing community input, use of real-time data, and strategic design will ensure implementation evolves to meet the needs of all learners—preparing every student for college, career, and life success.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The school spent materially more on action 1.1 related to increased expenditures supporting college and career readiness activities. The school also spent more for action 1.3 related to supporting students with disabilities.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Overall Assessment: Effective to Highly Effective

The actions under Goal 1 have been effective to highly effective in making progress toward the goal of improving academic achievement, college and career readiness, intervention systems, math support for students with disabilities, and articulation across grade spans. Year 2 results show strong performance in A–G completion, AP exam success, expansion of live CTE-aligned course access, access to instructional materials and standards, teacher articulation confidence, and several state assessment outcomes. At the same time, some metrics show forward progress but remain below long-term targets, particularly CTE pathway completion, graduation rate maintenance, student group math outcomes, and math achievement for students with disabilities.

K–12 Pathways, College and Career Readiness, and Postsecondary Preparation – Effective with Areas of Strong Performance

This action has been effective in expanding college and career readiness opportunities and pathways-based learning experiences for students. A–G completion increased from a baseline of 58.3% to 64.71% in Year 2, exceeding the Year 3 target of 63.3%. AP exam performance remained highly effective, with 87.5% of students attempting AP exams earning a score of 3 or higher, well above the target to maintain 70% or higher. CCI improved from 60.9% in Year 1 to 70.6% in Year 2, moving closer to the Year 3 target of 72% and exceeding the baseline. High school dropout also improved to 0%, meeting the goal to maintain 2% or less. In addition, live synchronous instruction directly aligned with CTE pathways expanded from a baseline of 79 offerings to 280, exceeding the Year 3 target of 200 class offerings. These results suggest that Sage Oak has been highly effective in expanding access to college- and career-aligned opportunities for students.

Implementation of college and career readiness was further supported through College and Career Week, career exploration opportunities, and future-planning experiences that helped students connect their strengths, interests, and coursework to postsecondary goals. These efforts helped reinforce the broader purpose of pathways-based learning even as completion metrics remain an area for continued growth.

At the same time, some related metrics show mixed results or continued need for refinement. CTE pathway completion increased from 1 student at baseline to 3 in Year 2, reflecting progress but remaining below the target of 6 students. Graduation rates, while substantially improved from baseline at 88.2%, remain slightly below the 90% target. Middle school dropout rose to .93%, which is above the target of 0%, though the overall student count may affect year-to-year fluctuation. These results suggest that this action is broadly effective, while continued attention is needed to pathway completion, graduation outcomes, and maintaining low dropout rates across grade spans.

Personalized, Data-Informed Multi-Tiered System of Support – Effective to Highly Effective

This action has been effective in strengthening access to challenging curriculum, intervention supports, and academic growth systems. Access to instructional materials and state standards remained at 100%, and perception data remained very strong, with parents, students, and staff continuing to report that students have access to a robust and challenging curriculum supported by resources across core content areas. Intervention outcomes also showed positive results. The percentage of intervention students growing one year or more in ELA increased from a baseline of 33% to 49% in Year 2, exceeding the target of 38%. In Math, intervention growth increased from a baseline of 48% to 53% in Year 2, meeting the Year 3 target. These results indicate that Sage Oak's intervention model is contributing positively to student growth.

State assessment proficiency data also reflected meaningful progress. CAASPP Math performance improved from 37.18% at baseline to 42.31% in Year 2, and CAASPP ELA improved from 55.49% at baseline to 57.31%. Socioeconomically disadvantaged students also showed strong gains in ELA, increasing from 40% at baseline to 49.45% in Year 2. Although socioeconomically disadvantaged students in Math improved from Year 1 to Year 2, they remain below baseline at 29.67% compared to 32.69%. I-Ready local assessment results provide additional evidence of progress under this action. In Math, the percentage of students performing at or above grade level increased from a baseline of 55% to 62% in Year 2, exceeding the school's three-year goal of 58%. In Reading, the percentage of students performing at or above grade level increased from a baseline of 63% to 66% in Year 2, meeting the school's three-year goal. These local assessment results reinforce that South's multi-tiered system of support is contributing to improved academic performance and meaningful growth from baseline to Year 2.

The California growth model provides important additional context for these results. In ELA, overall growth was 66.7% and rated Average. Hispanic students demonstrated Accelerated growth at 70.6%, while students with disabilities showed especially strong growth at 86.7%, rated Average within the model. In Math, overall growth was 57.1% and rated Moderate, indicating that Math remains an area needing additional focus. However, students with disabilities demonstrated Accelerated growth in Math at 66.7%, suggesting that supports for this group are beginning to show stronger results in state assessment growth. At the same time, several other student groups in Math, including socioeconomically disadvantaged students at 65.5%, Hispanic students at 54.4%, and students with two or more races at 64.7%, were rated Moderate, reinforcing the need for continued attention to consistent math acceleration across groups.

Overall, this action is effective, with strong evidence that Power Standards, ongoing core curriculum evaluation, the growing Program for Advanced and Gifted Education (PAGE), expanded intervention staffing, and high-dose tutoring are contributing to greater instructional consistency and academic growth. In addition, project-based learning was established and implemented this year for PAGE students, further enriching learning experiences through deeper engagement, critical thinking, and application of skills. The California growth model adds important context to these results, showing encouraging progress in ELA across multiple student groups and especially promising Math

growth for students with disabilities. At the same time, the data also make clear that broader Math outcomes still require continued refinement, targeted support, and sustained attention in the final year of the cycle.

Math Proficiency for Students with Disabilities – Effective with Strong Growth in One Measure and Continued Need for Refinement in Another

This action has been effective in increasing access to math interventions for students with disabilities and in improving one key state assessment outcome, though results remain mixed across measures. The percentage of students participating in math interventions increased from 40% at baseline to 55% in Year 2, showing strong progress toward the Year 3 target of 60%. CAASPP distance from standard in math for students with disabilities improved significantly from -86.8 at baseline to -43.3 in Year 2, indicating notable growth and meaningful progress toward the long-term goal. At the same time, i-Ready math achievement for students with disabilities in Tier 3 declined from 47% at baseline to 32% in Year 2, remaining below the Year 3 target of 44%. These results suggest that while the school has been effective in increasing participation and improving one important state measure, continued refinement is needed to strengthen day-to-day intervention outcomes and support more consistent math achievement for students with disabilities.

Articulation Across Grade Bands – Highly Effective

This action has been highly effective. Teacher confidence in articulating expectations and preparing students for the next grade span increased from a baseline of 78% to 97% in Year 2, exceeding the target of 90%. Notes from implementation indicate that examining data in PLCs and increasing cross-grade-level and grade-band collaboration have contributed to this growth. These results suggest that Sage Oak has made strong progress in developing a more unified and data-informed articulation process that supports smoother transitions across grade levels.

Conclusion

Overall, the actions under Goal 1 have been effective to highly effective in making progress toward the goal. The strongest areas of impact include A–G completion, AP success, expansion of live CTE-aligned coursework, access to curriculum and standards, intervention growth in ELA and Math, state assessment gains in several areas, and articulation across grade bands. The main areas requiring continued refinement are CTE pathway completion, graduation rate maintenance above target, socioeconomically disadvantaged student math performance, and math achievement for students with disabilities. Taken together, these results show that Goal 1 actions are producing meaningful positive outcomes and are building a strong foundation for continued growth in the final year of the cycle.Continued use of formative data, targeted professional development, and engagement with educational partners are essential to improving outcomes across all student groups in the remaining years of this LCAP cycle.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Based on reflection on prior practice, no major changes were made to the overall structure of Goal 1. The goal, metrics, target outcomes, and actions remain relevant and aligned with Sage Oak’s identified needs related to academic achievement, college and career readiness,

intervention, math support for students with disabilities, and articulation. However, Year 2 results indicate the importance of continuing to strengthen CTE pathway completion, graduation outcomes, math performance for socioeconomically disadvantaged students, and intervention effectiveness for students with disabilities.
For the coming year, Sage Oak will continue refining implementation by building on initiatives that have supported progress to date, including Power Standards, evaluation of core curriculum, expanded intervention staffing, and stronger articulation practices. Additionally, Sage Oak will continue refining implementation by expanding internal CTE capstone and internship opportunities, pursuing stronger AP access, increasing professional development for math and English learner instruction, and intensifying tiered supports for all students. The school will continue emphasizing targeted math support, data-informed PLC collaboration, and aligned instructional systems to accelerate progress in the areas that remain below target. These refinements are intended to preserve strong systems already in place while addressing the areas that require continued attention.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
1.1	Integration of Career, Community, and Life Skills	Integrate career, community, and life skills into comprehensive K-12 pathways. This action is dedicated to integrating career, community, and life skills within comprehensive K-12 pathways. It focuses on equipping students with the essential capabilities needed to navigate their future careers and community life successfully. By weaving these skills into the curriculum, we aim to ensure students are academically prepared and possess the practical skills required for the modern workforce and societal participation. This initiative prioritizes equitable opportunities for all students, emphasizing support for unduplicated students, to lay the groundwork for successful transitions to higher education and careers. Metrics for Effectiveness: 1.1 Completion of A-G Requirements: The total number of students successfully completing the A-G requirements, indicating readiness for university admission. 1.2 Career Technical Education (CTE) Pathway Completion: The quantity of students completing CTE pathways, reflecting vocational engagement and preparedness.	$8,940,911.00	Yes

Action #	Title	Description	Total Funds	Contributing
		1.3 Percentage of Students Achieving a Score of 3 or Higher on AP Exams: The proportion of students who attempt and succeed in Advanced Placement exams, demonstrating college-level academic proficiency. Percentage is reflective of participation as well as passing. 1.4 College and Career Indicator (CCI) Performance: Evaluation of students' readiness for post-secondary opportunities through the College and Career Indicator, assessing comprehensive preparedness for college and careers. 1.5 Graduation Rate Improvement: An increase in graduation rates, signifying the effectiveness of educational pathways in guiding students to complete their education. 1.6 Maintain Low Middle School Dropout Rates: A maintenance of low dropout rates at the middle school level, identifying early intervention points to maintain student engagement. 1.7 Maintain Low High School Dropout Rates: A maintenance of low dropout rates at the high school level, crucial for assessing the pathways' role in sustaining student engagement through graduation. 1.8 Expansion of Live Synchronous Instruction Courses Aligned with CTE Pathways: The expansion of live synchronous instruction courses that directly support CTE pathways, measuring the integration of career-oriented education within the academic curriculum. This action is crafted to not only achieve academic benchmarks but also to cultivate a comprehensive educational experience that thoroughly prepares students for both college and career trajectories.		
1.2	Refinement of Multi-Tiered System of Support	Refine a personalized, data-informed multi-tiered system of support. The focus of the services is on students from unduplicated and identified populations. This action aims to refine a personalized, data-informed multi-tiered system of support (MTSS) that caters to the unique needs of each student. By leveraging comprehensive data analysis and targeted interventions, we will enhance academic achievement and support emotional and social development. This approach is designed to ensure all students, especially	$798,858.00	Yes

Action #	Title	Description	Total Funds	Contributing
		those facing socio-economic challenges, receive the necessary support to excel academically. Metrics for Effectiveness: 1.9 Performance in iReady Assessments for ELA and Math: Proportion of students achieving at or above grade level in iReady assessments for English Language Arts (ELA) and Mathematics, indicating proficiency and readiness. 1.10 California Assessment of Student Performance and Progress (CAASPP) Achievement: Percentage of students who have met or exceeded standards in CAASPP assessments for Math and ELA, reflecting comprehensive academic achievement. 1.11 CAASPP Performance for Socio-Economically Disadvantaged (SED) Students: Percentage of socio-economically disadvantaged students meeting or exceeding CAASPP standards in Math and ELA, highlighting the effectiveness of targeted support. 1.12 Accessibility to Instructional Materials: Percentage of students with full access to necessary instructional materials, ensuring equity in learning resources. 1.13 Alignment with State Standards: Percentage of students whose education is fully aligned with state standards, promoting consistent educational quality. 1.14 Community Belief in Robust Curriculum: Proportion of parents, students, and teachers who believe that students have access to a challenging and comprehensive curriculum supported by resources that enable them to meet and exceed grade-level standards in core content areas. 1.15 LREBG Action Growth in ELA and Math Among Intervention This action has been revised to reflect the strategic use of Learning Recovery Emergency Block Grant (LREBG) and Title 1-A funds to expand staffing and improve teacher-to-student ratios within our intervention programs. By increasing instructional personnel, Sage Oak is able to provide more consistent, small-group, and individualized support for students receiving Tier 2 and Tier 3 interventions. This enhancement directly supports the academic progress of students performing below grade level, particularly those from unduplicated groups and students with disabilities.		

Action #	Title	Description	Total Funds	Contributing
		The goal of this action is to equip students with the skills and confidence needed to meet or exceed grade-level standards. By embedding additional instructional capacity through LREBG and Title 1-A funded staff, we aim to accelerate learning and ensure that a greater percentage of intervention students experience at least one year of academic growth annually. This action reinforces our commitment to equitable access to a robust, rigorous curriculum, supported by the necessary resources and targeted instruction to help all students thrive.		
1.3	Enhancement of Math Proficiency for Students with Disabilities	Improve math proficiency for students with disabilities by increasing the percentage of students with disabilities participating in math interventions. This action is dedicated to improving mathematics proficiency among students with disabilities by expanding their participation in specialized math intervention programs. Recognizing the unique challenges faced by these students, our targeted approach aims to elevate their math skills through personalized and adaptive learning strategies. By doing so, we endeavor to facilitate meaningful academic progress and reduce disparities in math achievement. Metrics for Effectiveness: 1.16 Participation Rate in Math Interventions: Increase in the percentage of students with disabilities participating in math intervention programs, aiming to ensure comprehensive access to support services tailored to their needs. 1.17 Increased iReady Math Achievement for Students with Disabilities (SWD): Measurement of the number of students with disabilities moving out of Tier 3 in iReady math assessments. Tier 3 represents students performing two or more years below grade level. While measuring achievement at or above grade level for this group may not be appropriate, monitoring their progress out of Tier 3 provides a meaningful indicator of improvement in math proficiency. 1.18 California Assessment of Student Performance and Progress (CAASPP) for SWD Math Achievement: Analysis of CAASPP math scores for students with disabilities to track advancements in state-standardized	$109,296.00	No

Action #	Title	Description	Total Funds	Contributing
		math achievement, with a focus on increasing the percentage of students meeting or exceeding math standards. This action underscores our commitment to inclusivity and equity in education by specifically addressing the needs of students with disabilities. Through targeted math interventions, we aim not only to improve math proficiency but also to foster a supportive learning environment that acknowledges and addresses the diverse needs of our student population.		
1.4	Unified Articulation Process Development	Create a unified, data-informed articulation process that smoothly transitions students through each grade band while integrating critical feedback from graduates. This action focuses on developing a unified, data-informed articulation process to ensure smooth transitions for students as they move through each grade band (e.g., from elementary to middle school, and middle school to high school). By integrating feedback from graduates and utilizing comprehensive data analysis, we aim to refine our educational pathways to better prepare students for the expectations and standards of their next academic phase. This process is designed to enhance communication between teachers across grade bands, ensure curriculum continuity, and address any potential gaps in student preparedness. Metrics for Effectiveness: 1.19 Teacher Preparedness for Student Articulation: The percentage of teachers who feel equipped to effectively prepare and transition their students to the next grade level band. This metric will be measured through targeted surveys asking teachers if they feel confident in their ability to communicate the expectations and standards of the next grade level, ensuring they have the resources and knowledge necessary to support their students' progression. By establishing a comprehensive articulation process that leverages both quantitative data and qualitative feedback from our educational community, this action aims to foster a more cohesive and supportive learning	$0.00	No

Action #	Title	Description	Total Funds	Contributing
		environment. It ensures that students are not only academically prepared for each transition but also that educators feel supported and equipped to guide them effectively through their educational journey.		

Goals and Actions

Goal

Goal #	Description	Type of Goal
2	Engagement: Fostering a Supportive and Engaging Learning Environment In order to enhance student, parent, and staff engagement, we will establish an environment that fosters connectedness and professional growth.	Broad Goal

State Priorities addressed by this goal.

Priority 1: Basic (Conditions of Learning)
Priority 3: Parental Involvement (Engagement)
Priority 5: Pupil Engagement (Engagement)
Priority 6: School Climate (Engagement)
Priority 7: Course Access (Conditions of Learning)
Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

Building on Sage Oak's strategic commitment, Goal 2 aims to cultivate a supportive and engaging learning environment by emphasizing the well-being and professional growth of our staff, alongside fostering stronger connections within our school community. This goal is rooted in the belief that the success of our educational mission is intertwined with the development and satisfaction of our educators and staff. By investing in comprehensive professional development, mentorship programs, and creating a nurturing work environment, we aspire to empower our educators. This empowerment is expected to cascade, enhancing the educational experience for students and fostering a sense of belonging and community alignment with Sage Oak's mission and vision.

Sage Oak's efforts are influenced by feedback from the WASC visiting committee and include specific action steps aimed at increasing opportunities for parent and student engagement, developing purposeful professional growth pathways for staff, enhancing live instruction through targeted professional development, and establishing a robust system for social and emotional support. These targeted actions demonstrate Sage Oak's balanced approach to educational excellence, ensuring every member of our community is supported to thrive.

Furthermore, these initiatives directly contribute to increased or improved services for our unduplicated student populations, including socio-economically disadvantaged students, English learners, foster youth, and students with disabilities. By creating a more engaging, supportive, and well-resourced learning environment, we aim to elevate the educational outcomes and well-being of these students, ensuring that our programs and resources are tailored to meet their specific needs and challenges. This aligns with our objectives to deliver equitable, high-quality educational opportunities, making significant strides in supporting all students, particularly those who require additional assistance, to achieve success and reach their full potential.

Through increased staffing funded by the Learning Recovery Emergency Block Grant (LREBG), Sage Oak is expanding access to social-emotional supports as outlined in Goal 2, Action 4. This targeted investment strengthens our ability to meet the diverse needs of all students, supporting their academic growth, social-emotional well-being, and readiness for future college and career pathways. This approach reflects Sage Oak's continued commitment to equitable, high-quality educational opportunities for every learner.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
2.1	Maintenance of Positive Community Engagement Perception % of parents, students, and staff that believe Sage Oak makes a significant effort to foster community engagement	Parents- 99% Students- 99% Staff- 100% Source: Internal 23-24	Parents - 88% Students - 89% Staff - 97%	Parents - 94% Students - 92% Staff - 96%	Parents- 90% Students- 90% Staff- 90%	Parents -5% Students-7% Staff -4%
2.2	Maintain 100% Credentialed Teachers % of credentialed teachers	100% Source: Internal 23-24	100%	100%	100%	0
2.3	Maintenance of High Attendance Rate % of school attendance rates (ADA)	99.7% Source: Internal 23-24	99.5%	99.3%	98% or higher	-.4%
2.4	Maintenance of Low Chronic Absenteeism	2% Source: CA Dashboard 23-24	.3%	2.1%	Below 3%	.1%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	% of chronic absenteeism					
2.5	Maintenance of Low Suspension and Expulsion Rates % suspension and expulsion rates	Suspension- 0% Expulsion- 0% Source: CA Dashboard and Dataquest 22-23	Suspension 0% Expulsion 0%	Suspension 0% Expulsion 0%	Suspension- 0% Expulsion- 0%	Suspension 0 Expulsion 0
2.6	Maintain Positive Connection to School's Mission % of the parents, students and staff that feel connected to the school's mission	Parents- 97% Students- 63% Staff- 96% Source: Internal 23-24	Parents - 89% Students - 91% Staff -95%	Parents - 91% Students - 85% Staff - 98%	Parents- 90% Students- 90% Staff- 90%	Parents -6% Students 22% Staff 2%
2.7	Increased Student Retention Rate student retention rate	67% Source: Internal 22-23	60%	67%	75%	0%
2.8	Maintain Positive School Climate % of the parents, students and staff that feel the school priorities safety, value and respect	Parents -99% Students -97% Staff -97% Source: Internal 23-24	Parents -98% Students - 98% Staff -99%	Parents - 98% Students - 97% Staff - 98%	Parents -90% Students - 90% Staff -90%	Parents -1% Students 0% Staff 1%
2.9	Confidence and Integration of New Strategies % of staff involved in the Leadership Pathway	100% Source: Internal 23-24	100%	90%	100%	-10%

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Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	reporting increased confidence in their ability to embrace and apply new strategies within their roles					
2.10	Increased Retention Rates of Participating Staff retention rates of staff members who have participated in the professional development pathways	72% Source: Internal 23-24	83%	88%	80%	16%
2.11	Expansion of Professional Development Opportunities # of professional development opportunities offered to staff, focusing on live instruction	4 Source: Internal 23-24	6	20	10	16
2.12	Improved Staff Confidence in Job Performance % of staff who believe they are well-equipped by Sage Oak to perform their roles effectively	96% Source: Internal 23-24	97%	97%	90% or higher	1%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
2.13	Increased Awareness of Socio-Emotional Resources % of parents, students, and staff that report feeling informed about the social and emotional resources provided by Sage Oak	Parents- 86% Students- 78% Staff- 93% Source: Internal 23-24	Parents -94% Students -90% Staff -94%	Parents -92% Students -91% Staff -95%	Parents- 90% Students- 90% Staff- 90%	Parents 6% Students 13% Staff 2%
2.14	Expansion of Synchronous Support Opportunities # of synchronous support groups or classes with counselors	23 Source: Internal 23-24	66	238	29	215

Goal Analysis [2025-26]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Engagement: Fostering a Supportive and Engaging Learning Environment

During the 2025–26 school year, Sage Oak continued implementation of Goal 2 with a focus on strengthening student, parent, and staff engagement through community connection, professional growth, live instruction, and social-emotional supports. Implementation remained aligned with the planned actions and reflected the school's continued commitment to fostering a supportive and engaging learning environment. Core efforts included maintaining meaningful opportunities for involvement and input, sustaining strong communication with educational partners, and continuing to build systems that support both student belonging and staff effectiveness. Additional efforts included supporting staff through purposeful pathways for growth and professional development, strengthening live synchronous instruction, and increasing awareness of and access to social-emotional supports for students and families. Sage Oak also used Learning Recovery Emergency Block Grant funding to help sustain and expand counseling-related supports and real-time student services.

A major success in implementation was the school's continued work to build a connected and supportive culture through communication, engagement opportunities, and student support systems while carrying out all four planned actions in a coordinated way. Community connection efforts included advisory groups, events, communication structures, and ongoing opportunities for feedback. Professional growth efforts included leadership pathways, program-specific support, and an expanded professional development plan for live instruction that incorporated staff feedback and practical application. Staff also engaged in the Professional Development Passport, a personalized and aligned menu of learning opportunities that allowed teachers and staff to deepen skills in areas most relevant to their roles. Feedback indicated that staff appreciated the opportunity to grow professionally and further develop their practice. This emphasis on staff support and development was also reflected in Sage Oak receiving Top Workplaces recognition, highlighting the school's success in creating a culture where staff feel valued and supported. Social-emotional support systems also remained a strong area of implementation through continued communication about available resources and access to shared counseling groups, courses, and supports available across the Sage Oak system. These combined efforts helped reinforce a school culture focused on connection, responsiveness, and support across programs and grade spans.

Implementation also revealed areas for continued refinement. Although Sage Oak maintained strong overall engagement and support systems, student connection to the school's mission remained lower than parent and staff results, indicating a need for continued attention to student belonging, relevance, and voice. In response, Sage Oak is increasing intentional communication around student learning outcomes and encouraging teachers to connect students to enrichment courses aligned with their strengths and interests. Student retention also improved meaningfully from baseline and from the prior year, but it remains below the three-year target. In response, the school will continue strengthening opportunities that connect students more deeply to their learning experience, including flexibility in curriculum options, access to engaging community activities and field trips, and continued communication about supports and pathways available to students. Staff and family feedback also reinforced the importance of keeping supports practical, responsive, and accessible, particularly in Riverside and San Diego.

Overall, Goal 2 was implemented successfully, with strong evidence of progress in school climate, attendance, staff development, and awareness of social-emotional supports, alongside clear direction for continued improvement in student connection and retention.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The school spent materially more on action 2.1 related to budgeted positions being filled and expenditures supporting student engagement activities, on action 2.3 related to student materials and supplies, and 2.4 related to increased expenditures for social and emotional support. The school spent materially less on action 2.2 related to professional development.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Overall Assessment: Effective to Highly Effective

The actions under Goal 2 have been effective to highly effective in making progress toward the goal of fostering a supportive and engaging learning environment. Year 2 results show strong performance in opportunities for involvement, school climate, attendance, professional

development, and awareness of social-emotional supports. At the same time, student connection to mission and student retention remain important areas for continued refinement in the final year of the cycle.

Enhancing Community Connection Opportunities – Highly Effective

This action has been highly effective in maintaining strong opportunities for involvement and input across the school community. In Year 2, 93% of parents, 93% of students, and 96% of staff reported that Sage Oak makes a significant effort to provide opportunities for involvement and input. School climate was also a clear area of strength, with 98% of parents, 98% of students, and 98% of staff reporting that the school prioritizes a safe, respectful, and supportive learning environment. Attendance remained very strong at 99.3%, and chronic absenteeism remained low at 2.1%, meeting the desired outcome of less than 3%. These outcomes suggest that efforts to build a connected and supportive environment are having a meaningful positive impact on the school community.

Climate Survey Themes and Continued Refinement – Highly Effective with Clear Next Steps

Climate survey feedback also helps explain why this action has been effective and where it can continue to be strengthened. Students emphasized the value of supportive and respectful teaching practices and expressed a desire for flexible curriculum options that allow them to tailor learning to their interests, level, and pace. Students also identified the need for stronger awareness of social-emotional and mental health resources, more field trips and connection-building opportunities, and increased academic rigor across courses. Parent feedback reinforced many of these same themes, including the importance of continued strong parent involvement opportunities, flexible curriculum choice, stronger communication about available social-emotional supports, expanded community activities and resources, and increased academic rigor with a clearer college-prep pathway. Taken together, these results indicate that Sage Oak has built a strong foundation in community connection and school climate, while also identifying clear next steps to further strengthen relevance, rigor, and access for students and families.

Connection to Mission and Student Retention – Effective with Forward Progress

Connection to the school's mission showed mixed results in Year 2. Parent connection remained strong at 91%, and staff connection was especially strong at 98%, while student connection was 86%. This suggests that students may benefit from additional opportunities to see how their learning connects to their goals, interests, and future pathways. Student retention increased meaningfully from a 60% baseline to 67%, demonstrating clear forward progress. However, because retention remains below the three-year target of 75%, this metric is best described as effective with forward progress rather than highly effective. These results suggest that the school's systems are supporting persistence, but that continued focus on belonging, engagement, and relevance will be important moving forward.

Professional Growth Pathways – Effective with Forward Progress

Professional Growth Pathways have been effective with forward progress. In Year 2, 90% of staff participating in leadership pathways reported confidence in implementing new strategies. While this reflects an opportunity for continued strengthening, it still indicates a strong level of confidence and positive impact. At the same time, retention among staff participating in leadership pathways increased to 88%, demonstrating that the program continues to support staff development and long-term investment in leadership capacity. These results

suggest that the action remains effective, while also highlighting the importance of continued coaching, follow-up support, and implementation structures that help staff apply new learning in practice.

Improved Professional Development for Live Instruction – Highly Effective

Improved Professional Development for Live Instruction has been highly effective. The number of professional development opportunities focused on live instruction rose to 20 in Year 2, reflecting a strong investment in instructional excellence and significantly expanding support for teachers. These sessions were grounded in evidence-based practices and focused on strengthening live synchronous instruction through high-impact strategies, educational technology, and AI integration. Key themes included clarifying learning goals, strengthening classroom discussion, and using instructional tools such as Nearpod, Classkick, Canva, MagicSchool AI, Kami, Gimkit, and Zoom to improve engagement, formative assessment, differentiation, and efficiency. Staff feedback consistently showed that teachers valued hands-on learning, collaboration with colleagues, and practical strategies they could apply immediately in their classes.

Professional Development Passport and Refinement Through Staff Feedback – Highly Effective

Sage Oak's broader professional learning system was also highly effective. The Professional Development Passport provided staff with a personalized and aligned menu of learning opportunities, allowing teachers and staff to deepen skills in areas most relevant to their roles and professional goals. Feedback indicated that staff appreciated the opportunity to grow professionally and further hone their practice. The professional development plan also demonstrates that Sage Oak refined sessions in response to staff feedback throughout the year, making the training increasingly targeted and relevant. Teachers consistently emphasized the value of breakout sessions, program-specific support, and opportunities to explore tools from both teacher and student perspectives. Feedback across sessions showed high levels of relevance and usefulness, and 97% of staff reported feeling well-equipped based on the professional development they received during the year. These results indicate that Sage Oak's investment in professional learning is strengthening staff capacity and supporting more effective instruction across programs.

Development of Social and Emotional Support Systems – Highly Effective

Development of Social and Emotional Support Systems has been highly effective. In Year 2, 95% of parents, 94% of students, and 95% of staff reported being informed about available social-emotional resources, indicating strong awareness across stakeholder groups. In addition, synchronous counseling groups and classes expanded significantly, reaching 238 sessions this year with consistently strong student engagement. Popular offerings included executive functioning support through Life Hacks at the high school level and Brain Boss for students in grades 3–8. AVID was also successfully introduced for middle school students, further strengthening support in organization, study skills, and college readiness. These efforts helped ensure that students and families knew how to access support when needed and contributed to a more responsive and supportive learning environment.

Conclusion

Overall, the specific actions under Goal 2 have been effective to highly effective in making progress toward the goal. The strongest areas of impact include opportunities for involvement, school climate, attendance, professional development, and awareness of social-emotional supports. Student retention shows clear forward progress, while student connection to mission remains an area for continued refinement.

The addition of staff-centered successes, including Top Workplace recognition and the strong response to the Professional Development Passport, further reinforces that Sage Oak is building a culture where staff feel supported, valued, and equipped to grow. Taken together, these results show that Goal 2 actions are producing meaningful positive outcomes and are building a strong foundation for continued growth in the final year of the cycle. Taken together, these results show that Goal 2 actions are producing meaningful positive outcomes and are building a strong foundation for continued growth in the final year of the cycle.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Based on reflection on prior practice, no major changes were made to the overall structure of Goal 2. The goal, metrics, and actions remain relevant and aligned with Sage Oak's identified needs. However, Year 2 results indicate the importance of continuing to strengthen student connection to the school's mission and improving student retention. The school will continue refining implementation in ways that increase relevance and belonging for students, including maintaining flexibility in curriculum options, expanding community-building opportunities, and strengthening communication about available supports and student pathways.
For the coming year, Sage Oak will continue to build on the strong foundation already established in school climate, attendance, staff growth, and awareness of social-emotional supports. The school will maintain the current actions while refining implementation to ensure students and families within Sage Oak have meaningful access to engagement opportunities, support resources, and responsive instruction. These refinements are intended to preserve strong systems already in place while addressing areas that remain below target.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
2.1	Enhancing Community Connection Opportunities	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. This action is dedicated to increasing opportunities for meaningful engagement among parents, students, and school leadership. By fostering a deeper sense of community and ensuring alignment with the school's mission and vision, we aim to create an inclusive environment that supports professional growth and student success. Initiatives will include structured forums for feedback, engagement events, and clear	$755,727.00	Yes

Action #	Title	Description	Total Funds	Contributing
		communication channels that encourage active participation from all members of our school community. Metrics for Effectiveness: 2.1 Community Engagement Perception: Measurement of the community's perception regarding the school's efforts to provide opportunities for involvement and input. This will be assessed through surveys asking if participants believe Sage Oak makes a significant effort to foster community engagement. 2.2 Retention of Credentialed Teachers: Maintaining a 100% rate of credentialed teachers, ensuring that students have access to qualified and dedicated professionals. 2.3 Attendance Rate Stability: Maintenance of school attendance rates at optimal levels, reflecting student engagement and a supportive learning environment. 2.4 Low Chronic Absenteeism: Sustaining low rates of chronic absenteeism, indicating an engaging and welcoming school climate that motivates regular attendance. 2.5 Low Suspension and Expulsion Rates: Keeping suspension and expulsion rates minimal, demonstrating effective behavior management and a positive school culture. 2.6 Connection to School’s Mission: Proportion of the school community that feels connected to the school’s mission of empowering students, as measured by targeted surveys. This metric gauges the alignment of community values with the school’s objectives. 2.7 Student Retention Rate Improvement: An increase in the student retention rate, indicating success in creating a supportive and engaging environment that encourages students to continue their education at Sage Oak. 2.8 School Climate: Proportion of the school community that feels safe, respected and values, as measured by targeted surveys. This metric gauges the alignment of community values with the school’s objectives. Through these targeted actions and metrics, we aim to not only enhance the sense of community and engagement within our school but also to ensure that our educational environment is conducive to professional growth, student success, and sustained participation from our entire school community.		

Action #	Title	Description	Total Funds	Contributing
2.2	Development of Professional Growth Pathways	Develop purposeful pathways for growth and opportunities for professional development. This action focuses on creating purposeful pathways for professional growth, offering expansive opportunities for all staff members to develop. By initiating comprehensive leadership and professional development programs, we aim to equip our staff with the skills and confidence necessary to innovate and enhance their respective practices across the board. This initiative is designed to cultivate a culture that values continuous learning, adaptability, and professional excellence, contributing significantly to the overall effectiveness and sustainability of our educational environment. Metrics for Effectiveness: 2.9 Confidence and Integration of New Strategies: The proportion of staff involved in the Leadership Pathway reporting increased confidence in their ability to embrace and apply new strategies within their roles. This will be assessed through surveys that inquire about their readiness to incorporate these strategies into future practices, reflecting the professional development programs' impact on enhancing staff capabilities. 2.10 Retention Rates of Participating Staff: The retention rates of staff members who have participated in the professional development pathways will be closely monitored. A positive trend in these rates would indicate the success of the development opportunities in promoting job satisfaction, personal growth, and a strong commitment to the institution. This action underscores our dedication to fostering professional growth and development across all staff levels, enhancing our school's capacity to provide a high-quality, supportive, and engaging learning environment for all community members.	$307,360.00	Yes

Action #	Title	Description	Total Funds	Contributing
2.3	Enhancement of Professional Development for Live Instruction	Increase professional development for live instruction. This action targets the expansion of professional development opportunities tailored to live instruction, aiming to empower our staff with the skills and techniques necessary for dynamic and effective real-time teaching. By providing a diverse array of training sessions, workshops, and seminars focused on live instructional strategies, we are committed to ensuring that all staff members feel confident and well-prepared to engage students in a live setting. This initiative is designed to elevate the quality of live instruction, ensuring that our educational delivery is both impactful and engaging. Metrics for Effectiveness: 2.11 Expansion of Professional Development Opportunities: Tracking the increase in professional development opportunities offered to staff, focusing on live instruction. This metric will encompass school-created programs and external training opportunities included in our professional development portfolio. 2.12 Staff Confidence in Job Performance: The percentage of staff who believe they are well-equipped by Sage Oak to perform their roles effectively, particularly in the context of live instruction, based on the professional development received. This will be measured through surveys assessing staff perceptions of their preparedness and the adequacy of professional development support provided by the school. Through this targeted approach to professional development, we aim to not only enhance the effectiveness of live instruction but also to foster a culture of continuous learning and adaptability among our staff. This action reaffirms our commitment to supporting professional excellence and student success in every live instructional encounter.	$57,310.00	Yes
2.4	Development of Social and Emotional Support Systems	Develop a system to increase access and consistency for social and emotional resources and interventions. This action is dedicated to developing a comprehensive system designed to increase access to and consistency of social and emotional resources	$0.00	Yes

Action #	Title	Description	Total Funds	Contributing
		and interventions for our school community. Recognizing the critical importance of social and emotional well-being in educational success, we aim to ensure that students, parents, and teachers are well-informed and have easy access to the support services they need. Through this initiative, we will enhance our existing resources, introduce new interventions, and expand synchronous support opportunities, such as groups or classes led by counselors, to address the diverse needs of our community effectively. Additionally, this action has been revised to reflect the strategic use of Learning Recovery Emergency Block Grant (LREBG) funds to expand staffing and improve teacher-to-student ratios within our counseling offerings. Metrics for Effectiveness: 2.13 Awareness of Socio-Emotional Resources: The percentage of parents, students, and teachers that report feeling informed about the social and emotional resources provided by Sage Oak. This measure will assess the effectiveness of our communication strategies and the accessibility of our resources. 2.14 Expansion of Synchronous Support Opportunities: The increase in the number of synchronous support groups or classes with counselors, reflecting our commitment to providing real-time, interactive support sessions that cater to the emotional and social needs of our students. By implementing this action, we aim to create a nurturing and supportive environment that prioritizes the social and emotional well-being of our students. This comprehensive support system will not only address immediate needs but also contribute to the long-term resilience and success of our school community.		

Goals and Actions

Goal

Goal #	Description	Type of Goal
3	Conditions of Learning: Efficient Operations with a Focus on Sustainability Leverage technologies, specifically Artificial Intelligence, 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.	Broad Goal

State Priorities addressed by this goal.

Priority 1: Basic (Conditions of Learning)
Priority 2: State Standards (Conditions of Learning)
Priority 4: Pupil Achievement (Pupil Outcomes)
Priority 7: Course Access (Conditions of Learning)
Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

Understanding the importance of future-proofing its educational approach, Sage Oak integrates robust systems that prioritize sustainability and efficiency into its strategic plan. This initiative focuses on streamlining operations, optimizing resources, and adopting sustainable practices, aligning with the school's mission and values. By leveraging Artificial Intelligence and other advanced technologies, Sage Oak aims to provide personalized learning pathways, ensuring education is more accessible, engaging, and effective for students. This forward-thinking approach prepares the Sage Oak community for a rapidly evolving educational landscape, embodying the school's commitment to innovation and excellence.

Sage Oak's current staff-to-student ratio of 13:1 highlights our dedicated investment in staffing to ensure personalized learning. With efforts to enhance operational efficiency, we anticipate a more optimized staff-to-student ratio. This adjustment will enable us to extend our educational reach without compromising the quality of instruction. By streamlining administrative tasks, teachers can dedicate more attention to enriching student interactions, further improving the educational experience. This strategic approach ensures that resources are maximized for the direct benefit of our students, aligning with our mission to provide high-quality, focused education.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
3.1	Staff to Student Ratio Improvement staff to student ratio	13:1 Source: Internal 22-23	13:1	13:1	19:1	0
3.2	Improved Work Efficiency and Satisfaction % of staff reporting noticeable improvements in work efficiency and satisfaction	93% Source: Internal 23-24	92%	96%	90% or higher	2%
3.3	Increased Staff Confidence in Using AI Tools % of staff reporting confidence in their ability to use AI tools to improve learning outcomes	79% Source: 23-24	91%	95%	90% or higher	16%

Goal Analysis [2025-26]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Efficiency and Innovation: Building Sustainable Systems Through Technology and AI

During the 2025–26 school year, Goal 3 focused on strengthening operational efficiency and long-term sustainability through the thoughtful integration of technology and Artificial Intelligence (AI). Grounded in Sage Oak's strategic plan, implementation emphasized streamlining operational systems, improving staff efficiency, and increasing staff capacity to use AI tools in ways that support teaching, learning, and responsive service delivery. The goal remained centered on technology optimization for enhanced operations and AI-driven personalized learning implementation, and implementation remained closely aligned with the original LCAP plan.

Throughout the year, Sage Oak continued evaluating and refining internal systems to improve efficiency and reduce time spent on routine operational processes. Technology was used to streamline practices such as scheduling, attendance-related systems, form processing, survey analysis, and instructional preparation, helping reduce manual workload and improve consistency across departments. At the same time, staff continued building familiarity and confidence in using AI and educational technology to support lesson planning, progress monitoring, assessment feedback, and other personalized instructional applications. These efforts reflected Sage Oak's continued investment in practical, meaningful, and instructionally relevant AI integration.

A major part of this year's work was Sage Oak's collaboration with an external consultant to support the development of the school's AI policy. As part of this process, the consultant engaged with individuals across the organization who are involved with AI, conducted an AI SWOT analysis, and provided a report outlining strengths, weaknesses, opportunities, and threats related to Sage Oak's current and future use of AI. This approach helped the school better understand its current landscape, identify areas for growth and caution, and take a more strategic and informed approach to long-term AI implementation.

Implementation of Goal 3 led Sage Oak to refine how we define efficiency. Rather than increasing the overall student to staff ratio from 13:1 to 19:1, Sage Oak maintained the 13:1 ratio and shifted staffing and resources toward direct student support. Over the past year, the school increased instructional staffing and reduced the proportion of non instructional roles through improved systems, technology, and AI supported efficiencies. This shift strengthened teaching, intervention, counseling, planning, and other student facing services preserving the human connection central to Sage Oak's approach. As a result, progress under Goal 3 is reflected not in a higher overall ratio, but in a greater percentage of staff directly serving students and supporting student outcomes.

While implementation was strong overall, the school also identified areas for continued refinement. Although staff readiness and workflow efficiency showed positive growth, the direct impact of AI-supported personalization on student academic outcomes is still developing and will require continued monitoring over time. Sage Oak also continued refining cross-departmental alignment so that technology systems remain scalable, sustainable, and responsive to the school's evolving needs.

Overall, Goal 3 was implemented successfully and remained closely aligned with the planned actions. The strongest areas of implementation included workflow efficiency, staff readiness to use AI tools, the strategic development of an AI policy framework, and the continued creation of scalable systems that support both operations and instruction. At the same time, the school continues to refine how long-term outcomes are measured, particularly in relation to organizational capacity and the instructional impact of AI-supported personalization. Taken together, these results show that Goal 3 actions are producing meaningful progress and establishing a strong foundation for continued growth in the final year of the cycle.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The school spent materially more on actions 3.1 and 3.2 related to increased expenditures for enhancing the schools technology operations and development for artificial intelligence personalized learning.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Overall Assessment: Effective to Highly Effective

The actions under Goal 3 have been effective to highly effective in making progress toward the goal of increasing operational efficiency, building staff capacity, and establishing more sustainable systems through the use of technology and AI. The strongest evidence of progress is seen in staff-reported efficiency, satisfaction, and confidence in using AI tools. At the same time, some long-term outcomes, particularly the staff-to-student ratio and the direct impact of AI-supported personalization on student learning, are still developing and will require continued refinement and monitoring.

Technology Optimization for Enhanced Operations – Highly Effective

This action has been highly effective in improving workflow efficiency and staff capacity. Leadership staff reporting noticeable improvements in work efficiency and satisfaction increased to 96% in Year 2, exceeding the target of 90% or higher. These results suggest that efforts to streamline operational systems, automate repeatable processes, and improve technology-supported workflows are having a positive effect on day-to-day practice. Rather than viewing the total staff-to-student ratio solely as a metric to increase, Sage Oak's implementation of Goal 3 clarified that the more meaningful priority is ensuring that staffing structures directly support student outcomes. During this cycle, the school intentionally increased instructional spending and prioritized shifting staffing and resources toward direct instructional and student-facing supports. As a result, Sage Oak has identified the 13:1 staff-to-student ratio as an important metric to maintain in order to best evaluate effectiveness in student outcomes while continuing to build efficiency through improved systems and technology. This suggests that progress under this action is better reflected in increased staff capacity, stronger instructional investment, and improved service delivery than in movement toward a higher ratio alone.

AI-Driven Personalized Learning Implementation – Highly Effective

This action has also been highly effective in increasing staff readiness to use AI as a tool to support teaching and learning. Staff confidence in using AI tools increased from a baseline of 79% to 95% in Year 2, surpassing the target of 90%. These gains indicate meaningful growth in staff comfort and skill in using AI for lesson planning, assessment feedback, progress monitoring, and other instructional supports. In addition, Sage Oak's collaboration with an external consultant to support development of the school's AI policy strengthened this work by helping the organization take a more strategic and informed approach to implementation. Through stakeholder engagement, an AI SWOT analysis, and a report identifying strengths, weaknesses, opportunities, and threats, the school was able to better understand its current landscape and build a stronger foundation for responsible and sustainable AI integration.

Long-Term Impact and Continued Refinement – Effective with Forward Progress

While Goal 3 actions are clearly producing positive results, some longer-term outcomes are still evolving. The most important learning from implementation is that efficiency at Sage Oak is better understood through increased organizational capacity and stronger alignment of staffing to student needs than through a change in the total staff-to-student ratio by itself. The school's ability to maintain a 13:1 ratio while shifting resources toward instruction and direct student support reflects meaningful progress in this area. At the same time, the measurable effect of AI-supported personalization on student academic outcomes remains more difficult to isolate than staff-capacity and workflow measures. These areas are best described as effective with forward progress, as the systems, staff readiness, and implementation

conditions are strengthening, even if some broader impacts will take longer to measure. Sage Oak remains committed to a student-centered approach in which technology and AI are used to amplify staff effectiveness rather than replace relationships or direct support.

Conclusion

Overall, the actions under Goal 3 have been effective to highly effective in making progress toward the goal. The clearest areas of impact include improved operational efficiency, stronger staff confidence in using AI tools, the strategic development of an AI policy framework, and a more intentional alignment of staffing and instructional investment to support student outcomes. The main area requiring continued refinement is how the school measures long-term impact, particularly the academic effect of AI-supported personalization. Taken together, these results show that Goal 3 actions are strengthening Sage Oak's operational foundation while preserving its commitment to a high-touch, student-centered model of service.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Based on reflection on prior practice, no changes will be made to the planned goal, metrics, target outcomes, or actions for Goal 3. The goal remains relevant and aligned with Sage Oak's ongoing priorities related to operational efficiency, sustainability, and the thoughtful integration of technology and Artificial Intelligence (AI). Implementation to date suggests that the current goal structure continues to support the school's efforts to strengthen systems, increase staff capacity, and improve service delivery while maintaining a high-touch, student-centered model.

For the coming year, Sage Oak will continue refining implementation of Goal 3 by focusing on systems that increase staff capacity and service efficiency while preserving student-centered supports. The school will prioritize automation of routine tasks, clearer workflow alignment across departments, and expanded practical AI use cases so that technology amplifies staff effectiveness rather than replacing human interaction. These refinements are intended to build on the progress already made in workflow efficiency and staff confidence with AI tools while continuing to strengthen long-term sustainability and organizational capacity.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing
3.1	Technology Optimization for Enhanced Operations	Evaluate, integrate, and optimize technology to streamline and automate operational processes and procedures.	$709,577.00	No

Action #	Title	Description	Total Funds	Contributing
		This action focuses on the strategic evaluation, integration, and optimization of technology systems to streamline operational processes, reduce inefficiencies, and strengthen long-term organizational sustainability. With a particular emphasis on Artificial Intelligence (AI), Sage Oak will continue identifying opportunities to automate routine and repetitive tasks, improve internal workflows, and enhance the efficiency of day-to-day operations across departments. This includes the continued use of technology to support scheduling, data analysis, communication systems, survey processing, form management, and other operational procedures that can be improved through automation and streamlined design. Through this work, Sage Oak seeks not to reduce staffing, but to increase the school's ability to do more with the staff it has while preserving a high-touch, student-centered model. As the school has expanded key people-centered supports, including IT, counseling for SEL and planning, and intervention services, technology serves as a tool to strengthen staff capacity and allow personnel to devote more time to direct student and family support. By refining systems and reducing manual workload, this action supports more efficient use of resources while maintaining the relationships and personalized support that are central to Sage Oak's educational model. Metrics for Effectiveness: 3.1 Staff-to-Student Ratio Improvement: Monitoring changes in the staff-to-student ratio as one indicator of increased organizational capacity and more efficient distribution of resources over time. While the school remains committed to maintaining strong student supports, this metric reflects the long-term goal of improving operational scalability through more efficient systems and workflows. 3.2 Work Efficiency and Satisfaction: The percentage of staff reporting noticeable improvements in work efficiency and satisfaction following the implementation of new technology solutions. This metric will continue to be assessed through internal surveys designed to capture staff perceptions of how technology improvements support their daily work and overall effectiveness.		

Action #	Title	Description	Total Funds	Contributing
		Through this initiative, Sage Oak aims to build a more streamlined, efficient, and sustainable operational framework that supports staff effectiveness, protects people-centered services, and enhances the conditions of learning for students and staff.		
3.2	AI-Driven Personalized Learning Implementation	Implement AI-driven personalized learning strategies to maximize student learning. This action focuses on the thoughtful implementation of Artificial Intelligence (AI)-supported strategies to strengthen teaching, learning, and personalized academic support for students. Sage Oak will continue building staff capacity to use AI tools in ways that enhance instructional planning, support differentiated learning, improve progress monitoring, and increase responsiveness to student needs. AI will be used to help staff develop more adaptive and efficient approaches to instruction while maintaining the school's commitment to personalized, relationship-based learning. This work is grounded in Sage Oak's belief that AI should amplify, not replace, the work of educators and support staff. Professional learning and guided implementation will continue to help staff use AI responsibly and effectively in areas such as lesson design, feedback, resource development, and instructional support. As staff confidence and competence continue to grow, AI-supported practices will help create more flexible and engaging learning experiences for students while increasing staff efficiency and instructional capacity. Metrics for Effectiveness: 3.3 Staff Confidence in Using AI Tools: The percentage of staff reporting confidence in their ability to use AI tools to improve learning outcomes, based on training and implementation support received. This metric will assess the effectiveness of professional development efforts in preparing staff to use AI as a practical and responsible tool for personalized learning and instructional improvement.	$39,965.00	Yes

Action #	Title	Description	Total Funds	Contributing
		Through the continued implementation of AI-supported personalized learning strategies, Sage Oak aims to create a more engaging, inclusive, and effective educational environment that responds to diverse student needs while supporting academic growth and operational efficiency.		

Goals and Actions

Goal

Goal #	Description	Type of Goal
4		

State Priorities addressed by this goal.

An explanation of why the LEA has developed this goal.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline

Goal Analysis [2025-26]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing

Goals and Actions

Goal

Goal #	Description	Type of Goal
5		

State Priorities addressed by this goal.

An explanation of why the LEA has developed this goal.

Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline

Goal Analysis [2025-26]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Actions

Action #	Title	Description	Total Funds	Contributing

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2026-27]

Total Projected LCFF Supplemental and/or Concentration Grants	Projected Additional 15 percent LCFF Concentration Grant
$$845,122	$0

Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
9.336%	0.000%	$0.00	9.336%

The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.

Required Descriptions

LEA-wide and Schoolwide Actions

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
1.1	**Action:** Integration of Career, Community, and Life Skills **Need:** All students, including unduplicated students, require enhanced access to career, community, and life skills education due to historical inequities and limited access to external resources.	This action provides enhanced access to career, community, and life skills education through dedicated synchronous courses and counseling supports (Action 1.1). While offered LEA-wide, the curriculum and support are intentionally designed with differentiated content and targeted outreach to ensure unduplicated students, who historically have less access to these resources, receive services that are increased in intensity and improved in quality and relevance compared to a universal offering without these targeted elements.	Completion of A-G Requirements, Career Technical Education (CTE) Pathway Completion, Percentage of Students Achieving a Score of 3 or Higher on AP Exams.

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
	Scope: LEA-wide	This is the most effective approach to ensure equitable access and outcomes across the geographically diverse LEA.	
1.2	**Action:** Refinement of Multi-Tiered System of Support **Need:** Unduplicated students demonstrate persistent academic achievement gaps and socio-emotional needs requiring intensified and differentiated support. **Scope:** LEA-wide	This action refines the LEA-wide MTSS to provide increased levels of targeted, small-group instruction and improved socio-emotional supports (Action 1.2), particularly for unduplicated students identified through data analysis. The LEA-wide scope ensures consistent access to these tiered interventions across all locations, but the design and resource allocation (including LREBG-funded staffing) are principally directed towards and intensified for unduplicated pupils to accelerate their academic growth and address well-being challenges more effectively than a universal support system.	Performance in iReady Assessments for ELA and Math, and CAASPP Achievement for English learners, foster youth, and low-income students.
2.1	**Action:** Enhancing Community Connection Opportunities **Need:** Foster youth, English learners, and low-income students often face barriers to full participation in school activities, which can affect their sense of belonging and engagement with the school community. **Scope:** LEA-wide	Increasing community connection opportunities addresses this need by creating inclusive, accessible engagement activities that encourage participation from all students and their families, regardless of background. This action aims to build a stronger, more cohesive school community where unduplicated students feel valued and supported.	Maintenance of Positive Community Engagement Perception, Maintenance of High Attendance Rate, Maintenance of Low Chronic Absenteeism.
2.2	**Action:** Development of Professional Growth Pathways	Providing professional growth pathways for all educators ensures a high-quality educational experience for every student, including unduplicated students. This school wide action	Increased Confidence and Integration of New Strategies by staff, and retention rates of

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
	Need: Educators require ongoing professional development to effectively meet the diverse needs of all students, fostering an engaging and supportive learning environment. **Scope:** LEA-wide	supports the continuous improvement of teaching strategies that directly benefit these groups by enhancing educators' skills and knowledge.	participating staff, which indirectly reflect the improved educational environment for unduplicated students.
2.3	**Action:** Enhancement of Professional Development for Live Instruction **Need:** Effective live instruction requires specific pedagogical skills, particularly to engage unduplicated students who may have varied learning needs and preferences. **Scope:** LEA-wide	Enhancing professional development for live instruction across the LEA ensures that all educators are equipped to deliver engaging, high-quality live instruction that caters to the diverse needs of all students, including unduplicated groups. This approach is crucial for maintaining student engagement and improving learning outcomes.	Expansion of Professional Development Opportunities focusing on live instruction, and improvement in staff confidence in job performance, particularly in engaging and instructing unduplicated students effectively.
2.4	**Action:** Development of Social and Emotional Support Systems **Need:** Unduplicated students, particularly foster youth, English learners, low-income, and homeless students, face significant socio-emotional barriers impacting their educational success. **Scope:**	This action develops an LEA-wide system to increase access to and improve the consistency and targeting of social and emotional resources and interventions (Action 2.4). While available to all, the system is designed with specific components, such as dedicated counselor support and tailored interventions (including LREBG-funded staffing), that are principally directed towards and intensified for unduplicated students to address their unique and heightened socio-emotional needs more effectively than a universal approach. The LEA-wide scope ensures equitable	Awareness of Socio-Emotional Resources, Expansion of Synchronous Support Opportunities

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
	LEA-wide	access to these intensified supports across all locations.	
3.2	**Action:** AI-Driven Personalized Learning Implementation **Need:** English learners and low-income students, in particular, benefit from personalized learning strategies that tailor instruction to their unique needs and learning styles, addressing gaps in knowledge and accelerating progress. **Scope:** LEA-wide	Implementing AI-driven personalized learning strategies on a schoolwide basis ensures that all students, especially unduplicated students, receive customized educational experiences designed to maximize their learning potential. This approach is critical for closing achievement gaps and supporting the academic growth of each student.	Increased Staff Confidence in Using AI Tools, Staff to Student Ratio Improvement, Improved Work Efficiency and Satisfaction.

Limited Actions

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

Goal and Action #	Identified Need(s)	How the Action(s) are Designed to Address Need(s)	Metric(s) to Monitor Effectiveness

For any limited action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage, as applicable.

Additional Concentration Grant Funding

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

n/a

Staff-to-student ratios by type of school and concentration of unduplicated students	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students	n/a	n/a
Staff-to-student ratio of certificated staff providing direct services to students	n/a	n/a

2026-27 Total Planned Expenditures Table

LCAP Year	1. Projected LCFF Base Grant (Input Dollar Amount)	2. Projected LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Input Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)
Totals	$ 9,052,297	$845,122	9.336%	0.000%	9.336%

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	$9,654,423.00	$1,953,098.00	$0.00	$111,483.00	$11,719,004.00	$8,542,273.00	$3,176,731.00

Goal #	Action #	Action Title	Student Group(s)	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Planned Percentage of Improved Services
1	1.1	Integration of Career, Community, and Life Skills	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2026-27	$6,872,048.00	$2,068,863.00	$7,494,454.00	$1,425,731.00	$0.00	$20,726.00	$8,940,911.00	
1	1.2	Refinement of Multi-Tiered System of Support	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2026-27	$677,942.00	$120,916.00	$373,758.00	$334,343.00	$0.00	$90,757.00	$798,858.00	
1	1.3	Enhancement of Math Proficiency for Students with Disabilities	Students with Disabilities	No			All Schools	Fiscal 2026-27	$0.00	$109,296.00	$4,309.00	$104,987.00	$0.00	$0.00	$109,296.00	
1	1.4	Unified Articulation Process Development	All	No			All Schools	Fiscal 2026-27	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	
2	2.1	Enhancing Community Connection Opportunities	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2026-27	$701,697.00	$54,030.00	$669,942.00	$85,785.00	$0.00	$0.00	$755,727.00	
2	2.2	Development of Professional Growth Pathways	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2026-27	$0.00	$307,360.00	$305,108.00	$2,252.00	$0.00	$0.00	$307,360.00	
2	2.3	Enhancement of Professional Development for Live Instruction	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2026-27	$0.00	$57,310.00	$57,310.00	$0.00	$0.00	$0.00	$57,310.00	
2	2.4	Development of Social and Emotional Support Systems	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2026-27	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	
3	3.1	Technology Optimization for Enhanced Operations	All	No			All Schools	Fiscal 2026-27	$290,586.00	$418,991.00	$709,577.00	$0.00	$0.00	$0.00	$709,577.00	
3	3.2	AI-Driven Personalized Learning Implementation	English Learners Foster Youth Low Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	Fiscal 2026-27	$0.00	$39,965.00	$39,965.00	$0.00	$0.00	$0.00	$39,965.00	

2026-27 Contributing Actions Table

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)	Totals by Type	Total LCFF Funds
$ 9,052,297	$845,122	9.336%	0.000%	9.336%	$8,940,537.00	0.000%	98.765 %	**Total:**	$8,940,537.00
								LEA-wide Total:	$8,940,537.00
								Limited Total:	$0.00
								Schoolwide Total:	$0.00

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
1	1.1	Integration of Career, Community, and Life Skills	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$7,494,454.00	
1	1.2	Refinement of Multi-Tiered System of Support	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$373,758.00	
2	2.1	Enhancing Community Connection Opportunities	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$669,942.00	
2	2.2	Development of Professional Growth Pathways	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$305,108.00	
2	2.3	Enhancement of Professional Development for Live Instruction	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$57,310.00	
2	2.4	Development of Social and Emotional Support Systems	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$0.00	
3	3.2	AI-Driven Personalized Learning Implementation	Yes	LEA-wide	English Learners Foster Youth	All Schools	$39,965.00	

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
					Low Income			

2025-26 Annual Update Table

Totals	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Expenditures (Total Funds)
Totals	$8,781,767.00	$10,179,300.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	**1.1**	Integration of Career, Community, and Life Skills	Yes	$6,719,006.00	$7,620,832
1	**1.2**	Refinement of Multi-Tiered System of Support	Yes	$621,888.00	$573,968
1	**1.3**	Enhancement of Math Proficiency for Students with Disabilities	No	$101,536.00	$169,087
1	**1.4**	Unified Articulation Process Development	No	$0.00	
2	**2.1**	Enhancing Community Connection Opportunities	Yes	$585,150.00	$601,907
2	**2.2**	Development of Professional Growth Pathways	Yes	$196,288.00	$195,058
2	**2.3**	Enhancement of Professional Development for Live Instruction	Yes	$34,753.00	$45,371
2	**2.4**	Development of Social and Emotional Support Systems	Yes	$54,759.00	$73,098
3	**3.1**	Technology Optimization for Enhanced Operations	No	$414,398.00	$843,451
3	**3.2**	AI-Driven Personalized Learning Implementation	Yes	$53,989.00	$56,528

2025-26 Contributing Actions Annual Update Table

6. Estimated LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Expenditures for Contributing Actions (Subtract 7 from 4)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Percentage of Improved Services (%)	Difference Between Planned and Estimated Percentage of Improved Services (Subtract 5 from 8)
$663,630	$6,365,943.00	$7,461,661.00	($1,095,718.00)	0.000%	0.000%	0.000%

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributing to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services (Input Percentage)
1	1.1	Integration of Career, Community, and Life Skills	Yes	$5,366,240.00	$6,407,008		
1	1.2	Refinement of Multi-Tiered System of Support	Yes	$251,642.00	$248,222		
2	2.1	Enhancing Community Connection Opportunities	Yes	$582,986.00	$596,683		
2	2.2	Development of Professional Growth Pathways	Yes	$92,996.00	$127,279		
2	2.3	Enhancement of Professional Development for Live Instruction	Yes	$34,753.00	$45,371		
2	2.4	Development of Social and Emotional Support Systems	Yes	$0.00			
3	3.2	AI-Driven Personalized Learning Implementation	Yes	$37,326.00	$37,098		

2025-26 LCFF Carryover Table

9. Estimated Actual LCFF Base Grant (Input Dollar Amount)	6. Estimated Actual LCFF Supplemental and/or Concentration Grants	LCFF Carryover — Percentage (Percentage from Prior Year)	10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	8. Total Estimated Actual Percentage of Improved Services (%)	11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9)	13. LCFF Carryover — Percentage (12 divided by 9)
$7,723,815	$663,630	0	8.592%	$7,461,661.00	0.000%	96.606%	$0.00	0.000%

Local Control and Accountability Plan Instructions

Plan Summary

Engaging Educational Partners

Goals and Actions

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at LCFF@cde.ca.gov.

Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (California Education Code [EC] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.

- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (EC Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.

- **Accountability and Compliance:** The LCAP serves an important accountability function because the nature of some LCAP template sections require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:

    - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, including long-term English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (EC Section 52064[b][4-6]).

    - Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (EC sections 52064[b][1] and [2]).

        - **NOTE:** As specified in EC Section 62064(b)(1), the LCAP must provide a description of the annual goals, for all pupils and each subgroup of pupils identified pursuant to EC Section 52052, to be achieved for each of the state priorities. Beginning in 2023–24, EC

Section 52052 identifies long-term English learners as a separate and distinct pupil subgroup with a numerical significance at 15 students.

- Annually reviewing and updating the LCAP to reflect progress toward the goals (EC Section 52064[b][7]).
- Ensuring that all increases attributable to supplemental and concentration grant calculations, including concentration grant add-on funding and/or LCFF carryover, are reflected in the LCAP (EC sections 52064[b][6], [8], and [11]).

The LCAP template, like each LEA's final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which must: (a) reflect comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (Dashboard), (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in EC sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity's budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2024–25, 2025–26, and 2026–27 school years reflects statutory changes made through Senate Bill 114 (Committee on Budget and Fiscal Review), Chapter 48, Statutes of 2023 and Senate Bill 153, Chapter 38, Statues of 2024.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA's diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

> Given present performance across the state priorities and on indicators in the Dashboard, how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions which, based on research, experience, and input gathered from educational partners, the LEA believes will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP but may include information about effective practices when developing the LCAP and completing the LCAP document. Additionally, the beginning of each template section includes information emphasizing the purpose that section serves.

Plan Summary

Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to present a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included throughout each subsequent section of the LCAP.

Requirements and Instructions

General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA. LEAs may also provide information about their strategic plan, vision, etc.

Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA.

- For example, information about an LEA in terms of geography, enrollment, employment, the number and size of specific schools, recent community challenges, and other such information the LEA may wish to include can enable a reader to more fully understand the LEA's LCAP.
- LEAs may also provide information about their strategic plan, vision, etc.
- As part of this response, identify all schools within the LEA receiving Equity Multiplier funding.

Reflections: Annual Performance

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

Reflect on the LEA's annual performance on the Dashboard and local data. This may include both successes and challenges identified by the LEA during the development process.

LEAs are encouraged to highlight how they are addressing the identified needs of student groups, and/or schools within the LCAP as part of this response.

As part of this response, the LEA must identify the following, which will remain unchanged during the three-year LCAP cycle:

- Any school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard;
- Any student group within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard; and/or
- Any student group within a school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard.

EC Section 52064.4 requires that an LEA that has unexpended Learning Recovery Emergency Block Grant (LREBG) funds must include one or more actions funded with LREBG funds within the 2026-27, 2026-27 and 2027-28 LCAPs, as applicable to the LEA. To implement the requirements of *EC* Section 52064.4, all LEAs must do the following:

- For the 2025–26, 2026–27, and 2027–28 LCAP years, identify whether or not the LEA has unexpended LREBG funds for the applicable LCAP year.
    - If the LEA has unexpended LREBG funds the LEA must provide the following:
        - The goal and action number for each action that will be funded, either in whole or in part, with LREBG funds; and
        - An explanation of the rationale for selecting each action funded with LREBG funds. This explanation must include:
            - An explanation of how the action is aligned with the allowable uses of funds identified in *EC* Section 32526(c)(2); and
            - An explanation of how the action is expected to address the area(s) of need of students and schools identified in the needs assessment required by *EC* Section 32526(d).
                - For information related to the allowable uses of funds and the required needs assessment, please see the Program Information tab on the LREBG Program Information web page.
            - Actions may be grouped together for purposes of these explanations.
            - The LEA may provide these explanations as part of the action description rather than as part of the Reflections: Annual Performance.
    - If the LEA does not have unexpended LREBG funds, the LEA is not required to conduct the needs assessment required by *EC* Section 32627(d), to provide the information identified above or to include actions funded with LREBG funds within the 2026-27, 2026-27 and 2027-28 LCAPs.

Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

Annually identify the reason(s) the LEA is eligible for or has requested technical assistance consistent with EC sections 47607.3, 52071, 52071.5, 52072, or 52072.5, and provide a summary of the work underway as part of receiving technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance, however this also includes LEAs that have requested technical assistance from their COE.

- If the LEA is not eligible for or receiving technical assistance, the LEA may respond to this prompt as “Not Applicable.”

Comprehensive Support and Improvement

An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

- Identify the schools within the LEA that have been identified for CSI.

Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

- Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.

Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

- Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

Engaging Educational Partners

Purpose

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard, accountability, and improvement across the state priorities and locally identified priorities (EC Section 52064[e][1]). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public to understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

Requirements

Requirements

School districts and COEs: *EC* Section 52060(g) and *EC* Section 52066(g) specify the educational partners that must be consulted when developing the LCAP:

- Teachers,

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- Principals,
- Administrators,
- Other school personnel,
- Local bargaining units of the LEA,
- Parents, and
- Students

A school district or COE receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Before adopting the LCAP, school districts and COEs must share it with the applicable committees, as identified below under Requirements and Instructions. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

Charter schools: *EC* Section 47606.5(d) requires that the following educational partners be consulted with when developing the LCAP:

- Teachers,
- Principals,
- Administrators,
- Other school personnel,
- Parents, and
- Students

A charter school receiving Equity Multiplier funds must also consult with educational partners at the school generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for the school.

The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals. Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the CDE's LCAP webpage.

Before the governing board/body of an LEA considers the adoption of the LCAP, the LEA must meet the following legal requirements:

- For school districts, see *Education Code* Section 52062;
    - **Note:** Charter schools using the LCAP as the School Plan for Student Achievement must meet the requirements of *EC* Section 52062(a).
- For COEs, see *Education Code* Section 52068; and
- For charter schools, see *Education Code* Section 47606.5.

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- **NOTE:** As a reminder, the superintendent of a school district or COE must respond, in writing, to comments received by the applicable committees identified in the *Education Code* sections listed above. This includes the parent advisory committee and may include the English learner parent advisory committee and, as of July 1, 2024, the student advisory committee, as applicable.

Instructions

Respond to the prompts as follows:

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Complete the table as follows:

Educational Partners

Identify the applicable educational partner(s) or group(s) that were engaged in the development of the LCAP.

Process for Engagement

Describe the engagement process used by the LEA to involve the identified educational partner(s) in the development of the LCAP. At a minimum, the LEA must describe how it met its obligation to consult with all statutorily required educational partners, as applicable to the type of LEA.

- A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA's philosophical approach to engaging its educational partners.

- An LEA receiving Equity Multiplier funds must also include a summary of how it consulted with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

Describe any goals, metrics, actions, or budgeted expenditures in the LCAP that were influenced by or developed in response to the educational partner feedback.

- A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP.

- An LEA receiving Equity Multiplier funds must include a description of how the consultation with educational partners at schools generating Equity Multiplier funds influenced the development of the adopted LCAP.

- For the purposes of this prompt, this may also include, but is not necessarily limited to:
  - Inclusion of a goal or decision to pursue a Focus Goal (as described below)
  - Inclusion of metrics other than the statutorily required metrics
  - Determination of the target outcome on one or more metrics
  - Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
  - Inclusion of action(s) or a group of actions
  - Elimination of action(s) or group of actions
  - Changes to the level of proposed expenditures for one or more actions
  - Inclusion of action(s) as contributing to increased or improved services for unduplicated students
  - Analysis of effectiveness of the specific actions to achieve the goal
  - Analysis of material differences in expenditures
  - Analysis of changes made to a goal for the ensuing LCAP year based on the annual update process
  - Analysis of challenges or successes in the implementation of actions

Goals and Actions

Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal must be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs must consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard, in determining whether and how to prioritize its goals within the LCAP. As previously stated, strategic planning that

is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students, and to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- Focus Goal: A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.
    - All Equity Multiplier goals must be developed as focus goals. For additional information, see Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding below.
- Broad Goal: A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.
- Maintenance of Progress Goal: A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

Requirement to Address the LCFF State Priorities

At a minimum, the LCAP must address all LCFF priorities and associated metrics articulated in *EC* sections 52060(d) and 52066(d), as applicable to the LEA. The *LCFF State Priorities Summary* provides a summary of *EC* sections 52060(d) and 52066(d) to aid in the development of the LCAP.

Respond to the following prompts, as applicable:

Focus Goal(s)

Description

The description provided for a Focus Goal must be specific, measurable, and time bound.

- An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach.
- The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

Type of Goal

Identify the type of goal being implemented as a Focus Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain why the LEA has chosen to prioritize this goal.

- An explanation must be based on Dashboard data or other locally collected data.
- LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners.
- LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding

Description

LEAs receiving Equity Multiplier funding must include one or more focus goals for each school generating Equity Multiplier funding. In addition to addressing the focus goal requirements described above, LEAs must adhere to the following requirements.

Focus goals for Equity Multiplier schoolsites must address the following:

(A) All student groups that have the lowest performance level on one or more state indicators on the Dashboard, and

(B) Any underlying issues in the credentialing, subject matter preparation, and retention of the school's educators, if applicable.

- Focus Goals for each and every Equity Multiplier schoolsite must identify specific metrics for each identified student group, as applicable.
- An LEA may create a single goal for multiple Equity Multiplier schoolsites if those schoolsites have the same student group(s) performing at the lowest performance level on one or more state indicators on the Dashboard or, experience similar issues in the credentialing, subject matter preparation, and retention of the school's educators.
    - When creating a single goal for multiple Equity Multiplier schoolsites, the goal must identify the student groups and the performance levels on the Dashboard that the Focus Goal is addressing; or,
    - The common issues the schoolsites are experiencing in credentialing, subject matter preparation, and retention of the school's educators, if applicable.

Type of Goal

Identify the type of goal being implemented as an Equity Multiplier Focus Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain why the LEA has chosen to prioritize this goal.

- An explanation must be based on Dashboard data or other locally collected data.
- LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners.
- LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.
- In addition to this information, the LEA must also identify:
    - The school or schools to which the goal applies

LEAs are encouraged to approach an Equity Multiplier goal from a wholistic standpoint, considering how the goal might maximize student outcomes through the use of LCFF and other funding in addition to Equity Multiplier funds.

- Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the Expanded Learning Opportunities Program (ELO-P), the Literacy Coaches and Reading Specialists (LCRS) Grant Program, and/or the California Community Schools Partnership Program (CCSPP).
- This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.

Note: *EC* Section 42238.024(b)(1) requires that Equity Multiplier funds be used for the provision of evidence-based services and supports for students. Evidence-based services and supports are based on objective evidence that has informed the design of the service or support and/or guides the modification of those services and supports. Evidence-based supports and strategies are most commonly based on educational research and/or metrics of LEA, school, and/or student performance.

Broad Goal

Description

Describe what the LEA plans to achieve through the actions included in the goal.

- The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal.

- The goal description organizes the actions and expected outcomes in a cohesive and consistent manner.
- A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

Type of Goal

Identify the type of goal being implemented as a Broad Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

Maintenance of Progress Goal

Description

Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP.

- Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP.
- The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

Type of Goal

Identify the type of goal being implemented as a Maintenance of Progress Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain how the actions will sustain the progress exemplified by the related metrics.

Measuring and Reporting Results:

For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes.

- LEAs must identify metrics for specific student groups, as appropriate, including expected outcomes that address and reduce disparities in outcomes between student groups.

- The metrics may be quantitative or qualitative; but at minimum, an LEA's LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year, as applicable to the type of LEA.

- To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant local indicator self-reflection tools within the Dashboard.

- **Required metrics for LEA-wide actions:** For each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.

    - These required metrics may be identified within the action description or the first prompt in the increased or improved services section, however the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.

- **Required metrics for Equity Multiplier goals**: For each Equity Multiplier goal, the LEA must identify:

    - The specific metrics for each identified student group at each specific schoolsite, as applicable, to measure the progress toward the goal, and/or

    - The specific metrics used to measure progress in meeting the goal related to credentialing, subject matter preparation, or educator retention at each specific schoolsite.

- **Required metrics for actions supported by LREBG funds**: To implement the requirements of *EC* Section 52064.4, LEAs with unexpended LREBG funds must include at least one metric to monitor the impact of each action funded with LREBG funds included in the goal.

    - The metrics being used to monitor the impact of each action funded with LREBG funds are not required to be new metrics; they may be metrics that are already being used to measure progress towards goals and actions included in the LCAP.

Complete the table as follows:

Metric #

- Enter the metric number.

Metric

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- Identify the standard of measure being used to determine progress towards the goal and/or to measure the effectiveness of one or more actions associated with the goal.

Baseline

- Enter the baseline when completing the LCAP for 2024–25.
    - Use the most recent data associated with the metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2023 Dashboard for the baseline of a metric only if that data represents the most recent available data (e.g., high school graduation rate).
    - Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS.
    - Indicate the school year to which the baseline data applies.
    - The baseline data must remain unchanged throughout the three-year LCAP.
        - This requirement is not intended to prevent LEAs from revising the baseline data if it is necessary to do so. For example, if an LEA identifies that its data collection practices for a particular metric are leading to inaccurate data and revises its practice to obtain accurate data, it would also be appropriate for the LEA to revise the baseline data to align with the more accurate data process and report its results using the accurate data.
        - If an LEA chooses to revise its baseline data, then, at a minimum, it must clearly identify the change as part of its response to the description of changes prompt in the Goal Analysis for the goal. LEAs are also strongly encouraged to involve their educational partners in the decision of whether or not to revise a baseline and to communicate the proposed change to their educational partners.
    - Note for Charter Schools: Charter schools developing a one- or two-year LCAP may identify a new baseline each year, as applicable.

Year 1 Outcome

- When completing the LCAP for 2025–26, enter the most recent data available. Indicate the school year to which the data applies.
    - Note for Charter Schools: Charter schools developing a one-year LCAP may provide the Year 1 Outcome when completing the LCAP for both 2025–26 and 2026–27 or may provide the Year 1 Outcome for 2025–26 and provide the Year 2 Outcome for 2026–27.

Year 2 Outcome

- When completing the LCAP for 2026–27, enter the most recent data available. Indicate the school year to which the data applies.

- Note for Charter Schools: Charter schools developing a one-year LCAP may identify the Year 2 Outcome as not applicable when completing the LCAP for 2026–27 or may provide the Year 2 Outcome for 2026–27.

Target for Year 3 Outcome

- When completing the first year of the LCAP, enter the target outcome for the relevant metric the LEA expects to achieve by the end of the three-year LCAP cycle.
    - Note for Charter Schools: Charter schools developing a one- or two-year LCAP may identify a Target for Year 1 or Target for Year 2, as applicable.

Current Difference from Baseline

- When completing the LCAP for 2025–26 and 2026–27, enter the current difference between the baseline and the yearly outcome, as applicable.
    - Note for Charter Schools: Charter schools developing a one- or two-year LCAP will identify the current difference between the baseline and the yearly outcome for Year 1 and/or the current difference between the baseline and the yearly outcome for Year 2, as applicable.

Timeline for school districts and COEs for completing the "**Measuring and Reporting Results**" part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
Enter information in this box when completing the LCAP for **2024–25** or when adding a new metric.	Enter information in this box when completing the LCAP for **2024–25** or when adding a new metric.	Enter information in this box when completing the LCAP for **2025–26**. Leave blank until then.	Enter information in this box when completing the LCAP for **2026–27**. Leave blank until then.	Enter information in this box when completing the LCAP for **2024–25** or when adding a new metric.	Enter information in this box when completing the LCAP for **2025–26** and **2026–27**. Leave blank until then.

Goal Analysis:

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective towards achieving the goal. "Effective" means the degree to which the planned actions were successful in producing the target result. Respond to the prompts as instructed.

Note: When completing the 2024–25 LCAP, use the 2023–24 Local Control and Accountability Plan Annual Update template to complete the Goal Analysis and identify the Goal Analysis prompts in the 2024–25 LCAP as "Not Applicable."

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

- Describe the overall implementation of the actions to achieve the articulated goal, including relevant challenges and successes experienced with implementation.
    - Include a discussion of relevant challenges and successes experienced with the implementation process.
    - This discussion must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

- Describe the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal. “Effectiveness” means the degree to which the actions were successful in producing the target result and “ineffectiveness” means that the actions did not produce any significant or targeted result.
    - In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal.
    - When responding to this prompt, LEAs may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.
    - Beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.
    - As noted above, beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period. For actions that have been identified as ineffective, the LEA must identify the ineffective action and must include a description of the following:

- The reasons for the ineffectiveness, and
- How changes to the action will result in a new or strengthened approach.

Actions:

Complete the table as follows. Add additional rows as necessary.

Action #

- Enter the action number.

Title

- Provide a short title for the action. This title will also appear in the action tables.

Description

- Provide a brief description of the action.
    - For actions that contribute to meeting the increased or improved services requirement, the LEA may include an explanation of how each action is principally directed towards and effective in meeting the LEA's goals for unduplicated students, as described in the instructions for the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.
    - As previously noted, for each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.
    - These required metrics may be identified within the action description or the first prompt in the increased or improved services section; however, the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.

Total Funds

- Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the action tables.

Contributing

- Indicate whether the action contributes to meeting the increased or improved services requirement as described in the Increased or Improved Services section using a “Y” for Yes or an “N” for No.
    - **Note:** for each such contributing action, the LEA will need to provide additional information in the Increased or Improved Services section to address the requirements in *California Code of Regulations*, Title 5 [5 *CCR*] Section 15496 in the Increased or Improved Services section of the LCAP.

Actions for Foster Youth: School districts, COEs, and charter schools that have a numerically significant foster youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to foster youth students.

Required Actions

For English Learners and Long-Term English Learners

- LEAs with 30 or more English learners and/or 15 or more long-term English learners must include specific actions in the LCAP related to, at a minimum:
    - Language acquisition programs, as defined in *EC* Section 306, provided to students, and
    - Professional development for teachers.
    - If an LEA has both 30 or more English learners and 15 or more long-term English learners, the LEA must include actions for both English learners and long-term English learners.

For Technical Assistance

- LEAs eligible for technical assistance pursuant to *EC* sections 47607.3, 52071, 52071.5, 52072, or 52072.5, must include specific actions within the LCAP related to its implementation of the work underway as part of technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance.

For Lowest Performing Dashboard Indicators

- LEAs that have Red Dashboard indicators for (1) a school within the LEA, (2) a student group within the LEA, and/or (3) a student group within any school within the LEA must include one or more specific actions within the LCAP:
    - The specific action(s) must be directed towards the identified student group(s) and/or school(s) and must address the identified state indicator(s) for which the student group or school received the lowest performance level on the 2023 Dashboard. Each student group and/or school that receives the lowest performance level on the 2023 Dashboard must be addressed by one or more actions.
    - These required actions will be effective for the three-year LCAP cycle.

For LEAs With Unexpended LREBG Funds

- To implement the requirements of *EC* Section 52064.4, LEAs with unexpended LREBG funds must include one or more actions supported with LREBG funds within the 2025–26, 2026–27, and 2027–28 LCAPs, as applicable to the LEA. Actions funded with LREBG funds must remain in the LCAP until the LEA has expended the remainder of its LREBG funds, after which time the actions may be removed from the LCAP.
    - Prior to identifying the actions included in the LCAP the LEA is required to conduct a needs assessment pursuant to *EC* Section 32526(d). For information related to the required needs assessment please see the Program Information tab on the LREBG

Program Information web page. Additional information about the needs assessment and evidence-based resources for the LREBG may be found on the California Statewide System of Support LREBG Resources web page. The required LREBG needs assessment may be part of the LEAs regular needs assessment for the LCAP if it meets the requirements of *EC* Section 32627(d).

- School districts receiving technical assistance and COEs providing technical assistance are encouraged to use the technical assistance process to support the school district in conducting the required needs assessment, the selection of actions funded by the LREBG and/or the evaluation of implementation of the actions required as part of the LCAP annual update process.
- As a reminder, LREBG funds must be used to implement one or more of the purposes articulated in *EC* Section 32526(c)(2).
- LEAs with unexpended LREBG funds must include one or more actions supported by LREBG funds within the LCAP. For each action supported by LREBG funding the action description must:
  - Identify the action as an LREBG action;
  - Include an explanation of how research supports the selected action;
  - Identify the metric(s) being used to monitor the impact of the action; and
  - Identify the amount of LREBG funds being used to support the action.

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students as defined in *EC* Section 42238.02 in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA's description in this section must align with the actions included in the Goals and Actions section as contributing.

Please Note: For the purpose of meeting the Increased or Improved Services requirement and consistent with *EC* Section 42238.02, long-term English learners are included in the English learner student group.

Statutory Requirements

An LEA is required to demonstrate in its LCAP how it is increasing or improving services for its students who are foster youth, English learners, and/or low-income, collectively referred to as unduplicated students, as compared to the services provided to all students in proportion to the increase in funding it receives based on the number and concentration of unduplicated students in the LEA (*EC* Section 42238.07[a][1], *EC*

Section 52064[b][8][B]; 5 *CCR* Section 15496[a]). This proportionality percentage is also known as the "minimum proportionality percentage" or "MPP." The manner in which an LEA demonstrates it is meeting its MPP is two-fold: (1) through the expenditure of LCFF funds or through the identification of a Planned Percentage of Improved Services as documented in the Contributing Actions Table, and (2) through the explanations provided in the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.

To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are identified in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided across the entire LEA (LEA-wide action), provided to an entire school (Schoolwide action), or solely provided to one or more unduplicated student group(s) (Limited action).

Therefore, for *any* action contributing to meet the increased or improved services requirement, the LEA must include an explanation of:

- How the action is increasing or improving services for the unduplicated student group(s) (Identified Needs and Action Design), and
- How the action meets the LEA's goals for its unduplicated pupils in the state and any local priority areas (Measurement of Effectiveness).

LEA-wide and Schoolwide Actions

In addition to the above required explanations, LEAs must provide a justification for why an LEA-wide or Schoolwide action is being provided to all students and how the action is intended to improve outcomes for unduplicated student group(s) as compared to all students.

- Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient.

- Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increased or improved services standard because enrolling students is not the same as serving students.

For School Districts Only

Actions provided on an **LEA-wide** basis at **school districts with an unduplicated pupil percentage of less than 55 percent** must also include a description of how the actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Actions provided on a **Schoolwide** basis for **schools with less than 40 percent enrollment of unduplicated pupils** must also include a description of how these actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Requirements and Instructions

Complete the tables as follows:

Total Projected LCFF Supplemental and/or Concentration Grants

- Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of foster youth, English learner, and low-income students. This amount includes the Additional 15 percent LCFF Concentration Grant.

Projected Additional 15 percent LCFF Concentration Grant

- Specify the amount of additional LCFF concentration grant add-on funding, as described in *EC* Section 42238.02, that the LEA estimates it will receive in the coming year.

Projected Percentage to Increase or Improve Services for the Coming School Year

- Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 *CCR* Section 15496(a)(7).

LCFF Carryover — Percentage

- Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

LCFF Carryover — Dollar

- Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero ($0).

Total Percentage to Increase or Improve Services for the Coming School Year

- Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEA's percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 *CCR* Section 15496(a)(7).

Required Descriptions:

LEA-wide and Schoolwide Actions

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

If the LEA has provided this required description in the Action Descriptions, state as such within the table.

Complete the table as follows:

Identified Need(s)

Provide an explanation of the unique identified need(s) of the LEA's unduplicated student group(s) for whom the action is principally directed.

An LEA demonstrates how an action is principally directed towards an unduplicated student group(s) when the LEA explains the need(s), condition(s), or circumstance(s) of the unduplicated student group(s) identified through a needs assessment and how the action addresses them. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

How the Action(s) are Designed to Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis

Provide an explanation of how the action as designed will address the unique identified need(s) of the LEA's unduplicated student group(s) for whom the action is principally directed and the rationale for why the action is being provided on an LEA-wide or schoolwide basis.

- As stated above, conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient.
- Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increased or improved services standard because enrolling students is not the same as serving students.

Metric(s) to Monitor Effectiveness

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

Note for COEs and Charter Schools: In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

Limited Actions

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

If the LEA has provided the required descriptions in the Action Descriptions, state as such.

Complete the table as follows:

Identified Need(s)

Provide an explanation of the unique need(s) of the unduplicated student group(s) being served identified through the LEA's needs assessment. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

How the Action(s) are Designed to Address Need(s)

Provide an explanation of how the action is designed to address the unique identified need(s) of the unduplicated student group(s) being served.

Metric(s) to Monitor Effectiveness

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

For any limited action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage, as applicable.

- For each action with an identified Planned Percentage of Improved Services, identify the goal and action number and describe the methodology that was used.

- When identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

- For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which, based on the LEA's current pay scale, the LEA estimates would cost $165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of $165,000 by the amount of LCFF Funding identified in the Total Planned Expenditures Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

Additional Concentration Grant Funding

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

An LEA that receives the additional concentration grant add-on described in *EC* Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

- An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.

- Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.

- An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as a single-school LEA or an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.

- In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA.

    - The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA.

    - The staff-to-student ratio must be based on the number of full-time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.

- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA.

    - The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA.

    - The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

Action Tables

Complete the Total Planned Expenditures Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Total Planned Expenditures Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. The word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)
- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2024–25 LCAP, 2024–25 will be the coming LCAP Year and 2023–24 will be the current LCAP Year.

Total Planned Expenditures Table

In the Total Planned Expenditures Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year**: Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant**: Provide the total amount estimated LCFF entitlement for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program, the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 *CCR* Section 15496(a)(8). Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs.

  See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.
- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 *CCR* Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.
- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover —

Percentage. ***This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.***

- **Goal #**: Enter the LCAP Goal number for the action.
- **Action #**: Enter the action's number as indicated in the LCAP Goal.
- **Action Title**: Provide a title of the action.
- **Student Group(s)**: Indicate the student group or groups who will be the primary beneficiary of the action by entering "All," or by entering a specific student group or groups.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services requirement; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services requirement.
- If "Yes" is entered into the Contributing column, then complete the following columns:
    - **Scope**: The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.
    - **Unduplicated Student Group(s)**: Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
    - **Location**: Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate "All Schools." If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter "Specific Schools" or "Specific Grade Spans." Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.
- **Time Span**: Enter "ongoing" if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter "1 Year," or "2 Years," or "6 Months."
- **Total Personnel**: Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel**: This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.

- **LCFF Funds**: Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA's total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
    - **Note:** For an action to contribute towards meeting the increased or improved services requirement, it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds**: Enter the total amount of Other State Funds utilized to implement this action, if any.
    - **Note:** Equity Multiplier funds must be included in the "Other State Funds" category, not in the "LCFF Funds" category. As a reminder, Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the ELO-P, the LCRS, and/or the CCSPP. This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LEA's LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.
- **Local Funds**: Enter the total amount of Local Funds utilized to implement this action, if any.
- **Federal Funds**: Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds**: This amount is automatically calculated based on amounts entered in the previous four columns.
- **Planned Percentage of Improved Services**: For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.
    - As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

      For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which, based on the LEA's current pay scale, the LEA estimates would cost $165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of $165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the 'Contributing to Increased or Improved Services?' column will need to be checked to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses.

Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures**: Enter the total estimated actual expenditures to implement this action, if any.

Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the 'Contributing to Increased or Improved Services?' column to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated based on the number and concentration of unduplicated students in the current school year.
- **Estimated Actual Expenditures for Contributing Actions**: Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.
- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).
    - Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been $169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of $169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant**: Provide the total amount of estimated LCFF Target Entitlement for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program,

the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 *CCR* Section 15496(a)(8). Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs. See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.

- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 *CCR* Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

Contributing Actions Table

- **4. Total Planned Contributing Expenditures (LCFF Funds)**
    - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column.
- **5. Total Planned Percentage of Improved Services**
    - This percentage is the total of the Planned Percentage of Improved Services column.
- **Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)**
    - This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

Contributing Actions Annual Update Table

Pursuant to *EC* Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- **6. Estimated Actual LCFF Supplemental and Concentration Grants**

- This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on the number and concentration of unduplicated students in the current school year.

- **4. Total Planned Contributing Expenditures (LCFF Funds)**
  - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds).
- **7. Total Estimated Actual Expenditures for Contributing Actions**
  - This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds).
- **Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)**
  - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4).
- **5. Total Planned Percentage of Improved Services (%)**
  - This amount is the total of the Planned Percentage of Improved Services column.
- **8. Total Estimated Actual Percentage of Improved Services (%)**
  - This amount is the total of the Estimated Actual Percentage of Improved Services column.
- **Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)**
  - This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8).

LCFF Carryover Table

- **10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 plus Carryover %)**
  - This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.
- **11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)**
  - This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).
- **12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)**

- If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

  The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.

- **13. LCFF Carryover — Percentage (12 divided by 9)**

  - This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education
November 2024

Local Control and Accountability Plan (LCAP)
Every Student Succeeds Act (ESSA)
Federal Addendum Template

School Year
2026-2027

Date of Board Approval
6/18/2026

LEA Name
Sage Oak Charter School- South

CDS Code:
37-75416-0139378

Link to the LCAP:
(optional)

For which ESSA programs apply to your LEA?

Choose From:

TITLE I, PART A
Improving Basic Programs Operated by State and Local Educational Agencies

TITLE II, PART A
Supporting Effective Instruction

TITLE IV, PART A
Student Support and Academic Enrichment Grants

*(**note:** This list only includes ESSA programs with LEA plan requirements; not all ESSA programs.)*

In the following pages, ONLY complete the sections for the corresponding programs.

Instructions

The LCAP Federal Addendum is meant to supplement the LCAP to ensure that eligible LEAs have the opportunity to meet the Local Educational Agency (LEA) Plan provisions of the ESSA.

The LCAP Federal Addendum Template must be completed and submitted to the California Department of Education (CDE) to apply for ESSA funding**.** LEAs are encouraged to review the LCAP Federal Addendum annually with their LCAP, as ESSA funding should be considered in yearly strategic planning.

The LEA must address the Strategy and Alignment prompts provided on the following page.

Each provision for each program must be addressed unless the provision is not applicable to the LEA.

In addressing these provisions, LEAs must provide a narrative that addresses the provision **within the LCAP Federal Addendum Template.**

Under State Priority Alignment, state priority numbers are provided to demonstrate where an ESSA provision aligns with state priorities. This is meant to assist LEAs in determining where ESSA provisions may already be addressed in the LEA's LCAP, as it demonstrates the LEA's efforts to support the state priorities.

The CDE emphasizes that **the LCAP Federal Addendum should not drive LCAP development.** ESSA funds are supplemental to state funds, just as the LCAP Federal Addendum supplements your LCAP. **LEAs are encouraged to integrate their ESSA funds into their LCAP development as much as possible to promote strategic planning of all resources**; however, this is not a requirement. In reviewing the LCAP Federal Addendum, staff will evaluate the LEA's responses to the ESSA plan provisions. There is no standard length for the responses. LEAs will be asked to clarify insufficient responses during the review process.

This template is designed to be used by LEAs who already have completed their LCAP Federal Addendum and received approval from CDE. This template will support LEAs with the review of their LCAP Federal Addendum and revision.

The review and revision of the LCAP Federal Addendum do not need to be submitted to CDE for approval. However, an LEA should have their local Board approve any revisions.

Even if the LEA plans to transfer all of its title funds, it must still address all of the provisions of the title from which it is transferring its funds. The LEA must first meet the application requirements of those funds before it can elect to transfer those funds to another title.

California's ESSA State Plan significantly shifts the state's approach to the utilization of federal resources in support of underserved student groups. This LCAP Federal Addendum provides LEAs with the opportunity to document their approach to maximizing the impact of federal investments in support of underserved students.

The implementation of ESSA in California presents an opportunity for LEAs to innovate with their federally-funded programs and align them with the priority goals they are realizing under the state's Local Control Funding Formula (LCFF).

LCFF provides LEAs flexibility to design programs and provide services that meet the needs of students in order to achieve readiness for college, career, and lifelong learning. The LCAP planning process supports continuous cycles of action, reflection, and improvement.

Please respond to the prompts below, and in the pages that follow, to describe the LEA's plan for making the best use of federal ESEA resources in alignment with other federal, state, and local programs as described in the LEA's LCAP.

Strategy

Explain the LEA's strategy for using federal funds to supplement and enhance local priorities or initiatives funded with state funds, as reflected in the LEA's LCAP. This shall include describing the rationale/evidence for the selected use(s) of federal funds within the context of the LEA's broader strategy reflected in the LCAP.

Sage Oak Charter School strategically utilizes federal funds to supplement and enhance local priorities and initiatives funded with state funds, as detailed in our Local Control and Accountability Plan (LCAP). This strategic allocation ensures that federal resources are effectively supporting specific goals within our school community, aligning closely with our broader educational objectives.

Federal funds under Title I, Part A are targeted toward Goal 1 actions aimed at enhancing College and Career Readiness programs. These funds specifically support socioeconomically disadvantaged students by enhancing academic interventions and providing resources that facilitate both college and career readiness. For Goal 2, Title II, Part A funds are allocated to augment professional development programs, including extensive training for educators on differentiated instruction and effective strategies to engage students with diverse learning needs. This ensures that our teaching staff can implement the educational strategies identified in the LCAP effectively. Additionally, under Goal 3, Title IV, Part A funds align with the focus on leveraging technologies to enhance personalized learning pathways. These funds support the integration of advanced technological tools and programs that support a well-rounded education, including enhancing STEM education, supporting arts programs, and providing comprehensive mental health services.

The rationale behind these specific allocations of federal funds is supported by research that shows targeted interventions in areas such as reading and math can close achievement gaps, particularly for low-income students. Studies consistently indicate a strong correlation between teacher qualifications, their ongoing professional development, and student success. This underscores the necessity of equipping teachers with advanced skills and knowledge. Furthermore, engagement in arts and STEM has been linked to higher academic performance and motivation, while robust mental health support is essential for overall student success and well-being.

By ensuring that federal funds are aligned with the specific goals and actions outlined in our LCAP, Sage Oak Charter School maximizes the impact of these resources. This approach not only meets federal and state compliance requirements but also significantly advances our mission to provide a high-quality, equitable, and comprehensive education to all students, fostering both academic excellence and personal growth.

Alignment

Describe the efforts that the LEA will take to align use of federal funds with activities funded by state and local funds and, as applicable, across different federal grant programs.

Sage Oak Charter School ensures the effective alignment of federal funds with activities funded by state and local funds, and where applicable, across different federal grant programs, through a series of strategic efforts:

We engage in an integrated planning and budgeting process that includes stakeholders from all levels of the organization. This collaborative approach ensures that all sources of funding—federal, state, and local—are considered collectively to create a unified resource allocation strategy. This integrated planning is crucial for aligning the objectives across different funding streams and maximizing the impact of each dollar spent.

In addition, we coordinate activities across different federal grant programs, such as Title I, Title II, and Title IV, to leverage synergies and amplify the effects of these funds. By identifying overlapping goals and complementary activities, resources from these programs can be pooled to support broader educational initiatives, enhancing the cohesion and effectiveness of our efforts.

Our decision-making process is strongly data-driven, relying on regular data collection and analysis to assess the effectiveness of funded programs and to adjust strategies as necessary. This allows us to align federal funds closely with

the specific needs identified through state and local assessments, ensuring resources are targeted to areas of greatest need.

Stakeholder engagement is also a cornerstone of our approach. By involving a wide range of stakeholders, including parents, teachers, and community members, in the funding decision-making process, we ensure that the allocation of resources reflects the priorities and needs of our school community, thereby increasing the relevance and impact of the funded programs.

Lastly, continuous monitoring and regular reporting on the use and impact of funds ensure transparency and accountability. This not only helps in making necessary adjustments to align the use of federal, state, and local funds effectively but also ensures that activities across different federal grant programs are well-coordinated and directed toward our common educational goals.

Through these efforts, Sage Oak Charter School fosters a strategic and effective use of all funding sources, ensuring that federal funds not only meet regulatory requirements but also significantly enhance our educational initiatives funded by state and local revenues. This strategic alignment supports our overarching goal of providing high-quality, equitable, and comprehensive education to all students

ESSA Provisions Addressed Within the LCAP

Within the LCAP an LEA is required to describe its goals and the specific actions to achieve those goals, for each of the LCFF state priorities. In an approvable LCAP, it will be apparent from the descriptions of the goals, actions, and services how an LEA is acting to address the following ESSA provisions through the aligned LCFF state priorities and/or the state accountability system.

TITLE I, PART A

Monitoring Student Progress Towards Meeting Challenging State Academic Standards

ESSA SECTION	STATE PRIORITY ALIGNMENT
1112(b)(1) (A–D)	1, 2, 4, 7, 8 *(as applicable)*

Describe how the LEA will monitor students' progress in meeting the challenging state academic standards by:

(A) developing and implementing a well-rounded program of instruction to meet the academic needs of all students;
(B) identifying students who may be at risk for academic failure;
(C) providing additional educational assistance to individual students the LEA or school determines need help in meeting the challenging State academic standards; and
(D) identifying and implementing instructional and other strategies intended to strengthen academic programs and improve school conditions for student learning.

Overuse in Discipline Practices that Remove Students from the Classroom

ESSA SECTION	STATE PRIORITY ALIGNMENT
1112(b)(11)	6 *(as applicable)*

Describe how the LEA will support efforts to reduce the overuse of discipline practices that remove students from the classroom, which may include identifying and supporting schools with high rates of discipline, disaggregated by each of the student groups, as defined in Section 1111(c)(2).

Career Technical and Work-based Opportunities

ESSA SECTION	STATE PRIORITY ALIGNMENT
1112(b)(12)(A–B)	2, 4, 7 *(as applicable)*

If determined appropriate by the LEA, describe how such agency will support programs that coordinate and integrate:

(A) academic and career and technical education content through coordinated instructional strategies, that may incorporate experiential learning opportunities and promote skills attainment important to in-demand occupations or industries in the State; and
(B) work-based learning opportunities that provide students in-depth interaction with industry professionals and, if appropriate, academic credit.

TITLE II, PART A

Title II, Part A Activities

ESSA SECTION	STATE PRIORITY ALIGNMENT
2102(b)(2)(A)	1, 2, 4 *(as applicable)*

Provide a description of the activities to be carried out by the LEA under this Section and how these activities will be aligned with challenging State academic standards.

TITLE III, PART A

Parent, Family, and Community Engagement

ESSA SECTION	STATE PRIORITY ALIGNMENT
3116(b)(3)	3, 6 *(as applicable)*

Describe how the eligible entity will promote parent, family, and community engagement in the education of English learners.

ESSA Provisions Addressed in the Consolidated Application and Reporting System

An LEA addresses the following ESSA provision as part of completing annual reporting through the Consolidated Application and Reporting System (CARS).

TITLE I, PART A

Poverty Criteria

ESSA SECTION(S)	STATE PRIORITY ALIGNMENT
1112(b)(4)	N/A

Describe the poverty criteria that will be used to select school attendance areas under Section 1113.

Sage Oak utilizes specific poverty criteria under Section 1113, in compliance with the Every Student Succeeds Act (ESSA) provisions detailed in Title I, Part A. This process is part of our annual reporting through the Consolidated Application and Reporting System (CARS), ensuring transparency and adherence to federal guidelines.

As a nonclasroom-based charter school, we operate as a single LEA. We use the percentage of students eligible for the Household Data Collection (HDC) as our primary poverty criterion. Additionally, we consider other socio-economic indicators such as parental income levels. By combining these data points, Sage Oak can more accurately identify student groups that require additional support, allowing for more targeted resource allocation. This method provides a comprehensive measure of socio-economic disadvantage within our community.

This approach not only helps in directing resources to improve educational equity but also aligns with our broader commitment to providing supportive educational environments for all students, particularly those facing economic challenges. Through careful and systematic analysis of poverty indicators, Sage Oak ensures that federal funding is utilized effectively to enhance educational opportunities and outcomes for our most disadvantaged populations.

ESSA Provisions Not Addressed in the LCAP

For the majority of LEAs, the ESSA provisions on the following pages do not align with state priorities. **Each provision for each program provided on the following pages must be addressed** unless the provision is not applicable to the LEA. In addressing these provisions, LEAs must provide a narrative that addresses the provision **within this addendum**.

As previously stated, the CDE emphasizes that the LCAP Federal Addendum should not drive LCAP development. ESSA funds are supplemental to state funds, just as the LCAP Federal Addendum supplements your LCAP. **LEAs are encouraged to integrate their ESSA funds into their LCAP** development as much as possible to promote strategic planning of all resources; however, this is not a requirement. In reviewing the LCAP Federal Addendum, staff will evaluate the LEA's responses to the ESSA plan provisions. There is no standard length for the responses. LEAs will be asked to clarify insufficient responses during the review process.

TITLE I, PART A

Educator Equity

ESSA SECTION 1112(b)(2) – *Not Applicable to Charters and Single School Districts.*

Describe how the LEA will identify and address, as required under State plans as described in Section 1111(g)(1)(B), any disparities that result in low-income students and minority students being taught at higher rates than other students by ineffective, inexperienced, or out-of-field teachers.

NOTE: In this section, LEAs must identify and address disparities. Tools on the CDEs website (https://www.cde.ca.gov/pd/ee/peat.asp) can help with this process. LEAs are required to specifically address the following at comparable sites:

1. What # and % of teachers at sites are inexperienced, misassigned, or out-of-field in relation to:
    a. Number of low-income students
    b. Number of minority students
2. Does the LEA have an educator equity gap –
    a. If yes, must create a plan which must include root cause analysis of the disparity
    b. A plan must be created with meaningful educational partner engagement.

Educator Equity Data Tables available here:

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THIS ESSA PROVISION IS ADDRESSED BELOW:

N/A

On November 6, 2019, the SBE approved updated definitions for "ineffective" and "out-of-field" teachers to be included in the amended California ESSA Consolidated State Plan.

Term	Definition
Ineffective teacher	An ineffective teacher is any of the following: • An individual whose assignment is legally authorized by an emergency permit that does not require possession of a full teaching license; or • A teacher who holds a teaching credential but does not possess a permit or authorization that temporarily allows them to teach outside of their credentialed area (misassigned)

	• An individual who holds no credential, permit, or authorization to teach in California. Under this definition, teachers with the following limited emergency permits would be considered ineffective: • **Provisional Internship Permits,** • **Short-Term Staff Permits** • **Variable Term Waivers** **Substitute permits or Teaching Permits for Statutory Leave (TSPL) holders serving as the teacher of record**
Out-of-field teacher	A credentialed out-of-field teacher is: A credentialed teacher who has not yet demonstrated subject matter competence in the subject area(s) or for the student population to which he or she is assigned. Under this definition, the following limited permits will be considered out of the field: • General Education Limited Assignment Permit (GELAP) • Special Education Limited Assignment Permit (SELAP) • **Short-Term Waivers** • **Emergency English Learner or Bilingual Authorization Permits** **Local Assignment Options** (except for those made pursuant to the *California Code of Regulations*, Title 5, Section 80005[b])
Inexperienced Teacher	A teacher who has two or fewer years of teaching experience.
Minority Student	A student who is American Indian/Alaska Native, Asian, African American, Filipino, Native Hawaiian/Pacific Islander, Hispanic, or Two or More Races Not Hispanic.
Low-Income Student	A student who is eligible to receive Free or Reduced-Price Meals

Parent and Family Engagement

ESSA SECTIONS 1112(b)(3) and 1112(b)(7)

Describe the strategy the LEA will use to implement effective parent and family engagement under Section 1116.

Sage Oak implements effective parent and family engagement through strategic communication and collaborative initiatives under Section 1116. We have established a comprehensive engagement policy, developed with direct input from parents, ensuring that strategies are aligned with the needs and expectations of our school community. This policy guides our efforts to provide parents with clear, accessible information about academic standards, assessments, and student progress, empowering them to support their children's education effectively.

Our approach includes providing resources to help parents understand curriculum demands and enhance their ability to assist with learning activities. We also educate our staff on the importance of parental involvement, training them to engage with families as equal partners in education. Through regular updates and transparent communication, we keep parents informed and involved in school activities, decision-making processes, and the development of support plans for students.

Additionally, Sage Oak integrates parent and family engagement strategies with other federal, state, and local programs to enhance the educational support network available to our students.

To meet this requirement, LEAs must provide a description of the following:

ESSA Section 1112(b)(3): how the LEA will carry out its responsibilities under paragraphs (1) and (2) of Section 1111(d);

1. How the LEA will involve parents and family members at identified schools in jointly developing Comprehensive Support and Improvement plans
2. How the LEA will involve parents and family members in identified schools in jointly developing the Targeted Support and Improvement plans
3. In the absence of the identification of any schools for Comprehensive Support and Improvement (CSI) or any schools for Targeted Assistance and Intervention (TSI), the LEA may write N/A. This provision will not be reviewed.

ESSA Section 1112(b)(7): the strategy the LEA will use to implement effective parent and family engagement under Section 1116; shall include how the LEA and its schools will build capacity for parent and family engagement by:

1. Describe the LEA parent and family engagement policy, and how it was developed jointly with, agree on with, and distribute to, parents and family members of participating children a written parent and family engagement policy (ESSA Section 1116(a)).
2. Describe how the LEA will provide assistance to parents of children served by the school or local educational agency, as appropriate, in understanding such topics as the challenging State academic standards, State and local academic assessments, the requirements of this part, and how to monitor a child's progress and work with educators to improve the achievement of their children; (ESSA Section 1116(e)(1))
3. Describe how the LEA will provide materials and training to help parents to work with their children to improve their children's achievement, such as literacy training and using technology (including education about the harms of copyright piracy), as appropriate, to foster parental involvement; (ESSA Section 1116(e)(2))
4. Describe how the LEA will educate teachers, specialized instructional support personnel, principals, other school leaders, and other staff, with the assistance of parents, in the value and utility of contributions of parents, and in how to reach out to, communicate with, and work with parents as equal partners, implement and coordinate parent programs, and build ties between parents and the school; (ESSA Section 1116(e)(3))
5. Describe how the LEA will to the extent feasible and appropriate, coordinate and integrate parent involvement programs and activities with other Federal, State, and local programs, including public preschool programs, and conduct other activities, such as parent resource centers, that encourage and support parents in more fully participating in the education of their children; (ESSA Section 1116(e)(4))
6. Describe how the LEA will ensure that information related to school and parent programs, meetings, and other activities is sent to the parents of participating children in a format and, to the extent practicable, in a language the parents can understand (ESSA Section 1116(e)(5))
7. Describe how the LEA will provide such other reasonable support for parental involvement activities as parents may request (ESSA Section 1116(e)(14).
8. Describe how the LEA will provide opportunities for the informed participation of parents and family members (including parents and family members who have limited English proficiency, parents and family members with disabilities, and parents and family members of migratory children), including providing information and school reports in a format and, to the extent practicable, in a language, such parents understand (ESSA Section 1116(f)).

Also, include how the LEA will align parent involvement required in Section 1116 with the LCAP educational partner engagement process.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Sage Oak is dedicated to enhancing engagement through a comprehensive strategy that ensures the active participation of parents and families in their children's education. Our approach aligns with Section 1116 of ESSA, focusing on creating inclusive, supportive, and informative engagement practices that bridge communication gaps between the school and home environments. This alignment is seamlessly integrated with our LCAP educational partner engagement process, ensuring a unified approach to stakeholder involvement.

We have developed a robust parent and family engagement policy in close collaboration with families, ensuring it reflects their needs and perspectives. This policy is approved by the parent advisory committee and distributed annually emphasizing clarity and comprehensibility. To assist parents in understanding the challenging state academic standards, state and local academic assessments, and other educational requirements, we provide informational sessions that are crucial for empowering them to support their children's academic progress effectively.

At Sage Oak, we prioritize making education accessible and engaging. Our staff is trained to value and integrate parental contributions, working with parents as equal partners in the educational process. Our parent involvement programs are coordinated with other federal, state, and local services, enhancing the resources available to our families.

Through regular updates and proactive communication using various platforms—including emails, our website, and social media—we ensure that all families are well-informed and prepared to participate in school activities and decision-making processes. Our engagement strategies are aligned with our LCAP goals, ensuring that parental input is an integral part of our educational planning and evaluation processes.

In aligning these efforts with our LCAP educational partner engagement process, we ensure that parent and family engagement strategies are integral to our broader educational planning. This involves incorporating parent feedback into LCAP development and review, ensuring that our strategic planning reflects the community's voice and needs. By integrating the requirements of Section 1116 into our LCAP process, we enhance the educational experience for all students and foster a supportive community that is deeply involved in our educational mission. This approach is consistent with Sage Oak's educational model, which emphasizes personalized, flexible learning environments that engage and empower our students and their families.

Schoolwide Programs, Targeted Support Programs, and Programs for Neglected or Delinquent Children

ESSA SECTIONS 1112(b)(5) and 1112(b)(9)

Describe, in general, the nature of the programs to be conducted by the LEA’s schools under sections 1114 and 1115 and, where appropriate, educational services outside such schools for children living in local institutions for neglected or delinquent children, and for neglected and delinquent children in community day school programs.

At Sage Oak, we are committed to providing a wide array of programs under sections 1114 and 1115 of ESSA, designed to support and enhance the educational experiences of all students, including those who are neglected or delinquent. These programs are tailored to meet the diverse needs of our student population and are implemented with the goal of ensuring every student has access to high-quality education that prepares them for success in college, career, and life.

Our schoolwide programs focus on comprehensive strategies that improve the entire educational program, making them more responsive to the needs of our students, particularly those who are at risk of failing academic standards. These programs integrate various funding sources to support initiatives such as enhanced instructional methods, integrated technology, and expanded professional development for teachers. The overarching goal is to raise the academic achievement of all students by improving the entire school's instructional and operational effectiveness.

For students specifically identified as needing extra academic support, we have targeted assistance programs. These programs provide supplementary educational services to help raise the academic achievement of students at risk of failing. Services include personalized tutoring, intervention programs in reading and math, credit recovery courses, and additional support services tailored to the needs of individual students. These targeted efforts focus on students who are the furthest from meeting the standards the school sets for all children.

If applicable, for children living in local institutions for the neglected or delinquent, Sage Oak will offer educational services designed to address their unique educational and social-emotional needs. These services will include tailored curricula that focus on core academic subjects, life skills education, and social-emotional learning opportunities. We will collaborate with local agencies and institutions to ensure that these students receive a coordinated approach to support that includes academic tutoring, mentoring, and counseling services.

The implementation of these programs is closely monitored to assess their effectiveness in improving educational outcomes. Adjustments are made based on ongoing evaluations and feedback from students, parents, and educational staff. By aligning these initiatives with our LCAP goals, Sage Oak ensures that federal funds are used strategically to supplement and enhance our state-funded initiatives, thereby providing a cohesive and integrated educational experience for all students.

Describe how teachers and school leaders, in consultation with parents, administrators, paraprofessionals, and specialized instructional support personnel, in schools operating a targeted assistance school program under Section 1115, will identify the eligible children most in need of services under this part.

THIS ESSA PROVISION IS ADDRESSED BELOW:

At Sage Oak Charter School, identifying students most in need of services under the targeted assistance school program outlined in Section 1115 is a collaborative and data-driven process, tailored to our independent study model. This approach involves a broad spectrum of the school community to ensure that the support provided is comprehensively tailored to the individual needs of each student.

The identification process begins with an analysis of academic performance data, including standardized test results, progress in coursework, teacher evaluations, and other relevant assessments. We also consider factors such as engagement levels in learning activities, progress in personalized learning plans, and any social-emotional assessments to ensure a holistic view of each student's needs.

Teachers and school leaders work in consultation with parents, administrators, and specialized instructional support personnel to review and discuss the data collected. This collaborative dialogue is crucial as it helps integrate insights from various perspectives, particularly from parents who provide vital information about their child's learning environment and any external factors influencing their educational experience.

The team prioritizes students based on the urgency and severity of their needs. The criteria for this prioritization include the extent of academic challenges, the potential impact of additional support on the student’s educational outcomes, and the capacity of our resources to effectively address these needs.

This collaborative and data-informed approach ensures that the targeted assistance provided is directly responsive to the most pressing needs of our students. By maintaining regular communication and strategic meetings with all stakeholders involved, Sage Oak sustains a dynamic and adaptable support system that enhances educational outcomes and overall student well-being in a non-classroom based setting.

Homeless Children and Youth Services

ESSA SECTION 1112(b)(6)

Describe the services the LEA will provide homeless children and youths, including services provided with funds reserved under Section 1113(c)(3)(A), to support the enrollment, attendance, and success of homeless children and youths, in coordination with the services the LEA is providing under the McKinney-Vento Homeless Assistance Act (42 United States Code 11301 et seq.).

THIS ESSA PROVISION IS ADDRESSED BELOW:

At Sage Oak, we are committed to supporting the educational needs of homeless children and youth through a comprehensive approach that aligns with the McKinney-Vento Homeless Assistance Act. Our strategy ensures that these students have equal access to educational opportunities and are supported in their enrollment, attendance, and academic success.

To address the challenges faced by homeless students, Sage Oak provides specific services designed to remove barriers to their education. This includes ensuring immediate enrollment even when students do not have access to required documents typically necessary for school entry. We provide assistance with obtaining academic and medical records, and we offer school supplies and materials at no cost to the families. We also reserve a portion of our federal funds under Section 1113(c)(3)(A) to support additional services tailored to the needs of homeless students.

In collaboration with services provided under the McKinney-Vento Act, our school appoints a liaison for homeless students to help coordinate these efforts. This liaison works directly with students and families to identify their specific needs and connect them with available resources. They also work with school staff to raise awareness about the challenges faced by homeless students and to train staff on how to best support these students in an educational setting.

Through these coordinated efforts, Sage Oak Charter School strives to create a supportive environment that mitigates the impact of homelessness on students' education, ensuring that all students have the opportunity to succeed and thrive academically.

Student Transitions

ESSA SECTIONS 1112(b)(8), 1112(b)(10), and 1112(b)(10) (A–B)

Describe, if applicable, how the LEA will support, coordinate, and integrate services provided under this part with early childhood education programs at the LEA or individual school level, including plans for the transition of participants in such programs to local elementary school programs.

N/A

Describe, if applicable, how the LEA will implement strategies to facilitate effective transitions for students from middle grades to high school and from high school to postsecondary education including:

(A) through coordination with institutions of higher education, employers, and other local partners; and

(B) through increased student access to early college high school or dual or concurrent enrollment opportunities, or career counseling to identify student interests and skills.

THIS ESSA PROVISION IS ADDRESSED BELOW:

At Sage Oak, we recognize the importance of smooth transitions for students moving from middle grades to high school and from high school to postsecondary education. Our strategies are designed to support these critical transitions, ensuring that our students are well-prepared for each new phase of their educational journey.

Key to facilitating the transition from middle grades to high school, Sage Oak ensures our curriculum aligns with the latest academic standards and opportunities. Additionally, we engage with local employers and community partners to provide students with relevant insights into various career paths and the skills required in the workforce, enriching our curriculum with practical applications and real-world relevance.

For students transitioning from high school to postsecondary education or careers, Sage Oak offers robust programs designed to enhance college and career readiness. This includes increased access to early college high school programs, dual or concurrent enrollment opportunities, and comprehensive career counseling services. Our educational advisors play a crucial role in this process, working individually with students to create personalized learning plans that reflect their academic and career goals. These plans are instrumental in navigating course selections, extracurricular activities, and appropriate early college opportunities, tailored to each student's unique interests and skills. Additionally, we are actively increasing our Career and Technical Education (CTE) pathways to include new areas such as Child Development, Sports Medicine, and Arts, Media, and Entertainment (AME), offering students practical and varied career training options that align with their personal interests and market demands. We maintain up-to-date knowledge of University of California (UC) and California State University (CSU) requirements, as well as offerings at community colleges, to guide our students effectively through their educational pathways.

In addition to these transition strategies, our commitment under LCAP Action 1:4 involves developing unified articulation processes that seamlessly transition students through each grade band. This includes integrating critical feedback from graduates and their families to enhance the continuity and relevance of our curriculum, further ensuring our students are prepared for the expectations and challenges of their subsequent educational stages.

Sage Oak’s proactive approach ensures that our students are not only aware of their postsecondary options but are also equipped to make informed decisions about their futures. By staying abreast of the latest educational requirements and offerings and implementing these strategies in coordination with higher education institutions, employers, and local partners, we prepare our students to successfully navigate the transitions between educational stages, fully equipped with the knowledge, skills, and qualifications needed to thrive in their chosen paths.

Additional Information Regarding Use of Funds Under this Part

ESSA SECTION 1112(b)(13) (A–B)

Provide any other information on how the LEA proposes to use funds to meet the purposes of this part, and that the LEA determines appropriate to provide, which may include how the LEA will:

(A) assist schools in identifying and serving gifted and talented students; and
(B) assist schools in developing effective school library programs to provide students an opportunity to develop digital literacy skills and improve academic achievement.

THIS ESSA PROVISION IS ADDRESSED BELOW:

N/A

TITLE I, PART D

Description of Program
ESSA SECTION 1423(1)

Provide a description of the program to be assisted [by Title I, Part D].

THIS ESSA PROVISION IS ADDRESSED BELOW:

Formal Agreements
ESSA SECTION 1423(2)

Provide a description of formal agreements, regarding the program to be assisted, between the
(A) LEA; and
(B) correctional facilities and alternative school programs serving children and youth involved with the juvenile justice system, including such facilities operated by the Secretary of the Interior and Indian tribes.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Comparable Education Program
ESSA SECTION 1423(3)

As appropriate, provide a description of how participating schools will coordinate with facilities working with delinquent children and youth to ensure that such children and youth are participating in an education program comparable to one operating in the local school such youth would attend.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Successful Transitions
ESSA SECTION 1423(4)

Provide a description of the program operated by participating schools to facilitate the successful transition of children and youth returning from correctional facilities and, as appropriate, the types of services that such schools will provide such children and youth and other at-risk children and youth.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Educational Needs
ESSA SECTION 1423(5)

Provide a description of the characteristics (including learning difficulties, substance abuse problems, and other special needs) of the children and youth who will be returning from correctional facilities and, as appropriate, other at-risk children and youth expected to be served by the program, and a description of how the school will coordinate existing educational programs to meet the unique educational needs of such children and youth.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Social, Health, and Other Services
ESSA SECTION 1423(6)

As appropriate, provide a description of how schools will coordinate with existing social, health, and other services to meet the needs of students returning from correctional facilities, at-risk children or youth, and other participating children or youth, including prenatal health care and nutrition services related to the health of the parent and the child or youth, parenting and child development classes, child care, targeted reentry and outreach programs, referrals to community resources, and scheduling flexibility.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Postsecondary and Workforce Partnerships
ESSA SECTION 1423(7)

As appropriate, provide a description of any partnerships with institutions of higher education or local businesses to facilitate postsecondary and workforce success for children and youth returning from correctional facilities, such as through participation in credit-bearing coursework while in secondary school, enrollment in postsecondary education, participation in career and technical education programming, and mentoring services for participating students.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Parent and Family Involvement
ESSA SECTION 1423(8)

As appropriate, provide a description of how the program will involve parents and family members in efforts to improve the educational achievement of their children, assist in dropout prevention activities, and prevent the involvement of their children in delinquent activities.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Program Coordination
ESSA SECTION 1423(9–10)

Provide a description of how the program under this subpart will be coordinated with other Federal, State, and local programs, such as programs under title I of the Workforce Innovation and Opportunity Act and career and technical education programs serving at-risk children and youth.

Include how the program will be coordinated with programs operated under the Juvenile Justice and Delinquency Prevention Act of 1974 and other comparable programs, if applicable.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Probation Officer Coordination
ESSA SECTION 1423(11)

As appropriate, provide a description of how schools will work with probation officers to assist in meeting the needs of children and youth returning from correctional facilities.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Individualized Education Program Awareness
ESSA SECTION 1423(12)

Provide a description of the efforts participating schools will make to ensure correctional facilities working with children and youth are aware of a child's or youth's existing individualized education program.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Alternative Placements
ESSA SECTIONS 1423(13)

As appropriate, provide a description of the steps participating schools will take to find alternative placements for children and youth interested in continuing their education but unable to participate in a traditional public school program.

THIS ESSA PROVISION IS ADDRESSED BELOW:

TITLE II, PART A

Professional Growth and Improvement

ESSA SECTION 2102(b)(2)(B)

Provide a description of the LEA's systems of professional growth and improvement, such as induction for teachers, principals, or other school leaders and opportunities for building the capacity of teachers and opportunities to develop meaningful teacher leadership.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Address these questions:

1. Please provide a description of the LEA's systems of professional growth and improvement for teachers, principals, and other school leaders.
2. Please address principals, teachers, and other school leaders separately.
3. Please explain how the systems promote professional growth and ensure improvement, including how the LEA measures growth and improvement
4. Please describe how the systems support principals, teachers, and other school leaders from the beginning of their careers, throughout their careers, and through advancement opportunities
5. Please describe how the LEA evaluates its systems of professional growth and improvement and makes adjustments to ensure continuous improvement within these systems.

At Sage Oak, our professional development strategy is crafted to support educators at every stage of their careers, ensuring they are well-prepared to meet the diverse needs of our student body. This strategy begins with induction for new teachers and extends through ongoing development opportunities, including participation in professional development conferences such as those provided by the California Charter Schools Association (CCSA) and Charter Schools Development Center (CSDC).

We also broaden our educators' training with specialized sessions such as AVID training to bolster college readiness and the UC conference to align with university standards. Also, our staff partakes in targeted professional development focused on special education, ensuring that they are proficient in the latest methodologies and practices.

Our efforts are further supported by Professional Learning Communities (PLCs) which foster collaborative learning and data-driven decision-making. This collaborative environment allows educators to share insights and strategies, enhancing educational practices. ??Live instruction training is another critical component of our professional development program, ensuring that our educators are proficient in engaging students effectively in a dynamic and increasingly digital learning environment.

In addition, we provide leadership development opportunities for advancement pathways, ensuring a continuous cycle of professional growth and leadership within our school community.

We continually assess the effectiveness of our professional development programs through regular feedback, allowing us to align our strategies closely with both our educational goals and the evolving needs of the school. This comprehensive approach not only supports the professional growth of our educators but also enhances the overall educational experience for our students, ensuring that every member of our school community is equipped to thrive in an ever-changing educational landscape.

Prioritizing Funding

ESSA SECTION 2102(b)(2)(C)

Provide a description of how the LEA will prioritize funds to schools served by the agency that are implementing comprehensive support and improvement activities and targeted support and improvement activities under Section 1111(d) and have the highest percentage of children counted under Section 1124(c).

Address these questions:

1. Please describe the LEA's process for determining Title II, Part A funding among the schools it serves.
2. Please describe how the LEA determines funding that prioritizes CSI and TSI schools and schools serving the highest percentage of children counted under Section 1124(c).
3. Please describe how CSI and TSI schools and schools that have the highest percentage of children counted under Section 1124(c) that the LEA serves receive priority in Title II, Part A funding decisions compared to other schools the LEA serves.

THIS ESSA PROVISION IS ADDRESSED BELOW:

N/A

Data and Ongoing Consultation to Support Continuous Improvement

ESSA SECTION 2102(b)(2)(D)

Provide a description of how the LEA will use data and ongoing consultation described in Section 2102(b)(3) to continually update and improve activities supported under this part.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Address these questions:

1. Please explain how the LEA coordinates its Title II, Part A activities with other related strategies, programs, and activities.
2. Please describe how the LEA uses data to continually update and improve activities supported under Title II, Part A.
3. Please describe how the LEA uses ongoing consultation described in Section 2102(b)(3) to continually update and improve activities supported under Title II, Part A.
4. Please describe the sources of data the LEA monitors to evaluate Title II, Part A activities and how often it analyzes this data.
5. Please describe the ways in which the LEA meaningfully consults with the following educational partners to update and improve Title II, Part A-funded activities:
    a. Teachers
    b. Principals and other school leaders
    c. Paraprofessionals (including organizations representing such individuals)
    d. Specialized instructional support personnel
    e. Charter school leaders (in a local educational agency that has charter schools)
    f. Parents
    g. Community partners
    h. Organizations or partners with relevant and demonstrated expertise in programs and activities
6. Please explain how often the LEA meaningfully consults with these educational partners.

At Sage Oak, our approach to continuous improvement under Title II, Part A, revolves around a robust system of data analysis and ongoing consultation. We integrate Title II activities with our broader educational strategies, ensuring alignment with our holistic educational goals, such as those outlined in our Local Control and Accountability Plan (LCAP).

We employ a data-driven approach to monitor and refine professional development activities. This includes regular analysis of student performance data, staff feedback on professional development sessions, and other relevant metrics. Our Professional Learning Communities (PLCs) play a crucial role here, enabling educators to discuss and implement strategies based on data insights.

Sage Oak conducts evaluations of Title II, Part A activities throughout the academic year. This regular monitoring allows us to stay responsive to the needs of our educators and students, adapting our strategies to maximize effectiveness.

Our consultation process is inclusive, involving a wide range of stakeholders. We engage with teachers, principals, specialized instructional support personnel, and charter school leaders to ensure diverse perspectives are considered.

Community partners and organizations with relevant expertise are also involved, enriching our professional development programs.

By systematically integrating feedback and data into our professional development initiatives, Sage Oak Charter School ensures that our educational practices are not only aligned with current needs but are also poised for future success, fulfilling our commitment to continuous improvement.

TITLE III, PART A

Title III Professional Development

ESSA SECTION 3115(c)(2)

Describe how the eligible entity will provide effective professional development to classroom teachers, principals and other school leaders, administrators, and other school or community-based organizational personnel.

Complete responses will:

Address professional development activities specific to English learners/Title III purposes that are:

1. designed to improve the instruction and assessment of English learners;
2. designed to enhance the ability of such teachers, principals, and other school leaders to understand and implement curricula, assessment practices and measures, and instructional strategies for English learners;
3. effective in increasing children's English language proficiency or substantially increasing the subject matter knowledge, teaching knowledge, and teaching skills of such teachers;
4. of sufficient intensity and duration (which shall not include activities such as one-day or short-term workshops and conferences) to have a positive and lasting impact on the teachers' performance in the classroom; and
5. supplemental to all other funding sources for which the LEA is eligible.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Enhanced Instructional Opportunities

ESSA SECTIONS 3115(e)(1) and 3116

Describe how the eligible entity will provide enhanced instructional opportunities for immigrant children and youth.

Complete responses will:

1. Describe the activities implemented, supplemental to all other funding sources for which the LEA is eligible, that provide enhanced instructional opportunities for immigrant children and youth.

THIS ESSA PROVISION IS ADDRESSED BELOW:

Title III Programs and Activities

ESSA SECTIONS 3116(b)(1)

Describe the effective programs and activities, including language instruction educational programs, proposed to be developed, implemented, and administered under the subgrant that will help English learners increase their English language proficiency and meet the challenging State academic standards.

Complete responses will:

1. Address the effective language instruction programs specific to English learners.
2. Address Title III activities that:
   - are focused on English learners and consistent with the purposes of Title III;
   - enhance the core program; and
   - are supplemental to all other funding sources for which the LEA is eligible.

THIS ESSA PROVISION IS ADDRESSED BELOW:

English Proficiency and Academic Achievement

ESSA SECTIONS 3116(b)(2)(A-B)

Describe how the eligible entity will ensure that elementary schools and secondary schools receiving funds under Subpart 1 assist English learners in:

(A) achieving English proficiency based on the State's English language proficiency assessment under Section 1111(b)(2)(G), consistent with the State's long-term goals, as described in Section 1111(c)(4)(A)(ii); and
(B) meeting the challenging State academic standards.

Complete responses will:

1. Address how sites will be held accountable for meeting English acquisition progress and achievement goals for English learners.
2. Address site activities that are supplemental to all other funding sources for which the LEA is eligible.

THIS ESSA PROVISION IS ADDRESSED BELOW:

TITLE IV, PART A

Title IV, Part A Activities and Programs

ESSA SECTION 4106(e)(1)

Each LEA, or consortium of LEAs, shall conduct the Title IV needs assessment once every 3 years. (see below)

Describe the activities and programming that the LEA, or consortium of such agencies, will carry out under Subpart 1, including a description of:

(A) any partnership with an institution of higher education, business, nonprofit organization, community-based organization, or other public or private entity with a demonstrated record of success in implementing activities under this subpart;
(B) if applicable, how funds will be used for activities related to supporting well-rounded education under Section 4107;
(C) if applicable, how funds will be used for activities related to supporting safe and healthy students under Section 4108;
(D) if applicable, how funds will be used for activities related to supporting the effective use of technology in schools under Section 4109; and
(E) the program objectives and intended outcomes for activities under Subpart 1, and how the LEA, or consortium of such agencies, will periodically evaluate the effectiveness of the activities carried out under this section based on such objectives and outcomes.

NOTE: If the LEA received more than $30,000 in Title IV, Part A funding and did not transfer the allocation, the LEA must:

1. use not less than 20 percent of Title IV, Part A funds to support one or more safe and healthy student activities;
2. use not less than 20 percent of Title IV, Part A funds to support one or more well-rounded education activities;
3. use a portion of Title IV, Part A funds to support one or more effective use of technology activities; and
   a) 15 percent max cap on effective use of technology for purchasing technology infrastructure.

THIS ESSA PROVISION IS ADDRESSED BELOW:

At Sage Oak, our utilization of Title IV, Part A funds is closely aligned with LCAP Goal 3, which focuses on enhancing our technological capabilities to support personalized learning and operational efficiency. We invest in innovative educational technologies, including the development and integration of AI-driven tools. These technologies are designed to tailor learning experiences to individual student needs and streamline administrative processes, thereby enhancing educational outcomes and operational efficacy.

Our objective with these funds is to not only integrate cutting-edge technology into our curriculum but also to ensure these tools effectively support our educational goals. We periodically evaluate the effectiveness of these technological interventions by analyzing student engagement metrics, academic performance data, and operational efficiency indicators. This ongoing assessment helps us refine our technology strategy to ensure it remains aligned with the evolving needs of our students and the broader educational landscape, maintaining our commitment to providing a high-quality, future-ready education.

Title IV, Part A Needs Assessment

According to the Every Student Succeeds Act (ESSA), all local educational agencies (LEAs) receiving at least $30,000 must conduct a needs assessment specific to Title IV, Part A (ESSA Section 4106[f]). Each LEA, or consortium of LEAs, shall conduct the needs assessment once every three year (ESSA Section 4106[d][3]).

Well-rounded Education Opportunities (ESSA Section 4107)

Identify any indicators, or measures/data points to examine needs for improvement of the Title IV, Part A priority content areas.

What activities will be included within the support for a well-rounded education?

How will the activities be evaluated for the effectiveness of strategies and activities funded under Title IV, Part A. Include the indicators, or measures/data points used to determine future program planning?

Safe and Healthy Students (ESSA Section 4108)

Identify any indicators, or measures/data points to examine needs for improvement of the Title IV, Part A priority content areas.

What activities will be included within the support for safety and health of students?

How will the activities be evaluated for the effectiveness of strategies and activities funded under Title IV, Part A. Include the indicators, or measures/data points used to determine future program planning?

Effective Use of Technology (ESSA Section 4109)

Identify any indicators, or measures/data points to examine needs for improvement of the Title IV, Part A priority content areas.

What activities will be included within the support of effective use of technology? Note: No more than 15 percent on technology infrastructure (ESSA Section 4109[b])

How will the activities be evaluated for the effectiveness of strategies and activities funded under Title IV, Part A. Include the indicators, or measures/data points used to determine future program planning?

- Note: All planned activities must meet the authorized use of funds criteria located on the Title IV, Part A Authorized Use of Funds web page at https://www.cde.ca.gov/sp/st/tivpaauthuseoffunds.asp.

Date of LEA's last conducted needs assessment:

Title IV, Part A Program
Rural Education and Student Support Office
California Department of Education
Email: TitleIV@cde.ca.gov Web site: https://www.cde.ca.gov/sp/st/

California Department of Education
February 2022

2026-27 LCFF Budget Overview for Parents Data Input Sheet

Local Educational Agency (LEA) Name:	Sage Oak Charter School
CDS Code:	36-67736-0136069
LEA Contact Information:	Name: Krista Woodgrift Position: Superintendent Email: kwoodgrift@sageoak.education Phone: 888-435-4445
Coming School Year:	2026-27
Current School Year:	2025-26

*NOTE: The "High Needs Students" referred to in the tables below are Unduplicated Students for LCFF funding purposes.

Projected General Fund Revenue for the 2026-27 School Year	**Amount** **Whole Numbers**
Total LCFF Funds	$62,116,084
LCFF Supplemental & Concentration Grants	$5,727,140
All Other State Funds	$10,725,813
All Local Funds	$509,562
All federal funds	$1,385,601
Total Projected Revenue	$74,737,060

Total Budgeted Expenditures for the 2026-27 School Year	**Amount** **Whole Numbers**
Total Budgeted General Fund Expenditures	$73,368,933
Total Budgeted Expenditures in the LCAP	$69,450,915
Total Budgeted Expenditures for High Needs Students in the LCAP	$52,051,000
Expenditures not in the LCAP	$3,918,018

Expenditures for High Needs Students in the 2025-26 School Year	**Amount** **Whole Numbers**
Total Budgeted Expenditures for High Needs Students in the LCAP	$41,983,385
Actual Expenditures for High Needs Students in LCAP	$42,322,736

Funds for High Needs Students	**Amount** **[AUTO-CALCULATED]**
2026-27 Difference in Projected Funds and Budgeted Expenditures	$46,323,860
2025-26 Difference in Budgeted and Actual Expenditures	$339,351

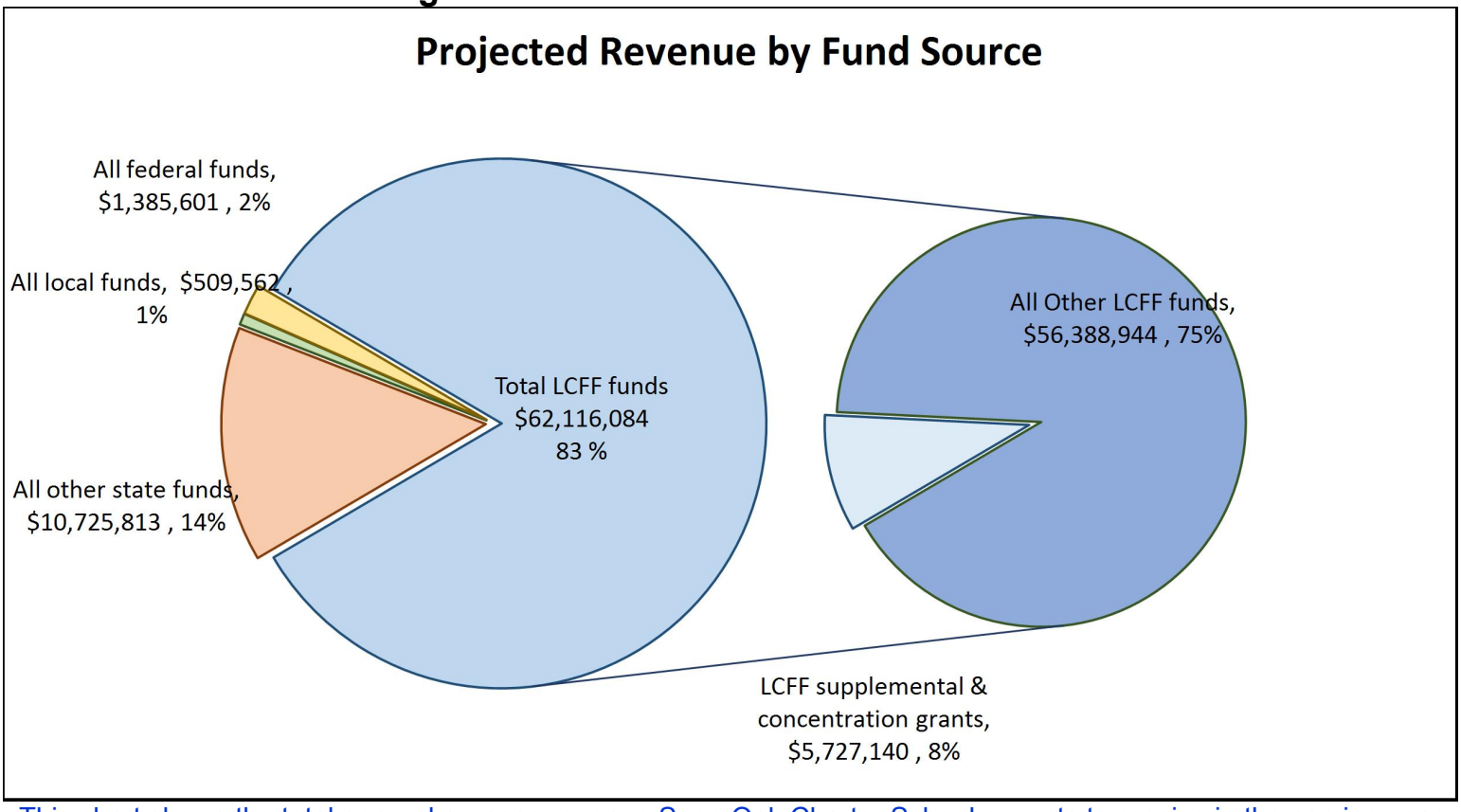
Required Prompts(s)	**Response(s)** **[FIELDS WILL APPEAR IF REQUIRED]**
Briefly describe any of the General Fund Budget Expenditures for the school year not included in the Local Control and Accountability Plan (LCAP).	Certain expenditures such as charter oversight fees, human resources administration, legal and compliance services, insurance, rent, and utilities, are necessary operational costs incurred to maintain Sage Oak's educational program and organization infrastructure.

LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Sage Oak Charter School
CDS Code: 36-67736-0136069
School Year: 2026-27
LEA contact information:
Krista Woodgrift
Superintendent
kwoodgrift@sageoak.education
888-435-4445

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

Budget Overview for the 2026-27 School Year

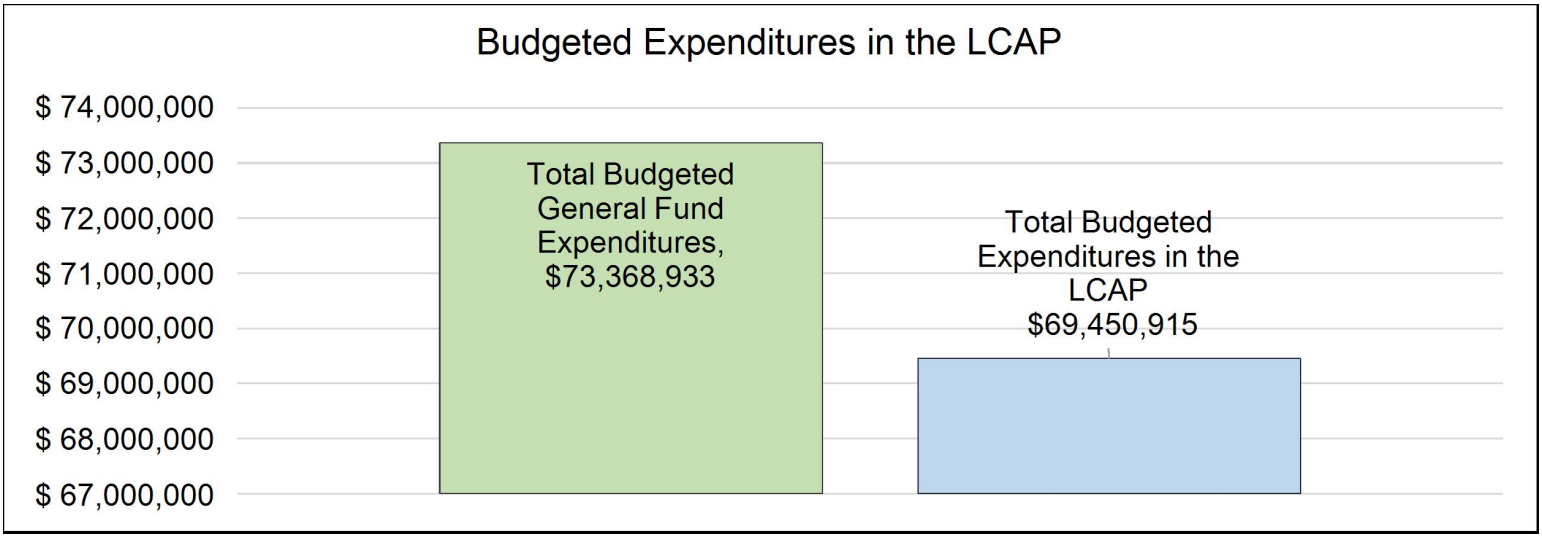


This chart shows the total general purpose revenue Sage Oak Charter School expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Sage Oak Charter School is $74,737,060, of which $62,116,084 is Local Control Funding Formula (LCFF), $10,725,813 is other state funds, $509,562 is local funds, and $1,385,601 is federal funds. Of the $62,116,084 in LCFF Funds, $5,727,140 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Sage Oak Charter School plans to spend for 2026-27. It shows how much of the total is tied to planned actions and services in the LCAP.

The text description of the above chart is as follows: Sage Oak Charter School plans to spend $73,368,933 for the 2026-27 school year. Of that amount, $69,450,915 is tied to actions/services in the LCAP and $3,918,018 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

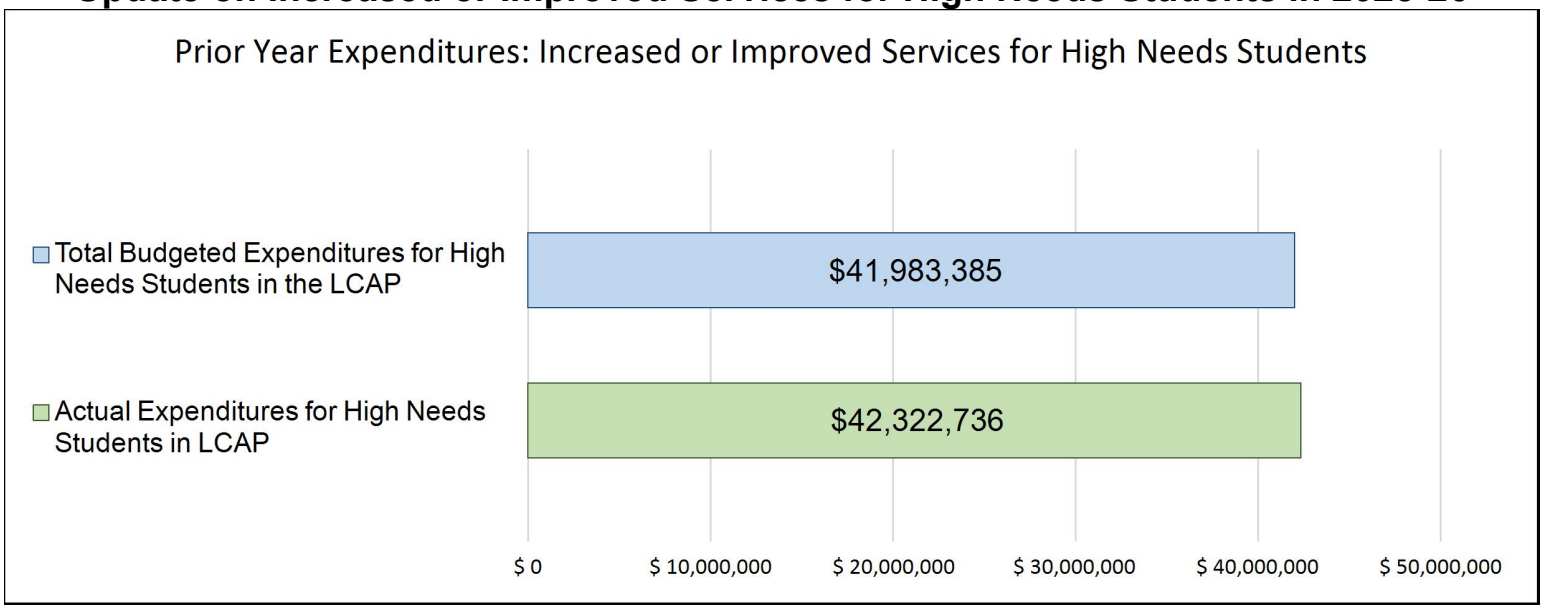
Certain expenditures such as charter oversight fees, human resources administration, legal and compliance services, insurance, rent, and utilities, are necessary operational costs incurred to maintain Sage Oak's educational program and organization infrastructure.

Increased or Improved Services for High Needs Students in the LCAP for the 2026-27 School Year

In 2026-27, Sage Oak Charter School is projecting it will receive $5,727,140 based on the enrollment of foster youth, English learner, and low-income students. Sage Oak Charter School must describe how it intends to increase or improve services for high needs students in the LCAP. Sage Oak Charter School plans to spend $52,051,000 towards meeting this requirement, as described in the LCAP.

LCFF Budget Overview for Parents

Update on Increased or Improved Services for High Needs Students in 2025-26



This chart compares what Sage Oak Charter School budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Sage Oak Charter School estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2025-26, Sage Oak Charter School's LCAP budgeted $41,983,385 for planned actions to increase or improve services for high needs students. Sage Oak Charter School actually spent $42,322,736 for actions to increase or improve services for high needs students in 2025-26.

2026-27 LCFF Budget Overview for Parents Data Input Sheet

Local Educational Agency (LEA) Name:	Sage Oak Charter School- Keppel
CDS Code:	19-64642-0136127
LEA Contact Information:	Name: Krista Woodgrift Position: Superintendent Email: kwoodgrift@sageoak.education Phone: 888-435-4445
Coming School Year:	2026-27
Current School Year:	2025-26

*NOTE: The "High Needs Students" referred to in the tables below are Unduplicated Students for LCFF funding purposes.

Projected General Fund Revenue for the 2026-27 School Year	**Amount** **Whole Numbers**
Total LCFF Funds	$8,306,778
LCFF Supplemental & Concentration Grants	$807,698
All Other State Funds	$1,342,334
All Local Funds	$73,316
All federal funds	$169,088
Total Projected Revenue	$9,891,516

Total Budgeted Expenditures for the 2026-27 School Year	**Amount** **Whole Numbers**
Total Budgeted General Fund Expenditures	$9,710,213
Total Budgeted Expenditures in the LCAP	$9,331,761
Total Budgeted Expenditures for High Needs Students in the LCAP	$7,056,161
Expenditures not in the LCAP	$378,452

Expenditures for High Needs Students in the 2025-26 School Year	**Amount** **Whole Numbers**
Total Budgeted Expenditures for High Needs Students in the LCAP	$4,785,098
Actual Expenditures for High Needs Students in LCAP	$5,591,582

Funds for High Needs Students	**Amount** **[AUTO-CALCULATED]**
2026-27 Difference in Projected Funds and Budgeted Expenditures	$6,248,463
2025-26 Difference in Budgeted and Actual Expenditures	$806,484

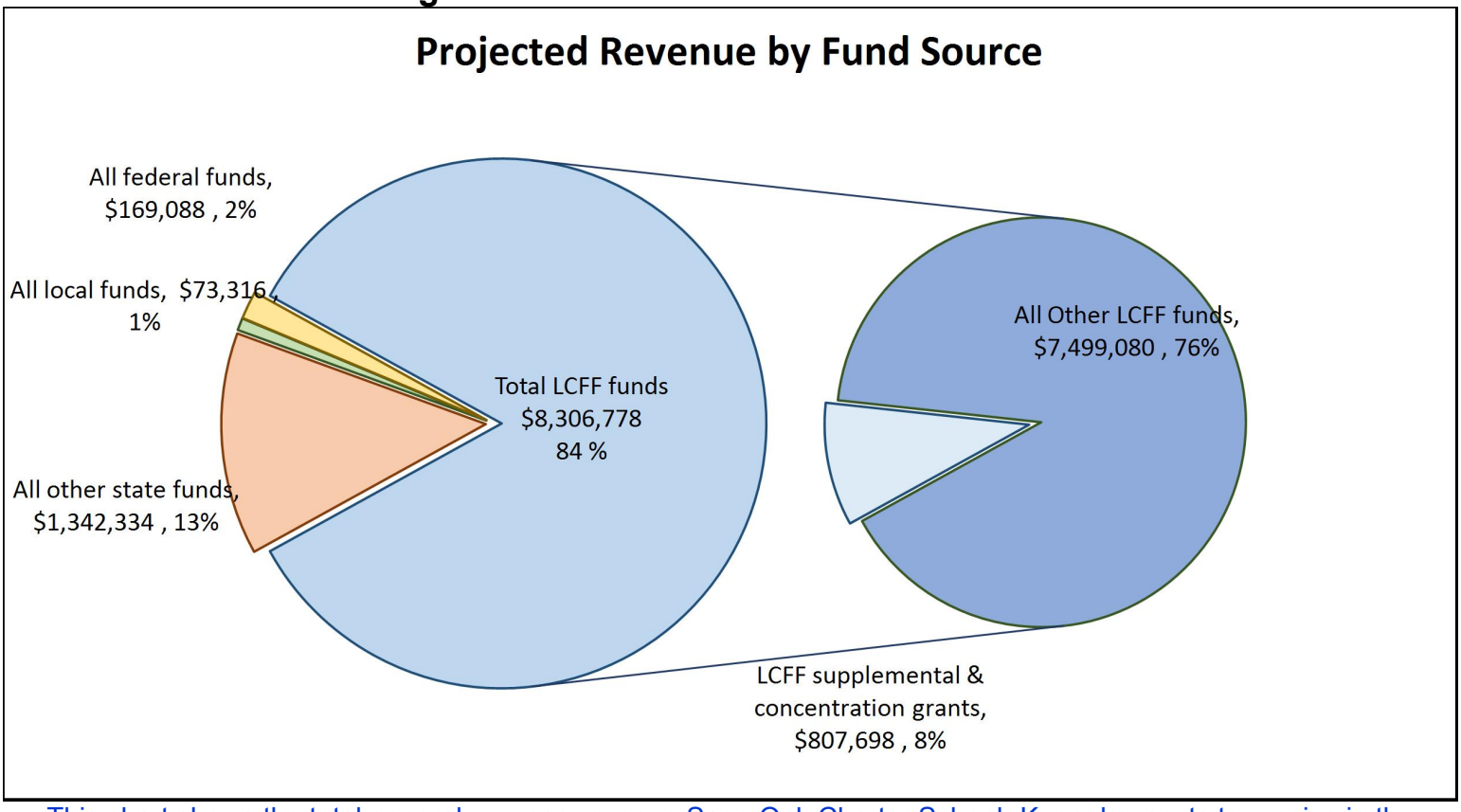
Required Prompts(s)	**Response(s)** **[FIELDS WILL APPEAR IF REQUIRED]**
Briefly describe any of the General Fund Budget Expenditures for the school year not included in the Local Control and Accountability Plan (LCAP).	Certain expenditures such as charter oversight fees, human resources administration, legal and compliance services, insurance, rent, and utilities, are necessary operational costs incurred to maintain Sage Oak's educational program and organization infrastructure.

LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Sage Oak Charter School- Keppel
CDS Code: 19-64642-0136127
School Year: 2026-27
LEA contact information:
Krista Woodgrift
Superintendent
kwoodgrift@sageoak.education
888-435-4445

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

Budget Overview for the 2026-27 School Year

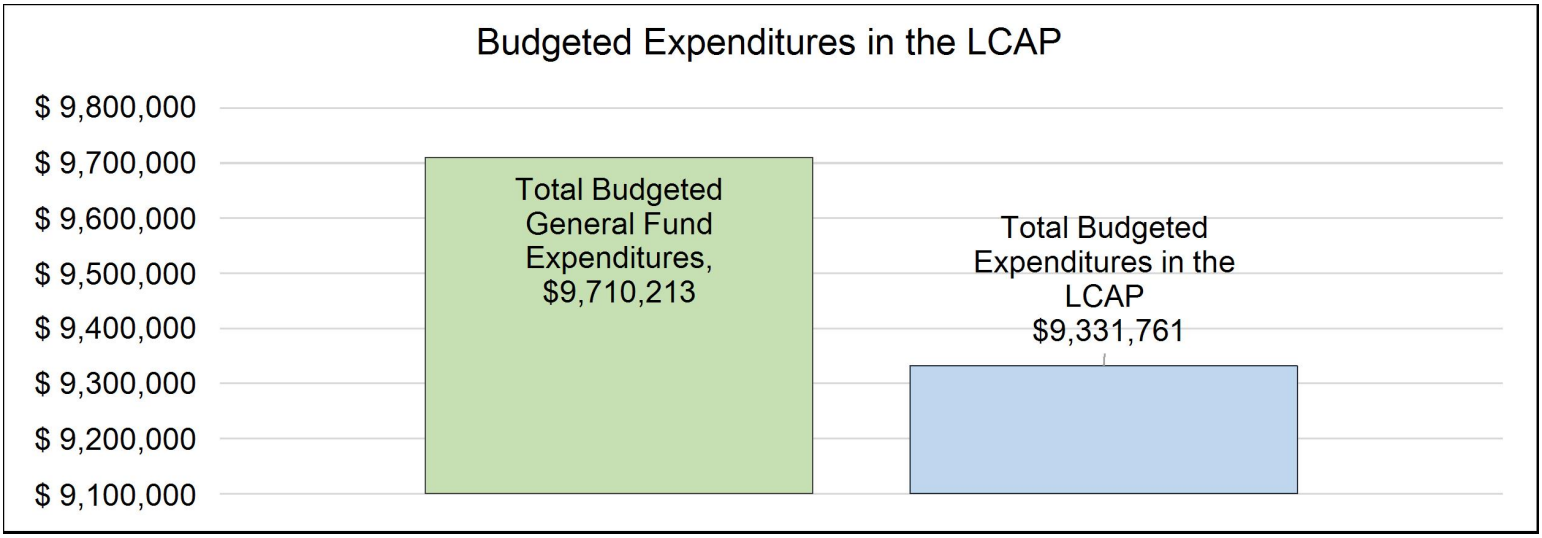


This chart shows the total general purpose revenue Sage Oak Charter School- Keppel expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Sage Oak Charter School-Keppel is $9,891,516, of which $8,306,778 is Local Control Funding Formula (LCFF), $1,342,334 is other state funds, $73,316 is local funds, and $169,088 is federal funds. Of the $8,306,778 in LCFF Funds, $807,698 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Sage Oak Charter School- Keppel plans to spend for 2026-27. It shows how much of the total is tied to planned actions and services in the LCAP.

The text description of the above chart is as follows: Sage Oak Charter School- Keppel plans to spend $9,710,213 for the 2026-27 school year. Of that amount, $9,331,761 is tied to actions/services in the LCAP and $378,452 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

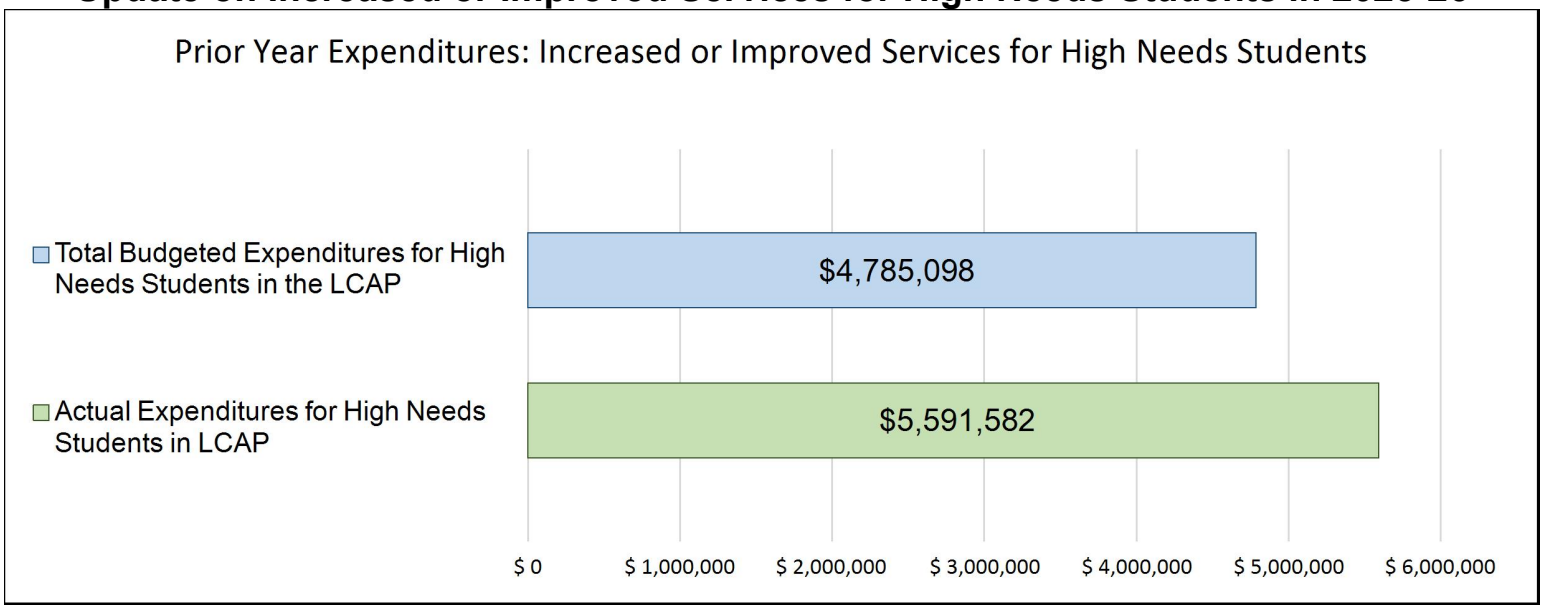
Certain expenditures such as charter oversight fees, human resources administration, legal and compliance services, insurance, rent, and utilities, are necessary operational costs incurred to maintain Sage Oak's educational program and organization infrastructure.

Increased or Improved Services for High Needs Students in the LCAP for the 2026-27 School Year

In 2026-27, Sage Oak Charter School- Keppel is projecting it will receive $807,698 based on the enrollment of foster youth, English learner, and low-income students. Sage Oak Charter School- Keppel must describe how it intends to increase or improve services for high needs students in the LCAP. Sage Oak Charter School- Keppel plans to spend $7,056,161 towards meeting this requirement, as described in the LCAP.

LCFF Budget Overview for Parents

Update on Increased or Improved Services for High Needs Students in 2025-26



This chart compares what Sage Oak Charter School- Keppel budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Sage Oak Charter School- Keppel estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2025-26, Sage Oak Charter School- Keppel's LCAP budgeted $4,785,098 for planned actions to increase or improve services for high needs students. Sage Oak Charter School- Keppel actually spent $5,591,582 for actions to increase or improve services for high needs students in 2025-26.

2026-27 LCFF Budget Overview for Parents Data Input Sheet

Local Educational Agency (LEA) Name:	Sage Oak Charter School- South
CDS Code:	37-75416-0139378
LEA Contact Information:	Name: Krista Woodgrift Position: Superintendent Email: kwoodgrift@sageoak.education Phone: 888-435-4445
Coming School Year:	2026-27
Current School Year:	2025-26

*NOTE: The "High Needs Students" referred to in the tables below are Unduplicated Students for LCFF funding purposes.

Projected General Fund Revenue for the 2026-27 School Year	**Amount** **Whole Numbers**
Total LCFF Funds	$10,358,376
LCFF Supplemental & Concentration Grants	$845,122
All Other State Funds	$1,648,580
All Local Funds	$230,236
All federal funds	$189,924
Total Projected Revenue	$12,427,116

Total Budgeted Expenditures for the 2026-27 School Year	**Amount** **Whole Numbers**
Total Budgeted General Fund Expenditures	$12,194,366
Total Budgeted Expenditures in the LCAP	$11,719,002
Total Budgeted Expenditures for High Needs Students in the LCAP	$8,940,537
Expenditures not in the LCAP	$475,364

Expenditures for High Needs Students in the 2025-26 School Year	**Amount** **Whole Numbers**
Total Budgeted Expenditures for High Needs Students in the LCAP	$6,365,943
Actual Expenditures for High Needs Students in LCAP	$7,461,661

Funds for High Needs Students	**Amount** **[AUTO-CALCULATED]**
2026-27 Difference in Projected Funds and Budgeted Expenditures	$8,095,415
2025-26 Difference in Budgeted and Actual Expenditures	$1,095,718

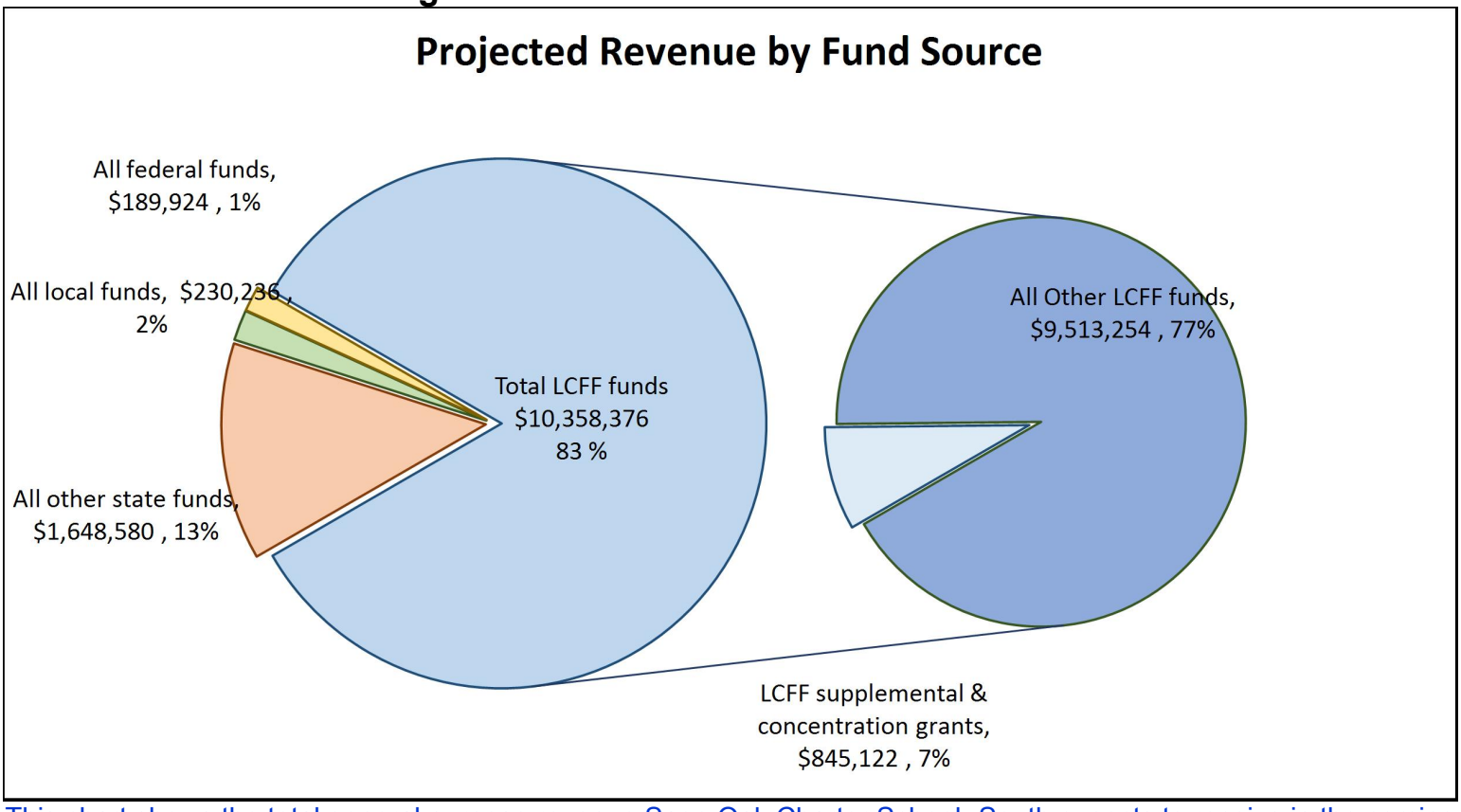
Required Prompts(s)	**Response(s)** **[FIELDS WILL APPEAR IF REQUIRED]**
Briefly describe any of the General Fund Budget Expenditures for the school year not included in the Local Control and Accountability Plan (LCAP).	Certain expenditures such as charter oversight fees, human resources administration, legal and compliance services, insurance, rent, and utilities, are necessary operational costs incurred to maintain Sage Oak's educational program and organization infrastructure.

LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Sage Oak Charter School- South
CDS Code: 37-75416-0139378
School Year: 2026-27
LEA contact information:
Krista Woodgrift
Superintendent
kwoodgrift@sageoak.education
888-435-4445

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

Budget Overview for the 2026-27 School Year

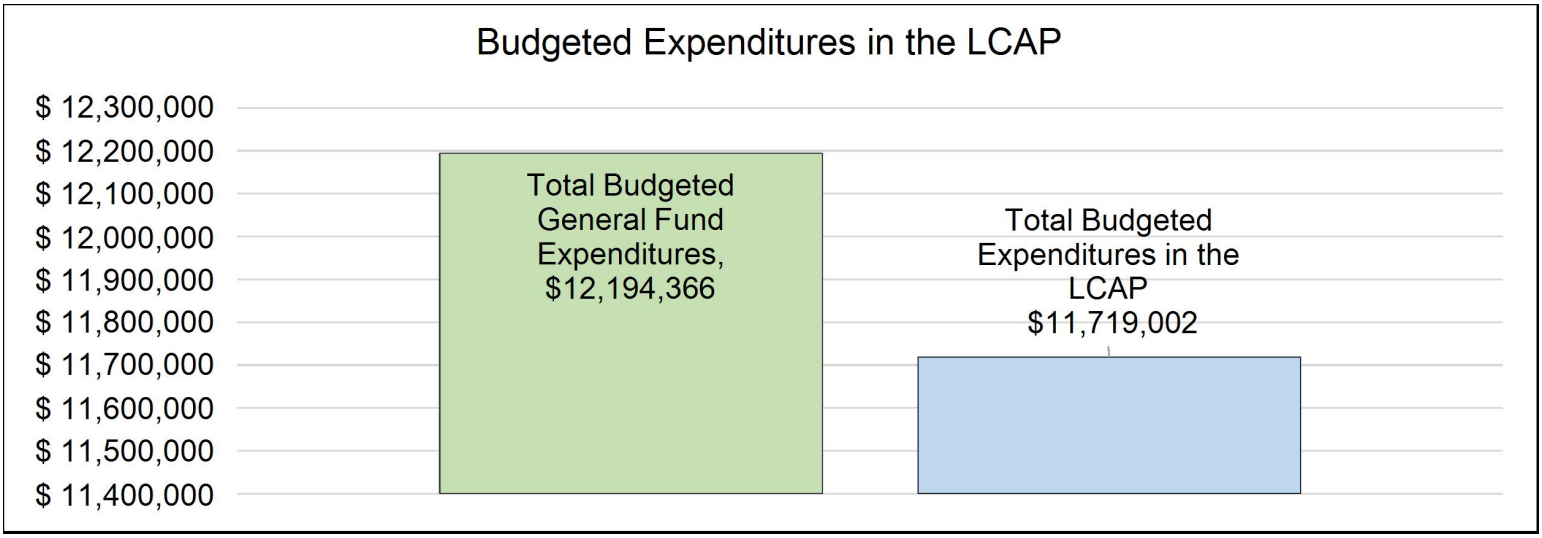


This chart shows the total general purpose revenue Sage Oak Charter School- South expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Sage Oak Charter School- South is $12,427,116, of which $10,358,376 is Local Control Funding Formula (LCFF), $1,648,580 is other state funds, $230,236 is local funds, and $189,924 is federal funds. Of the $10,358,376 in LCFF Funds, $845,122 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Sage Oak Charter School- South plans to spend for 2026-27. It shows how much of the total is tied to planned actions and services in the LCAP.

The text description of the above chart is as follows: Sage Oak Charter School- South plans to spend $12,194,366 for the 2026-27 school year. Of that amount, $11,719,002 is tied to actions/services in the LCAP and $475,364 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

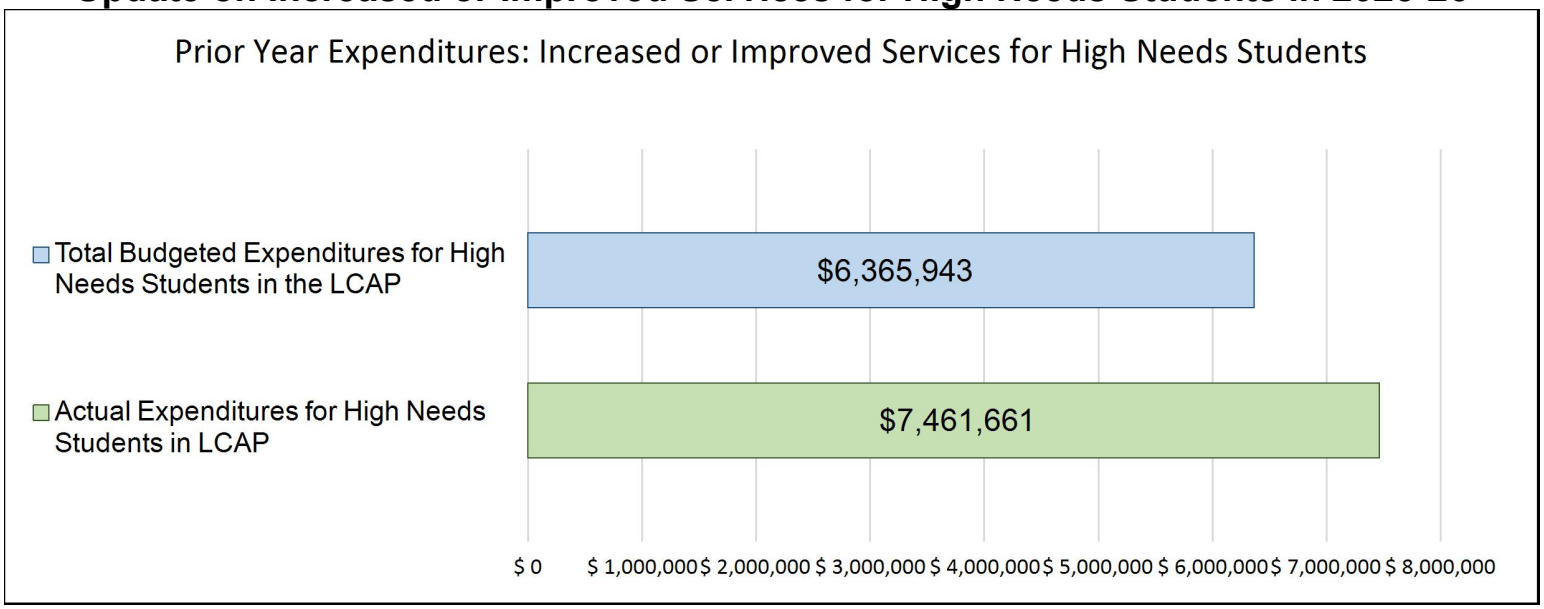
Certain expenditures such as charter oversight fees, human resources administration, legal and compliance services, insurance, rent, and utilities, are necessary operational costs incurred to maintain Sage Oak's educational program and organization infrastructure.

Increased or Improved Services for High Needs Students in the LCAP for the 2026-27 School Year

In 2026-27, Sage Oak Charter School- South is projecting it will receive $845,122 based on the enrollment of foster youth, English learner, and low-income students. Sage Oak Charter School- South must describe how it intends to increase or improve services for high needs students in the LCAP. Sage Oak Charter School- South plans to spend $8,940,537 towards meeting this requirement, as described in the LCAP.

LCFF Budget Overview for Parents

Update on Increased or Improved Services for High Needs Students in 2025-26



This chart compares what Sage Oak Charter School- South budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Sage Oak Charter School- South estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2025-26, Sage Oak Charter School- South's LCAP budgeted $6,365,943 for planned actions to increase or improve services for high needs students. Sage Oak Charter School-South actually spent $7,461,661 for actions to increase or improve services for high needs students in 2025-26.

Coversheet

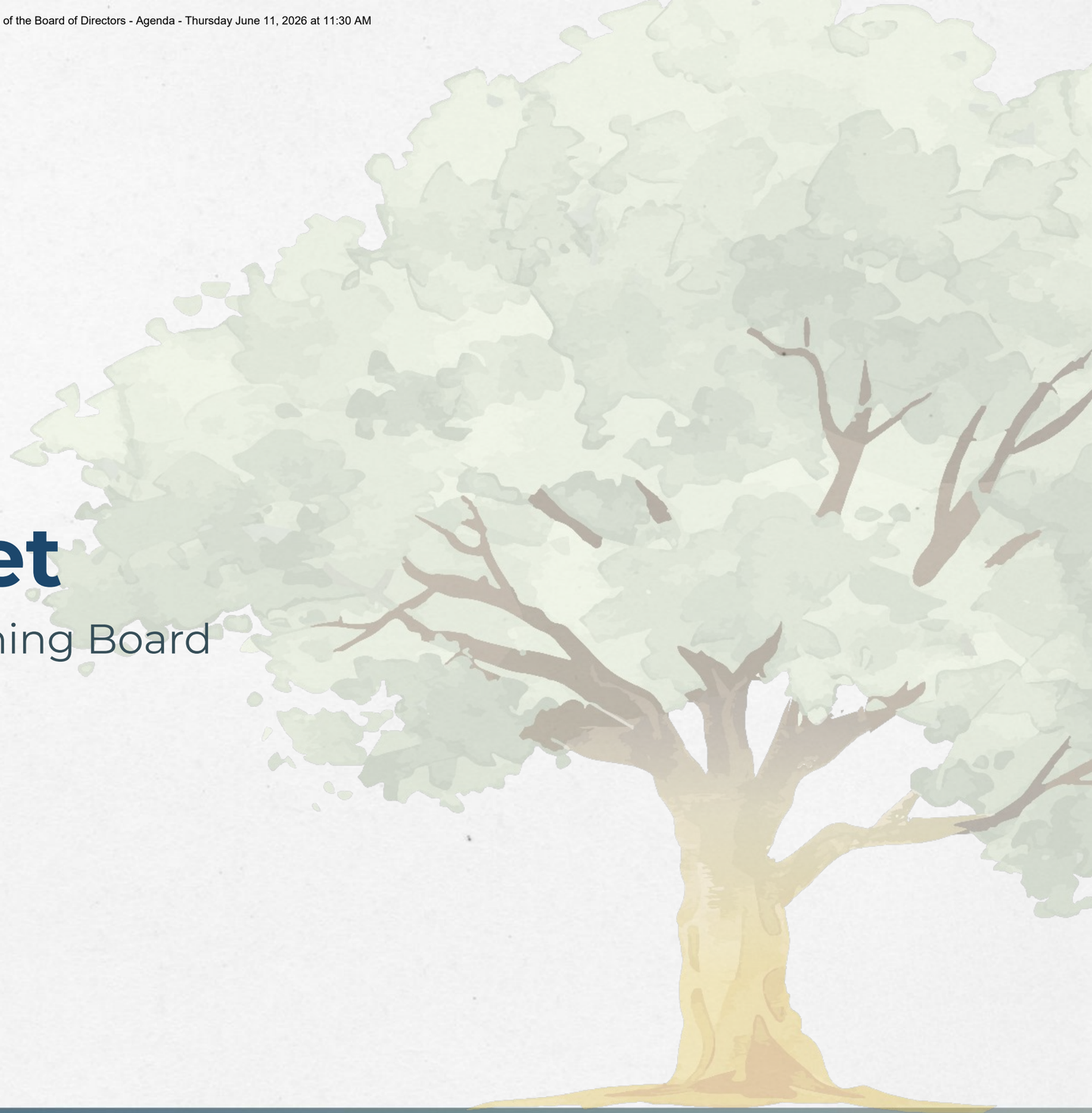
(Hearing) 2026-27 Proposed July Budget - Sage Oak Charter Schools

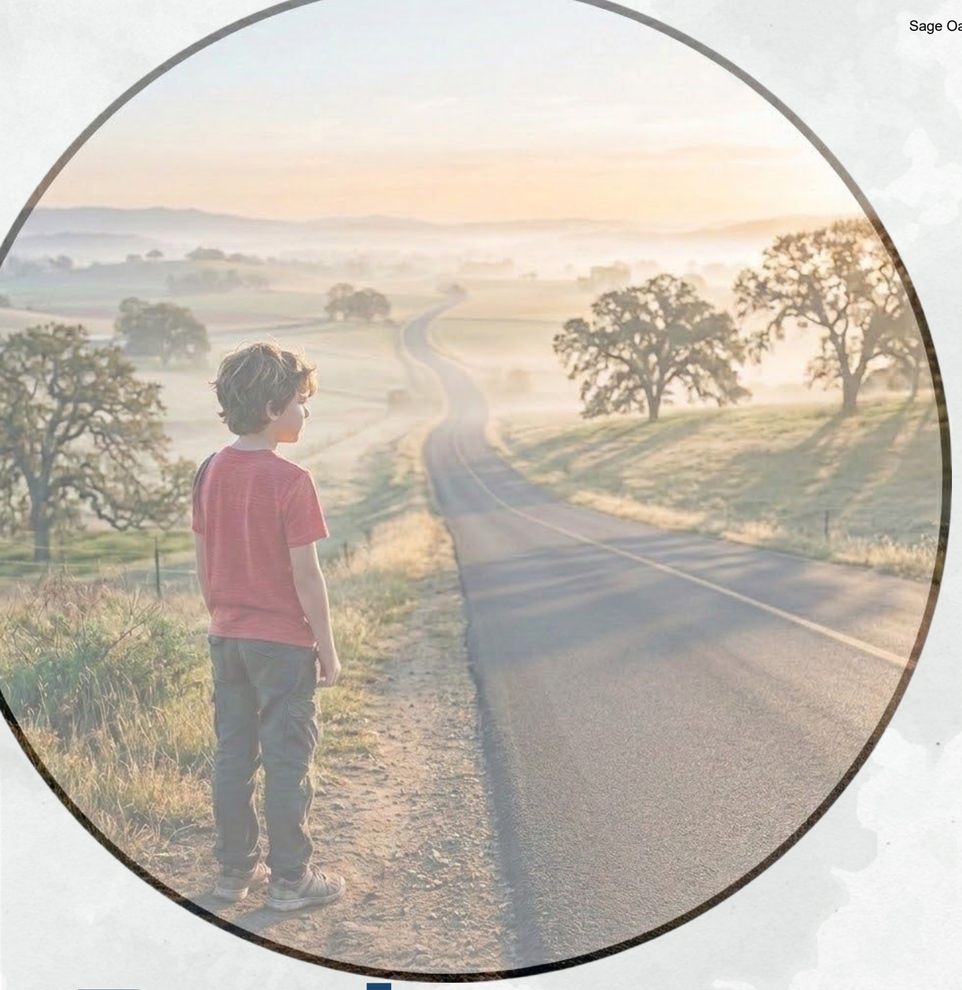
Section: XVII. Public Hearing
Item: B. (Hearing) 2026-27 Proposed July Budget - Sage Oak Charter Schools
Purpose: Discuss
Submitted by:
Related Material:
2026-27 Proposed July Budget_Sage Oak Charter Schools_Presentation.pdf
2026-27 Proposed July Budget_Sage Oak Charter Schools.pdf
2026-27 LCFF Budget Overview for Parents_Sage Oak Charter School (#1885).pdf
2026-27 LCFF Budget Overview for Parents_Sage Oak Charter School - Keppel (#1886).pdf
2026-27 LCFF Budget Overview for Parents_Sage Oak Charter School - South (#2051).pdf
EPA_Sage Oak Charter School (#1885).pdf
EPA_Sage Oak Charter School - South (#2051).pdf
EPA_Sage Oak Charter School - Keppel (#1886).pdf

SAGE OAK
CHARTER SCHOOLS

2026-27 July Budget

June 11, 2026, Presentation to the Governing Board





Budget Overview

1 Enrollment Growth

2 Financial Picture

3 The Road Ahead

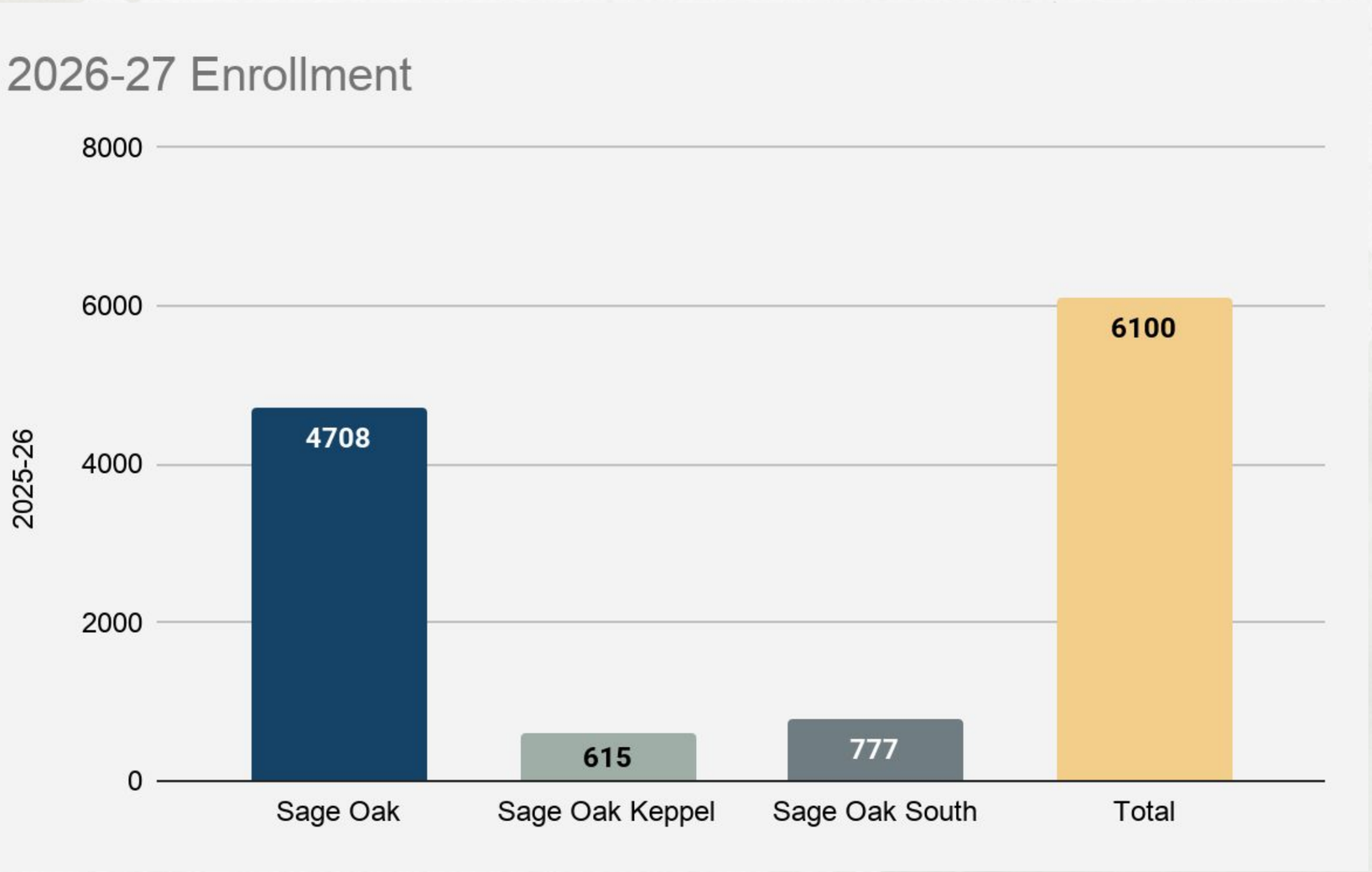
Enrollment

Sage Oak has experienced strong demand for its programs going into the 2025-26 school year. Management anticipates total growth of approximately 562 students, or just over 10%.

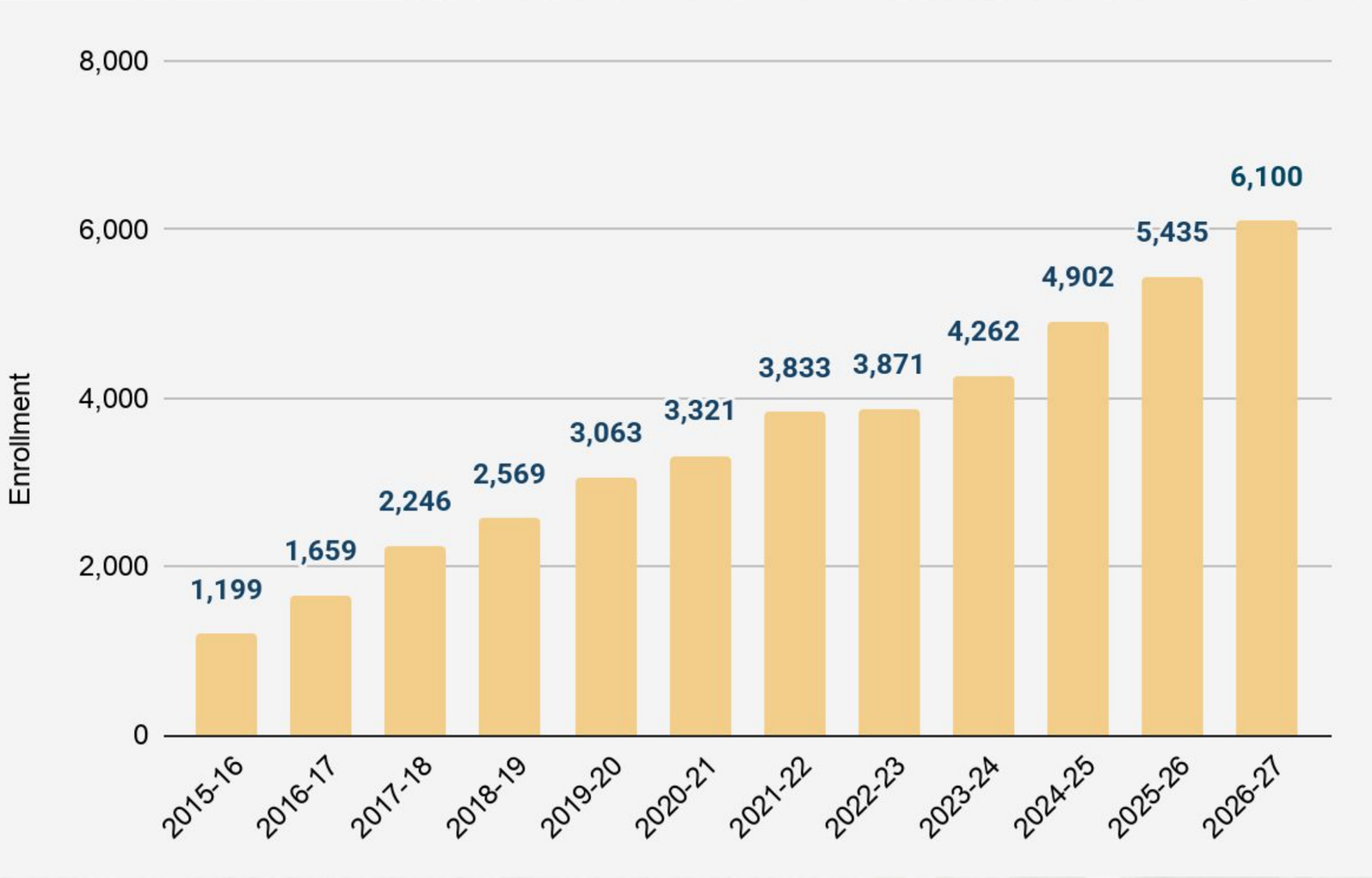
Sage Oak received **3,723** new student inquiries as of the week ending 5/22/26. The school is intentional about keeping the quality of its programs at the highest levels and prioritize this and student outcomes as success factors over big numbers.

3,723 New Student Inquiries

Enrollment Projections



Enrollment Growth



Sage Oak Charter Schools

Changes to 2026-27 Staffing Plan

New Positions

Education Services

- Teacher Positions
  - 14 FTE Personalized Learning Academy Teachers
  - 4.0 FTE Special Education Teachers
  - 4.0 FTE Virtual Learning Teachers
  - 1.0 FTE Intervention Teacher
  - 1.0 FTE Sports Academy TOSA (Athletics)
- 1.0 FTE High School Counselor
- 1.0 FTE Middle School Counselor
- 1.0 FTE Student Services Facilitator (MTSS)
- 1.0 FTE School Psychologist
- 1.0 FTE High School Facilitator
- 1.0 FTE Manager II, Oakschool
- 1.0 FTE Lead Manager III, Events (Reclass)
- 1.0 FTE Director II, Student Learning and Innovation

Sage Oak Charter Schools

Changes to 2026-27 Staffing Plan

New Positions

Business Services

- 1.0 FTE Chief Technology Officer
- 1.0 FTE Director I, Business Services (Reclass)
- 1.0 FTE Senior Administrator of IT, Data & Student Security (Reclass)

Operations and Accountability

- 1.0 FTE Chief of Outreach & Development (Reclass)
- Accountability Coordinator

Human Resources

- 1.0 FTE Director I, Compensation and Benefits (Reclass)
- 1.0 FTE Manager III, Compensation and Benefits

Sage Oak Charter Schools

Changes for 2026-27 Student Impact

Expanded Programs

- PAGE expanded to accommodate 255 students from 120
- Schoolwide and leadership ASB events
- College & career planning, incorporating staff training and 1:1 meetings with students
- Leadership opportunities such as Disney Leadership Day
- CASL (California Association of Student Leaders) conference for MS & HS
- Boston Field Trip for HS students

Instructional Funds

- Increased funding

Sage Oak Charter Schools

Assumptions

1. Enrollment to Average Daily Attendance (ADA), 99.2%

2. Unduplicated Pupil Percentage (UPP), 51%

3. Multi-Year Projection (MYP) COLA rates, 3.06% and 3.34% for 2027-2029

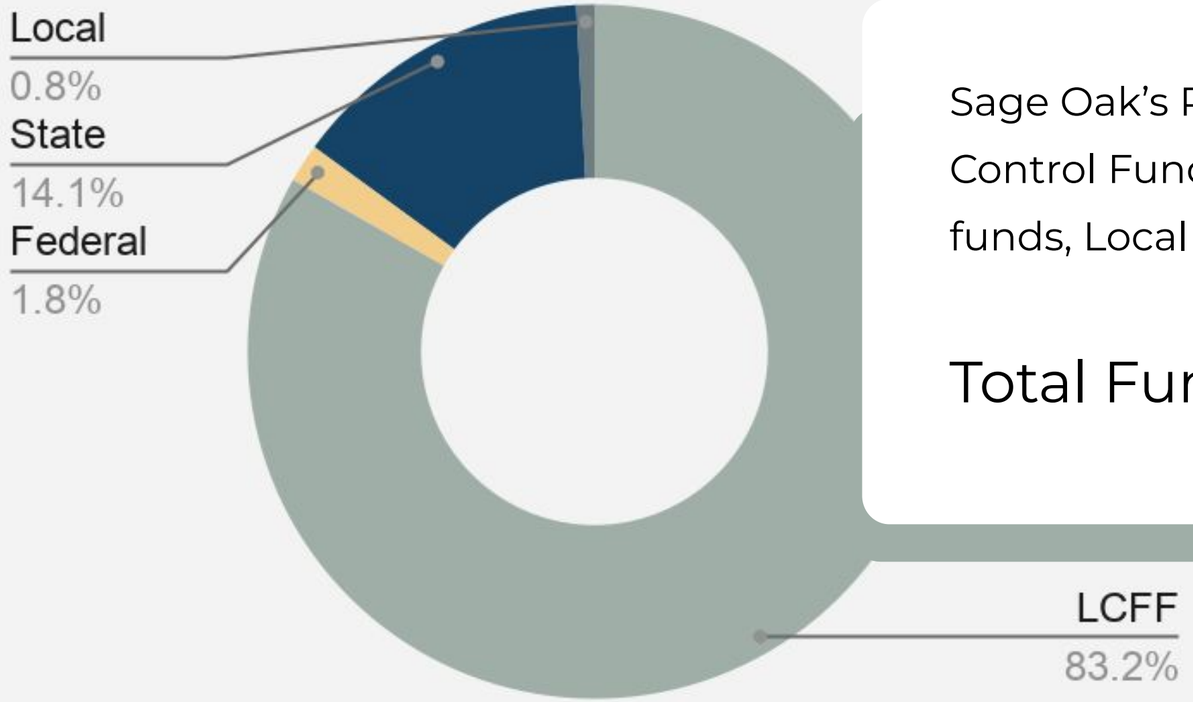
4. Participation in Federal Every Student Succeeds Act (ESSA) Programs, Title I, III, and IV

5. 2026-27 LCFF Revenue COLA funded at 4.31%

6. Internal Rate of Return for Local Revenue Interest, 3.3% and 3.1% for the County Treasury and Commercial Money Market sweep accounts

Sage Oak Charter Schools

Revenue



Sage Oak's Revenue is made up of four primary sources: Local Control Funding Formula (LCFF), a State provided fund, Federal funds, Local funds, and other Non-LCFF State funds.

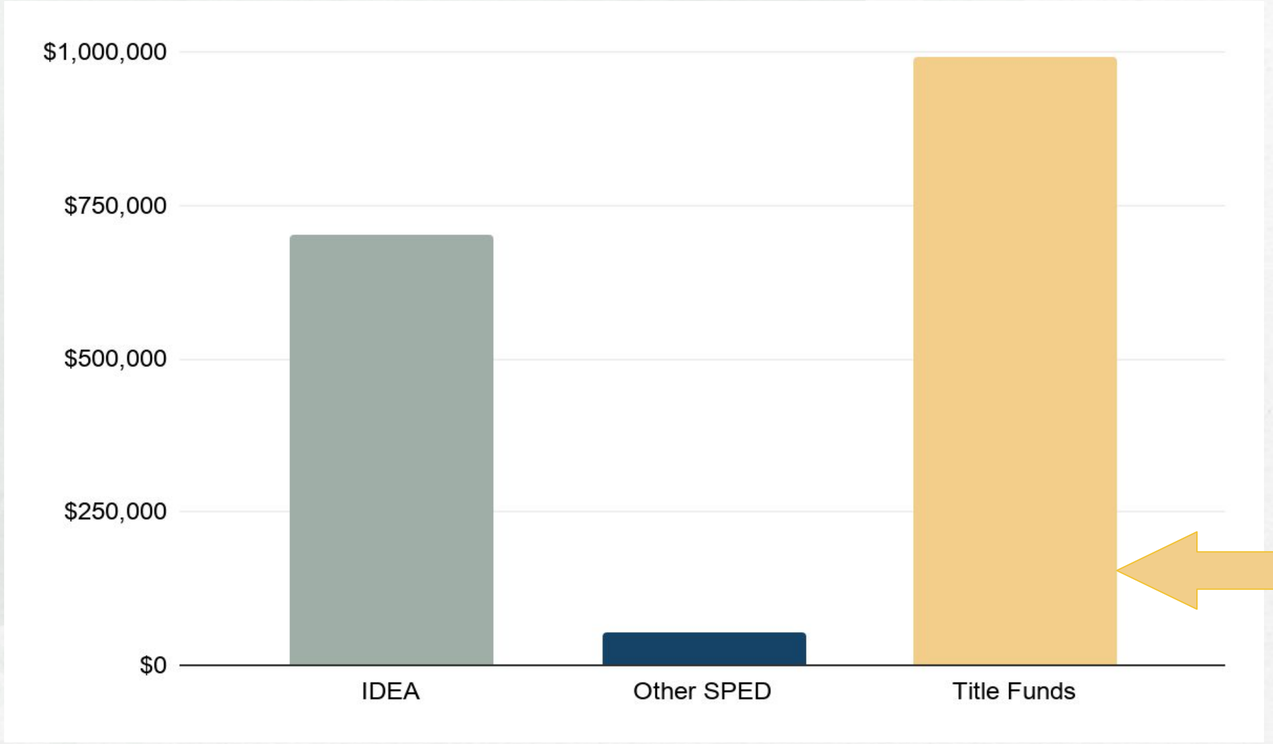
Total Funding for 2026-27, **$97,055,693**

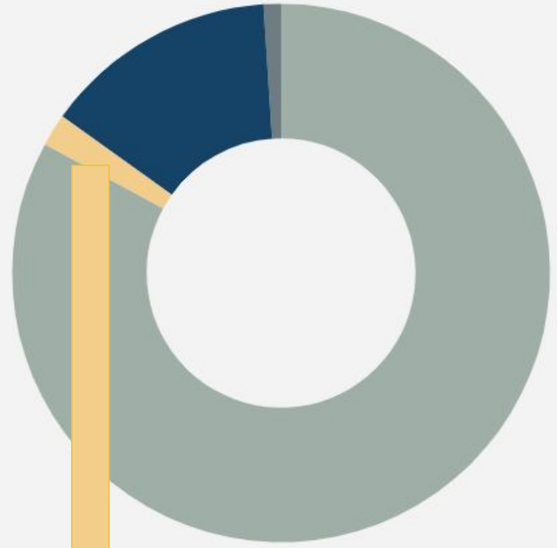
Sage Oak Charter Schools

Federal Funding

Federal funds make up 1.7%

of Sage Oak's total 2026-27



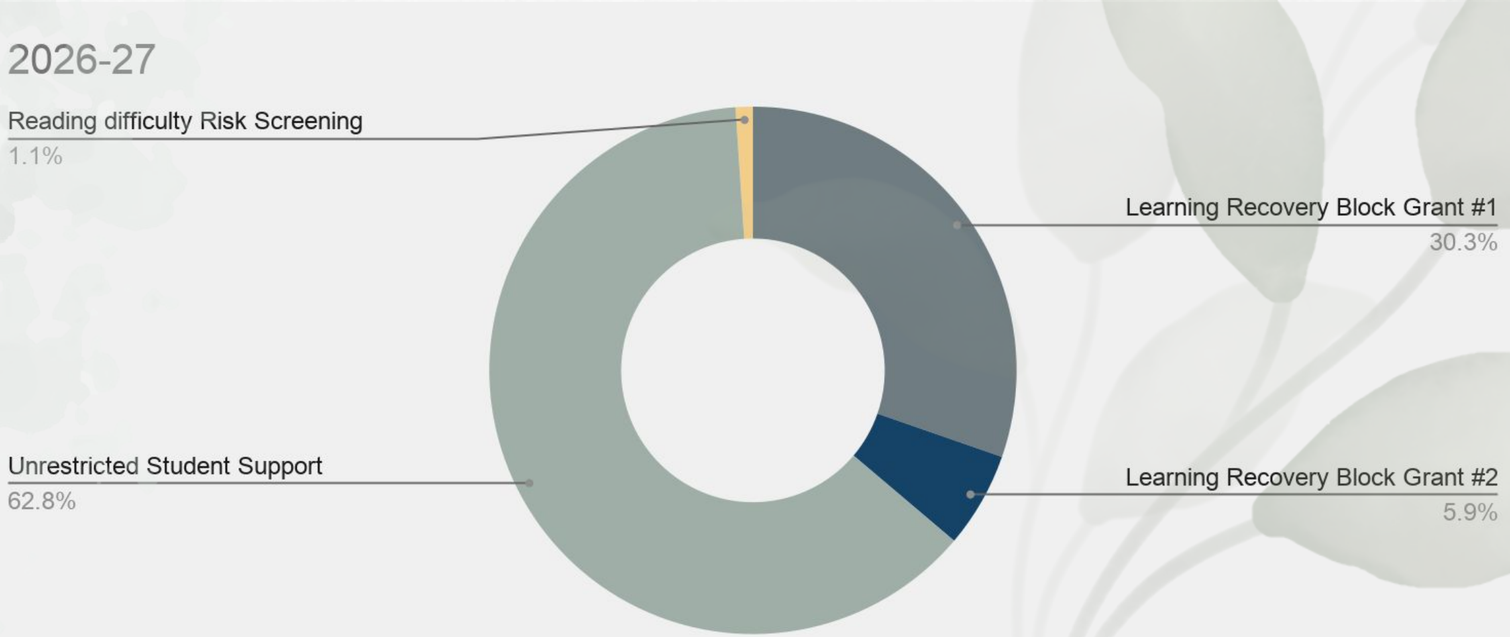


Sage Oak Charter Schools

One Time Funding

Grants

- Learning Recovery Block Grants
- Unrestricted Student Support
- Reading difficulty Risk Screening



Sage Oak Charter Schools

Net Revenue & Reserves

Net revenue provides a measure of financial performance in the current year. Each of Sage Oak's three charters is projected to have a positive net revenue. Reserves, the sum total of all prior years' net revenue, illustrate the relative strength over time, and the resources ready to deploy in an unexpected economic event. Reserve levels also fuel future year growth in terms of available cash.

Sage Oak

Net Revenue	**$1,368,127**
Ending Fund Balance	**$20,565,477**

Sage Oak Keppel

Net Revenue	$181,303
Ending Fund Balance	$3,458,259

Sage Oak South

Net Revenue	$232,784
Ending Fund Balance	$5,085,170

Sage Oak Charter Schools

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Sage Oak Charter Schools

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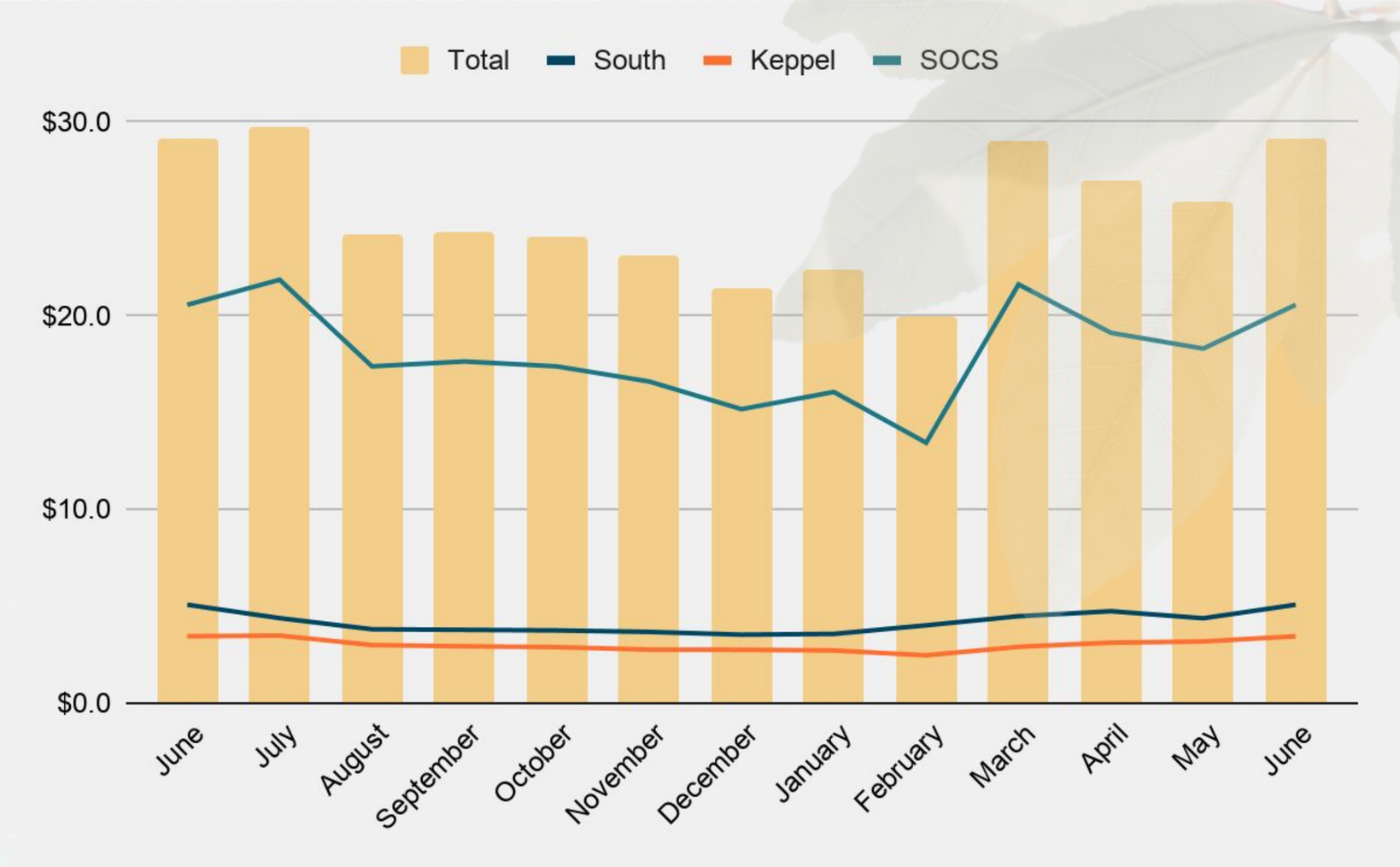
Sage Oak Charter Schools

Cash Flow

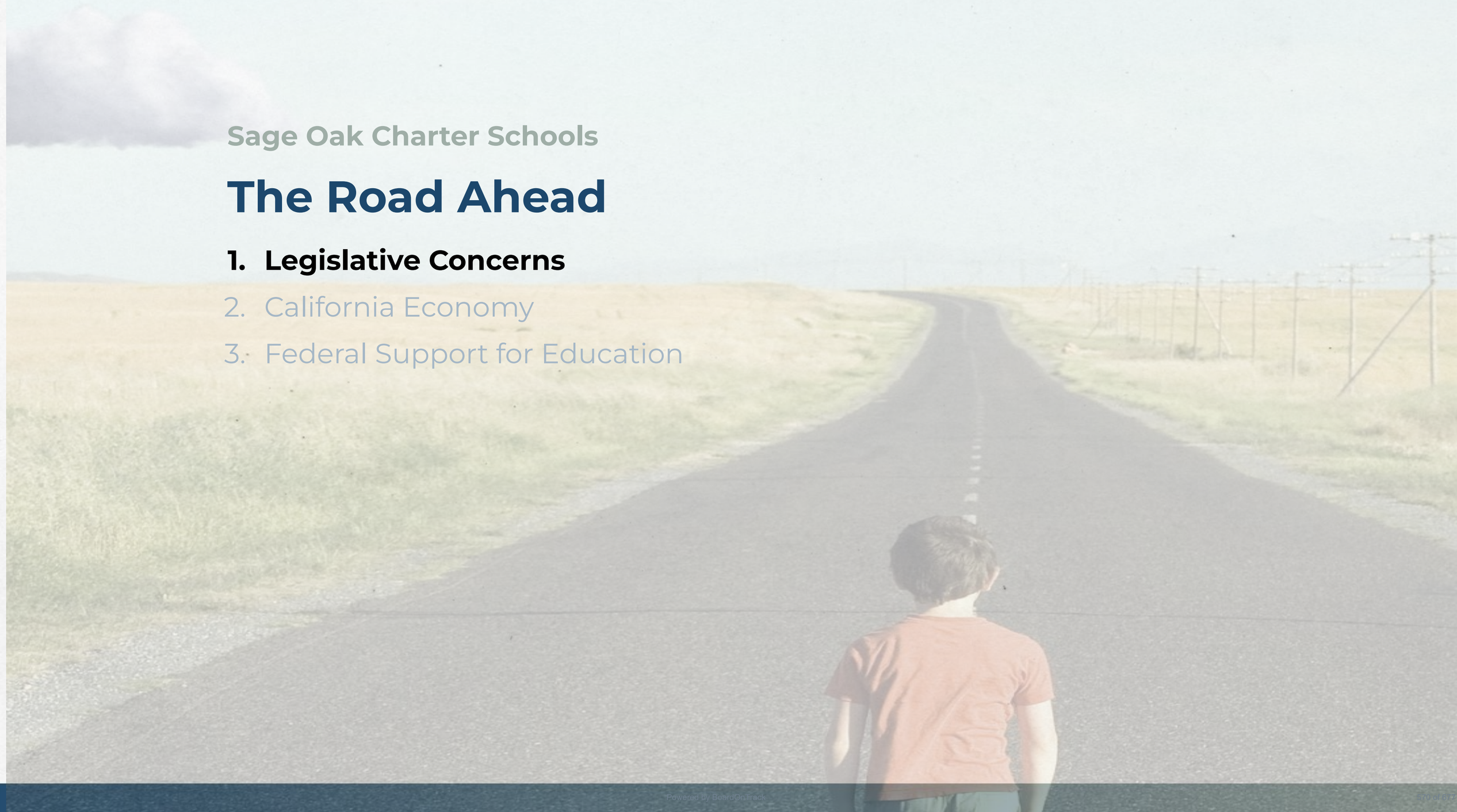
Values in millions



Lowest Cash Balance:

February 2027

$19.9 M



Sage Oak Charter Schools

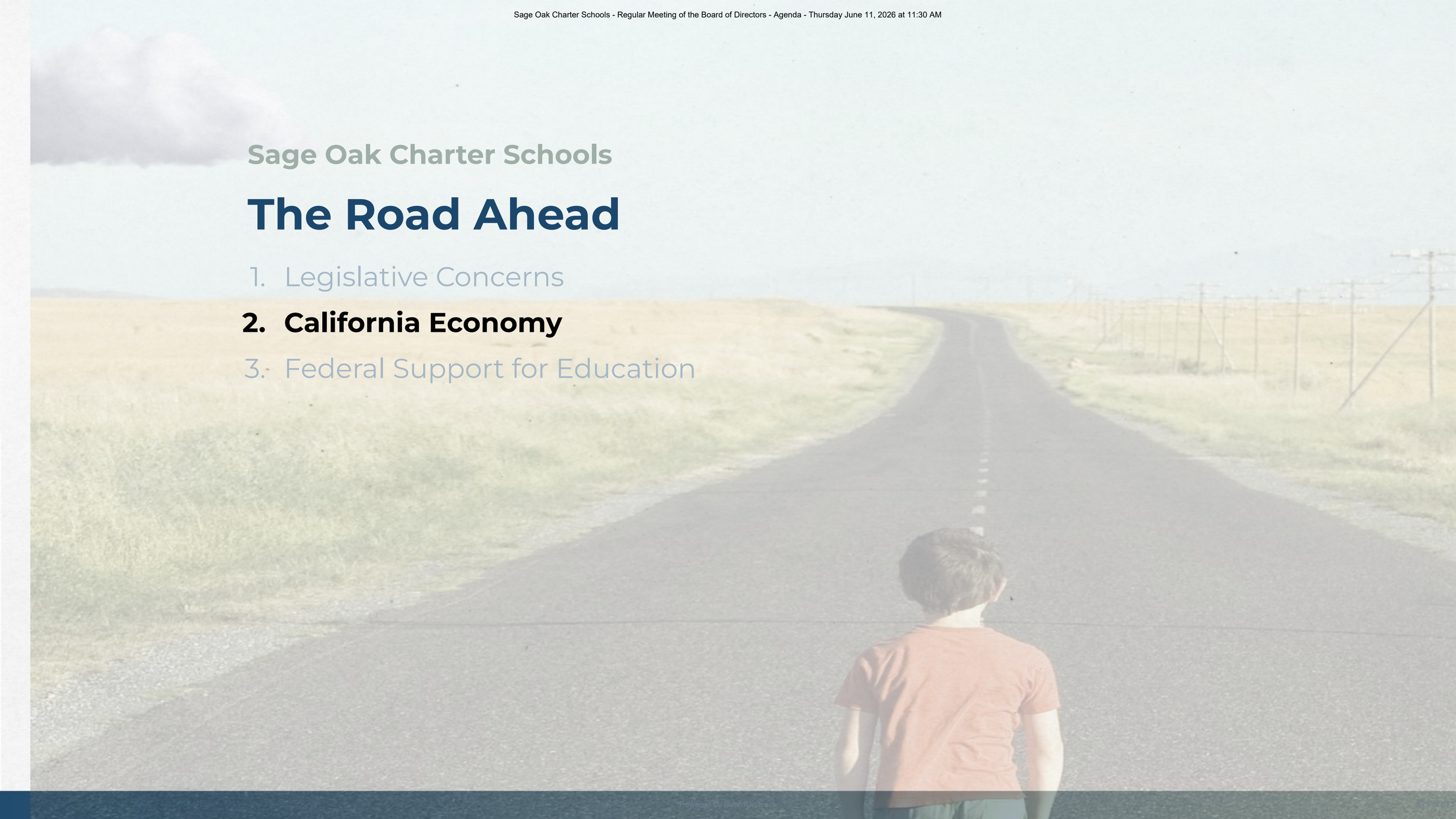
The Road Ahead

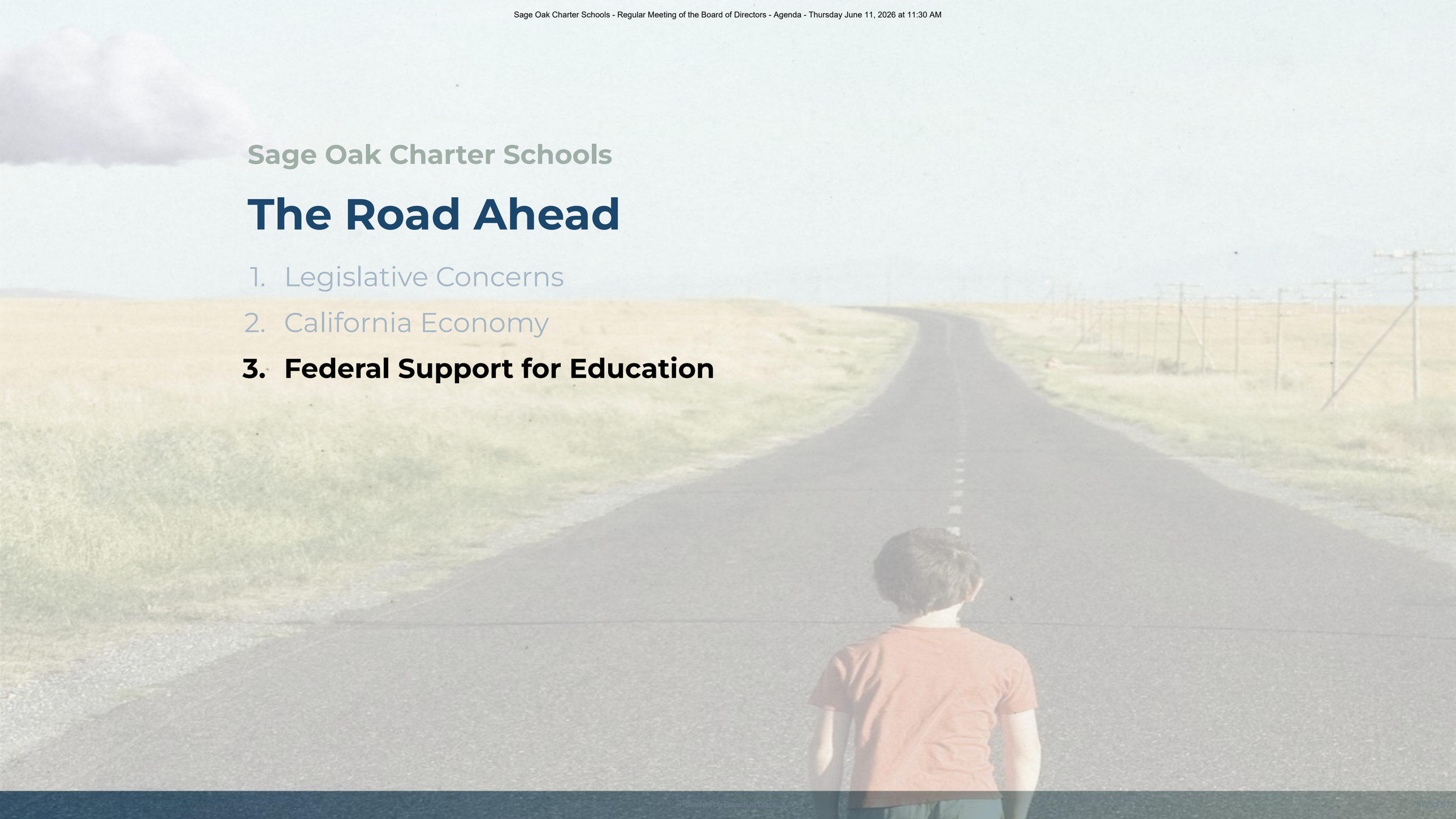
1. **Legislative Concerns**
2. California Economy
3. Federal Support for Education

Sage Oak Charter Schools

The Road Ahead

1. Legislative Concerns
2. **California Economy**
3. Federal Support for Education





Sage Oak Charter Schools

The Road Ahead

1. Legislative Concerns
2. California Economy
3. **Federal Support for Education**

SAGE OAK
CHARTER SCHOOLS

Thank You!

SAGE OAK
CHARTER SCHOOLS

Sage Oak Charter Schools
2026-27 July Budget

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SAGE OAK CHARTER SCHOOLS

Introduction & General Comments

California State Law mandates that all charter schools must adopt a July Budget annually by July 1. This report compares the 2025-26 Estimated Actuals (EA) with the 2026-27 July Budget. The July Budget for 2026-27 presents Sage Oak's revenue and expenditure forecasts for the current fiscal year and the two subsequent fiscal years.

Included in this report for each of the three Sage Oak Charter Schools are:

- A summary analysis of operations, cash, and changes to revenues and expenditures.
- A detailed statement of activities, also known as the Profit and Loss (P&L), offers account-level details for the current year EA through June 30, 2026, along with the 2026-27 July Budget.
- A Multi-Year Projection (MYP) that offers a view of Sage Oak's anticipated growth trajectory.
- Cash flow reports for the current year and the following fiscal year provide an overview of Sage Oak Charter Schools' expected cash position.

Sage Oak Charter Schools is projected to generate an operating surplus for the 2026-27 fiscal year, with a combined annual net revenue of $1.8M (1.9% of expenditures). Sage Oak Charter Schools' exceptional financial strength enables the schools to invest heavily in students and staff. The projected ending fund balance of $29.1M represents 30.6% of annual expenditures, equivalent to 112 operating days of potential cash. Each school is well-prepared to navigate unforeseen economic circumstances and accommodate the growth of additional students.

In the 2026-27 fiscal year cash flow analysis, it was observed that the consolidated cash is projected to reach its lowest point at the end of February 2027, with $19.9M potential cash on hand. This cash reserve is deemed sufficient to sustain operations and safeguard against potential economic shocks.

Assumptions related to the production of Sage Oak's Multi-Year Projection (MYP) are listed on the Funding Assumptions page.

The presented information will be compiled into the required report format for each authorizing district, along with any other necessary supplemental financial data required by each authorizer. These reports will be certified by the Chief Financial Officer (CFO) and promptly delivered to each authorizer following Board approval.

Per Education Code 42130(a)(1), the certifications are defined as follows:

- Positive: Will meet financial obligations for the current and two subsequent fiscal years.
- Qualified: May not meet financial obligations for the current and two subsequent fiscal years.
- Negative: Will not meet financial obligations for the current or the subsequent fiscal year.

Sage Oak Charter Schools will submit a Positive Certification for the 2026-27 July Budget.

SAGE OAK CHARTER SCHOOLS

Funding Assumptions

Enrollment & Average Daily Attendance (ADA)

- Grade band information is provided on the Enrollment & ADA Assumptions page.
- The 2026-27 July Budget and the Multi-Year Projections (MYP) for 2027-28 and 2028-29 utilized a 99.2% ADA-to-enrollment ratio across all grade bands.
- The 2026-27 July Budget projects an enrollment of 6,100, with an ADA of 6,051. The projected growth rates are 8.2% for 2027-28 and 7.6% for 2028-29.
- The three-year rolling average for the Unduplicated Pupil Percentage (UPP) is 51.3% across all Sage Oak Charter Schools.

LCFF 2026-27 Adjusted Base Grants per ADA

TK-3	4-6	7-8	9-12
$10,698	$10,860	$11,181	$12,958

- The TK add-on is $5,704.
- These assumptions serve as data inputs for calculating revenue in the Local Control Funding Formula (LCFF) calculator.

Multi-year Funding

- The projected budget for the 2026-27 fiscal year uses the cost-of-living adjustment (COLA) estimate that aligns with the SSC Fiscal Report published April 30, 2026. The following two fiscal years use the COLA estimates that align with the SSC Dartboard published on January 20, 2026.
- COLA of 2.87% is applied to select categorical program funding, and COLA of 4.31% is applied to the LCFF Base Grants, excluding the TK add-on.

	2026-27	2027-28	2028-29
COLA	2.87% / 4.31%	3.06%	3.34%

Federal Funding

- Continued participation in Title I Part A, Title II Part A, and Title IV Part A programs under the Every Student Succeeds Act (ESSA).
- The Federal Individuals with Disabilities Education Act (IDEA) funding is projected to be $156 per ADA. For the MYP for 2027-28 and 2028-29, IDEA funding is aligned with the current year funding rate.

State Funding

- LCFF revenue is calculated using the latest version of the Fiscal Crisis & Management Assistance Team's (FCMAT) LCFF calculator, with COLA estimates aligned with the multi-year funding table shown above.
- The preliminary funding for Proposition 28 in 2026-27 includes an entitlement of $789K, with $655K allocated in the 2026-27 July Budget. For the MYP for 2027-28 and 2028-29, funding is aligned with the current year funding rate. LEAs must allocate a minimum of 80.0% of these funds towards staffing for arts education instruction, while the remaining portion is designated for training supplies, curriculum, professional learning, materials, and arts educational partnership programs.
- Included $1.5M in Student Support and Professional Development Block Grant Funding the 2026-27 July Budget.
- The $2.5M Learning Recovery Emergency Block Grant (LREBG) will continue to be utilized in the 2026-27 fiscal year, with $876K allocated and the remaining amount to be utilized before the grant's expiration date of June 30, 2028.
- Lottery funding, unrestricted and restricted, is budgeted based on $190 and $82 per ADA, respectively.
- Special Education AB602 revenue is budgeted at $1,340 per current year ADA. For the MYP, the amount was augmented based on the COLA for each year.
- Mandated Block Grant is funded at $21 and $60 per ADA for K-8 and 9-12, respectively. For the MYP, the amount was augmented based on the COLA for each year.

Local Funding

- Approximately $813K in interest revenue is projected from funds held at the San Diego County Office of Education Treasury and Chase Bank.

One-Time Funds

Usage of One-Time Grants:
Sage Oak strategically utilizes one-time grants to maximize student benefits while ensuring long-term fiscal responsibility. This involves balancing the timing and restrictions associated with each grant.

Financial Impact of Grants:
One-time grants represent an average of 2.5% of revenue for the current fiscal year. Despite being substantial in absolute terms, it is relatively small compared to the overall budget, illustrating their limited impact on the Schools' budget.

Long-Term Planning:
Sage Oak conducts financial modeling to ensure effective operations after the one-time grants are spent. The sustainability of expenditures tied to the one-time grants is assessed based on the Schools' growth. As the School grows, the reliance on one-time grants decreases, and expenditures related to these grants can be maintained through the Schools' increasing revenue.

Overall Strategy:
Management decides how the Schools' growth can cover ongoing expenses without future dependence on one-time grants. As the School expands, the proportion of revenue from one-time grants decreases relative to total revenue, and the expenditures initially supported by these grants can continue seamlessly, if opted, with the Schools' projected growth in revenue.

Explanations of One-Time Grants:

Grant	Expenditure Details:
Learning Recovery Emergency Block Grant	The Learning Recovery Block Grant will be utilized for salaries, benefits, and programs that are Multi-Tiered System of Support (MTSS).
Literacy Screenings Professional Development	The Literacy Screening and Training Grant will be used to assess kindergarten through second-grade students for potential reading difficulties.
Student Support and Professional Development	The Student Support and Professional Development Grant will be used to support instructional-related expenses and other operations.
Ethnic Studies	The Ethnic Studies Grant will be used to support ethnic studies curriculum for high school students.

(Continued on next page)

One-Time Funds

Revenues:

	2025-26 EA	2026-27 July	2027-28	2028-29
Total LCFF Revenues	68,599,458	80,781,238	90,670,777	100,767,840
Total Federal Revenues	1,691,554	1,744,613	1,704,644	1,704,644
Total Other State Revenues	10,990,174	13,716,727	13,854,673	14,356,564
Total Local Revenues	872,734	813,115	813,114	813,114
Total Revenues	**82,153,920**	**97,055,693**	**107,043,208**	**117,642,162**

One-time Grants Supplemental Details:

Grant	Expiration	Revenue Type	Available	2026-27	2027-28	2028-29	Remaining
Learning Recovery Emergency	06/30/2028	Other State	1,163,206	876,206	287,000		0
Literacy Screenings Professional Development	06/30/2026	Other State	25,635	25,635			0
Student Support and Professional Development	06/30/2029	Other State	3,356,759	1,519,759	1,131,300	705,700	0
Ethnic Studies	NA	Other State	16,413		16,413		0
Total			**4,562,013**	**2,421,600**	**1,434,713**	**705,700**	**0**

Grant Percentage of Total Revenues:	2025-26 EA	2026-27 July	2027-28	2028-29
Total Revenue Less One-Time Grants	78,624,408	94,634,093	105,624,908	116,936,462
Total Expenses with One-Time Expenses	80,858,442	95,273,477	104,258,892	114,058,126
Net Revenue	1,295,478	1,782,216	2,784,316	3,584,036
Net Revenue Without One-Time Grants	(2,234,034)	(639,384)	1,366,016	2,878,336
Net Revenue with One-Time Grants	**1,295,478**	**1,782,216**	**2,800,729**	**3,584,036**
One-Time Revenue as a % of Total Revenue	4.3%	2.5%	1.3%	0.6%
Projected Total Revenue Growth	13,029,204	14,901,773	9,987,515	10,598,954
Projected Total Revenue Growth Percentages (see notes for details)	18.8%	18.1%	10.3%	9.9%

Notes:

The projected budget for the 2026-27 fiscal year uses the cost-of-living adjustment (COLA) estimate that aligns with the SSC Fiscal Report published April 30, 2026. The following two fiscal years use the COLA estimates that align with the SSC Dartboard published on January 20, 2026.

COLA of 2.87% is applied to select categorical program funding, and COLA of 4.31% is applied to the Local Control Funding Formula (LCFF) Base Grants, excluding the TK add-on.

	2025-26 EA	2026-27 July	2027-28	2028-29
COLA	2.30%	2.87% / 4.31%	3.06%	3.34%
Enrollment	5,429	6,100	6,600	7,100
Enrollment Growth	11.0%	12.4%	8.2%	7.6%

SAGE OAK CHARTER SCHOOLS

Federal Funds

Usage of Federal Grants:

Sage Oak strategically utilizes federal grants to maximize student benefits while ensuring long-term fiscal responsibility. This involves balancing the timing and restrictions associated with each grant.

Financial Impact of Grants:

Federal grants represent an average of 1.8% of revenue for the current fiscal year. Despite being substantial in absolute terms, it is relatively small compared to the overall budget, illustrating their limited impact on the Schools' budget.

Long-Term Planning:

Sage Oak conducts financial modeling to ensure effective operations after federal grants are fully expended. The sustainability of expenditures tied to the federal grants is assessed based on the Schools' growth.

Overall Strategy:

Management decides how federal expenses can be covered by the Schools' growth without future dependence on federal grants. As the school expands, the proportion of revenue from federal grants remains steady and/or decreases relative to total revenue, and the expenditures initially supported by these grants can continue seamlessly, if opted, with the Schools' projected growth in revenue.

Explanations of Federal Grants:

Grant	Expenditure Details:
Individuals with Disabilities Education Act (Federal IDEA)	The Individuals with Disabilities Education Act Grant is utilized for salaries and benefits associated with special education (SpED).
Mental Health Average Daily Attendance (Federal MH)	The Mental Health Average Daily Attendance (Federal MH) Grant is used for salaries and benefits associated with special education (SpED).
Elementary and Secondary Education Act (Title I ESEA)	The Elementary and Secondary Education Act (Title I) Grant is used for salaries and benefits allowing Sage Oak to hire additional teachers or instructional aides to reduce classroom sizes.
Supporting Effective Instruction (Title II)	The Supporting Effective Instruction (Title II) Grant is used for professional development for teachers.
Student Support and Academic Enrichment (Title IV SSAE)	The Support and Academic Enrichment (Title IV) Grant is used to support activities and programs to help students receive a diverse and enriched academic experience.

(Continued on next page)

Federal Funds

Federal Grants:

Grant	Revenue Type	2025-26 EA	2026-27 July	2027-28	2028-29
Federal IDEA	Federal IDEA SpED	756,309	701,529	701,529	701,529
Federal MH	SpED Discretionary	52,756	52,338	52,338	52,338
Title I	Other Federal	704,550	784,225	744,254	744,254
Title II	Other Federal	125,636	154,215	154,215	154,215
Title IV	Other Federal	52,304	52,306	52,308	52,308
Total Grants Revenue		**1,691,555**	**1,744,613**	**1,704,644**	**1,704,644**

Federal Grants Analysis:	**2025-26 EA**	**2026-27 July**	**2027-28**	**2028-29**
Total Revenue Less Federal Funds	80,462,365	95,311,080	105,338,564	115,937,518
Total Expenses with Federal Expenses	80,858,442	95,273,477	104,258,892	114,058,126
Net Revenue	1,295,478	1,782,216	2,784,316	3,584,036
Net Revenue Without Federal Funds	(396,077)	37,603	1,079,672	1,879,392
Net Revenue with Federal Funds	**1,295,478**	**1,782,216**	**2,784,316**	**3,584,036**
Federal Revenue as a % of Total Revenue	2.1%	1.8%	1.6%	1.4%
Projected Total Revenue Growth	13,029,204	14,901,773	9,987,515	10,598,954
Projected Total Revenue Growth Percentage (see notes for details)	18.8%	18.1%	10.3%	9.9%

Notes:

The school remains financially sustainable even without federal grant funding. Core operations are primarily supported by state and local funding, including Average Daily Attendance (ADA) revenue, not reliant on federal sources. Strong fiscal management, healthy reserves, and conservative budgeting ensure the school can continue providing quality education. While some grant-funded programs may be scaled back, the loss of federal grants would not impact the school's overall financial health or ability to serve students.

2026-27 JULY vs EA - Detail

Sage Oak Charter School - Consolidated

	2026-27 July	2025-26 EA	$ Change	% Change	Notes
Revenue					
LCFF Revenue					
8011 - LCFF General Entitlement	77,592,034	65,530,381	12,061,653	18.4 %	
8012 - EPA Entitlement	1,210,268	1,077,095	133,173	12.4 %	
8019 - Prior Year Unrestricted Revenue	0	(11,514)	11,514	(100.0) %	
8096 - In-Lieu-Of Property Taxes	1,978,936	1,979,433	(497)	(0.0) %	
8097 - In-Lieu Property Taxes Prior Year	0	24,063	(24,063)	(100.0) %	
Total LCFF Revenues	80,781,238	68,599,458	12,181,780	17.8 %	The change is due to enrollment and ADA.
Federal Revenue					
8181 - Federal IDEA SpEd Revenue	701,529	756,308	(54,779)	(7.2) %	The change is due to the updated allocations from the SELPA.
8182 - SpEd - Discretionary Grants	52,338	52,756	(418)	(0.8) %	
8290 - Other Federal Revenue	990,746	882,490	108,256	12.3 %	The change is due to the updated allocations from the California Department of Education (CDE).
Total Federal Revenue	1,744,613	1,691,554	53,059	3.1 %	
Other State Revenue					
8311 - AB602 State SpEd Revenue	8,108,792	4,941,328	3,167,464	64.1 %	The change is due to enrollment and ADA.
8550 - Mandated Cost Reimbursements	148,970	129,892	19,078	14.7 %	
8560 - Lottery- Unrestricted	1,200,874	1,029,007	171,867	16.7 %	
8561 - Lottery- Prop 20 - Restricted	518,273	429,021	89,252	20.8 %	
8590 - Other State Revenue	3,739,818	4,460,926	(721,108)	(16.2) %	The change is due to recognizing the one-time AMIM grant.
Total Other State Revenue	13,716,727	10,990,174	2,726,553	24.8 %	The change is due to enrollment and ADA.
Local Revenue					
8660 - Interest Income	813,115	872,734	(59,619)	(6.8) %	The change is due to projected federal interest rates.
Total Local Revenue	813,115	872,734	(59,619)	(6.8) %	
Total Revenue	97,055,693	82,153,920	14,901,773	18.1 %	
Expenditures					
1000-1999 Certificated Salaries					
1100 Certificated Teachers Salaries	25,219,183	21,394,353	3,824,830	17.9 %	
1200 Certificated Pupil Support	9,515,614	6,798,430	2,717,184	40.0 %	
1300 Certificated Supervisors and Administrators Salaries	4,443,663	4,051,097	392,566	9.7 %	
Total 1000-1999 Certificated Salaries	39,178,460	32,243,880	6,934,580	21.5 %	The change is due to staffing needs aligned with student enrollment.
2000-2999 Classified Salaries					
2100 Classified Instructional Salaries	1,669,764	1,216,073	453,691	37.3 %	
2300 Classified Supervisors and Admin Salaries	4,322,778	3,778,661	544,117	14.4 %	
2400 Clerical, Technical and Office Salaries	4,683,564	3,315,431	1,368,133	41.3 %	
Total 2000-2999 Classified Salaries	10,676,106	8,310,165	2,365,941	28.5 %	The change is due to staffing needs aligned with student enrollment.
3000-3999 Employee Benefits					
3101-3102 STRS					
3101 - STRS Certificated	7,463,607	6,151,849	1,311,758	21.3 %	
Total 3101-3102 STRS	7,463,607	6,151,849	1,311,758	21.3 %	The change is due to staffing needs aligned with student enrollment.
3301-3302 OASDI/Medicare/Alternative					
3313 - Medicare - Certificated	586,037	480,659	105,378	21.9 %	
3314 - Medicare - Classified	158,556	122,061	36,495	29.9 %	
3355 - OASDI - Certificated	0	7,105	(7,105)	(100.0) %	The change is due to the projected number of staff contributing to Social Security Taxes.
3356 - OASDI - Classified	677,968	519,704	158,264	30.5 %	
Total 3301-3302 OASDI/Medicare/Alternative	1,422,561	1,129,529	293,032	25.9 %	The change is due to staffing needs aligned with student enrollment.
3401-3402 Health and Welfare Benefits					
3401 - Health Care Certificated	4,424,095	3,707,872	716,223	19.3 %	
3402 - Health Care Classified	1,678,671	1,325,803	352,868	26.6 %	
Total 3401-3402 Health and Welfare Benefits	6,102,766	5,033,675	1,069,091	21.2 %	The change is due to staffing needs aligned with student enrollment.

2026-27 JULY vs EA - Detail

Sage Oak Charter School - Consolidated

	2026-27 July	2025-26 EA	$ Change	% Change	Notes
3501-3502 Unemployment Insurance					
3501 - Unemployment Insurance Certificated	92,339	92,181	158	0.2 %	
3502 - Unemployment Insurance Classified	42,838	47,122	(4,284)	(9.1) %	
Total 3501-3502 Unemployment Insurance	135,177	139,303	(4,126)	(3.0) %	The change is due to the unemployment rate and hiring conditions.
3601-3602 Workers' Compensation					
3601 - Workers' Comp Certificated	191,977	118,670	73,307	61.8 %	
3602 - Workers' Comp Classified	51,942	30,131	21,811	72.4 %	
Total 3601-3602 Workers' Compensation	243,919	148,801	95,118	63.9 %	The change is due to staffing needs aligned with student enrollment.
3901-3902 Other Employee Benefits					
3901 - Other Benefits Cert	1,484,353	1,158,502	325,851	28.1 %	
3902 - Other Benefits Class	369,490	226,660	142,830	63.0 %	
3922 - 457b Employer match-Classified	1,064,410	516,881	547,529	105.9 %	
Total 3901-3902 Other Employee Benefits	2,918,253	1,902,043	1,016,210	53.4 %	The change is due to staffing needs aligned with student enrollment.
Total 3000-3999 Employee Benefits	18,286,283	14,505,200	3,781,083	26.1 %	
4100-4799 Books, Materials, & Supplies					
4200 Books and Other Reference Materials					
4200 - Other Reference Materials	1,228,399	578,409	649,990	112.4 %	
Total 4200 Books and Other Reference Materials	1,228,399	578,409	649,990	112.4 %	The change is due to coding alignment for Sage Crates curriculum.
4300 Materials and Supplies					
4310 - Materials & Supplies	658,750	613,640	45,110	7.4 %	The change is due to materials and supplies for students based on enrollment.
4320 - Office Supplies	316,600	170,387	146,213	85.8 %	The change is due to upgrading staff MiFi devices.
4330 - Events Supplies	35,800	18,851	16,949	89.9 %	The change is due to planned activities for students.
4350 - Other Supplies - Materials & Supplies	17,500	14,626	2,874	19.6 %	The change is due to graduation supplies.
4381 - Instructional Funds - Materials	5,860,485	5,287,073	573,412	10.8 %	The change is due to enrollment and the Instructional Funds (IF) rate.
Total 4300 Materials and Supplies	6,889,135	6,104,577	784,558	12.9 %	
4400 Noncapitalized Equipment					
4400 - Non-Capitalized Equipment	1,205,700	2,542,156	(1,336,456)	(52.6) %	The change is due to planned student Chromebook replacements.
Total 4400 Noncapitalized Equipment	1,205,700	2,542,156	(1,336,456)	(52.6) %	
Total 4100-4799 Books, Materials, & Supplies	9,323,234	9,225,142	98,092	1.1 %	
5100-5999 Services & Other Operating Expenditures					
5100 Subagreements for Services					
5100 - SpEd Consultants and Vendors Subagreements for Service	196,000	592,279	(396,279)	(66.9) %	
Total 5100 Subagreements for Services	196,000	592,279	(396,279)	(66.9) %	The change is due to employee recruitment in place of external consultants.
5200 Travel and Conferences					
5210 - Mileage Reimbursements	24,600	22,969	1,631	7.1 %	
5220 - Travel & Conferences	428,600	368,082	60,518	16.4 %	The change is due to staff attendance at professional development conferences.
Total 5200 Travel and Conferences	453,200	391,051	62,149	15.9 %	
5300 Dues and Memberships					
5300 - Dues & Memberships	233,065	171,388	61,677	36.0 %	
Total 5300 Dues and Memberships	233,065	171,388	61,677	36.0 %	The change is due to membership fees based on student enrollment.
5400 Insurance					
5400 - Insurance	250,000	237,098	12,902	5.4 %	
Total 5400 Insurance	250,000	237,098	12,902	5.4 %	The change is due to estimated contract costs for the year.
5500 Operations and Housekeeping Services					
5510 - Utilities (General)	162,100	170,601	(8,501)	(5.0) %	
Total 5500 Operations and Housekeeping Services	162,100	170,601	(8,501)	(5.0) %	The change is due to Hotspot services.

2026-27 JULY vs EA - Detail

Sage Oak Charter School - Consolidated

	2026-27 July	2025-26 EA	$ Change	% Change	Notes
5600 Rents, Leases, Repairs, and Noncap. Improvements					
5610 - Facility Rents & Leases	1,045,574	1,062,048	(16,474)	(1.6) %	The change is due to facility costs based on current lease estimates.
5612 - Testing Site	120,000	92,479	27,521	29.8 %	The change is due to Special Education assessment site rentals.
5620 - Equipment Leases	5,800	5,641	159	2.8 %	
Total 5600 Rents, Leases, Repairs, and Noncap. Improvements	1,171,374	1,160,168	11,206	1.0 %	
5800 Professional/Consulting Services and Operating Expend.					
5800 - Professional Services - Non-instructional	305,701	282,225	23,476	8.3 %	The change is due to marketing consultant services supporting data systems.
5810 - Legal	289,600	282,000	7,600	2.7 %	The change is due to the engagement of legal counsel.
5820 - Audit & CPA	65,000	71,954	(6,954)	(9.7) %	The change is due to the updated contract for audit services.
5835 - Field Trips	141,500	127,392	14,108	11.1 %	The change is due to student field trips.
5840 - Advertising & Recruitment	84,300	120,089	(35,789)	(29.8) %	The change is due to advertising expenses supporting marketing and recruitment.
5850 - Oversight Fees	2,040,128	1,740,617	299,511	17.2 %	The change is due to enrollment.
5860 - Service Fees	470,017	448,050	21,967	4.9 %	The change is due to service fees for the Human Resources (HR) management system.
5863 - Professional Development	1,725,019	748,752	976,267	130.4 %	The change is due to professional development opportunities for teachers and staff.
5870 - Livescan Fingerprinting	750	1,134	(384)	(33.9) %	The change is due to the number of Livescan reimbursements.
5877 - Lending Library	12,701	342,419	(329,718)	(96.3) %	The change is due to coding alignment for Sage Crates curriculum.
5878 - Student Assessment	39,499	36,097	3,402	9.4 %	The change is due to the updated quote for the i-Ready assessment.
5880 - Instructional Vendors & Consultants	68,100	250,757	(182,657)	(72.8) %	The change is due to continued student conferences aligned with participation requirements.
5881 - Instructional Funds - Services	7,162,814	6,461,977	700,837	10.8 %	The change is due to enrollment and the IF rate.
5883 - Outside Consultant and Services	42,900	15,393	27,507	178.7 %	The change is due to contracting an outside consultant to update job descriptions.
5887 - Student Service Technology	1,215,601	1,045,939	169,662	16.2 %	The change is due to additional technology programs for students and staff.
Total 5800 Professional/Consulting Services and Operating Expend.	13,663,630	11,974,795	1,688,835	14.1 %	
5900 Communications					
5930 - Postage	146,500	142,205	4,295	3.0 %	The change is due to warehouse shipping expenses.
5940 - Technology Services	1,316,525	1,648,070	(331,545)	(20.1) %	The change is due to coding alignment for IT projects.
Total 5900 Communications	1,463,025	1,790,275	(327,250)	(18.3) %	
Total 5100-5999 Services & Other Operating Expenditures	17,592,394	16,487,655	1,104,739	6.7 %	
6100-6999 Capital Outlay					
Capital Expenditures					
6901 - Depreciation Expense-Leasehold Improvements	217,000	86,400	130,600	151.2 %	
Total Capital Expenditures	217,000	86,400	130,600	151.2 %	The change is due to depreciation on capitalized equipment and leasehold improvements.
Total 6100-6999 Capital Outlay	217,000	86,400	130,600	151.2 %	
Total Expenditures	95,273,477	80,858,442	14,415,035	17.8 %	
Operating Income/(Loss)	1,782,216	1,295,478	486,738	37.6 %	
Net Assets					
9791 - Beginning Fund Balance	27,326,692	26,031,214	1,295,478	5.0 %	
Total Net Assets	27,326,692	26,031,214	1,295,478	5.0 %	
Change In Net Assets	1,782,216	1,295,478	486,738	37.6 %	
Total Net Assets	29,108,908	27,326,692	1,782,216	6.5 %	

Net revenue as a % of expense	1.9 %	1.6 %
Fund balance as a % of expense	30.6 %	33.8 %
Days of Potential Cash	112	123

SAGE OAK CHARTER SCHOOLS

2026-27 JULY VS EA
Cash Flow Statement 2026-27
Sage Oak Charter School - Consolidated

	Year Ending 06/30/2027	Month Ending 07/31/2026	Month Ending 08/31/2026	Month Ending 09/30/2026	Month Ending 10/31/2026	Month Ending 11/30/2026	Month Ending 12/31/2026	Month Ending 01/31/2027	Month Ending 02/28/2027	Month Ending 03/31/2027	Month Ending 04/30/2027	Month Ending 05/31/2027	Month Ending 06/30/2027		
	2026-27 July	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Total	Variance
Cash Balance															
Beginning Cash	26,605,457	26,605,457	29,745,093	24,208,769	24,369,233	24,042,981	23,060,494	21,480,495	22,366,971	19,941,891	29,020,138	26,996,936	25,879,407		
Net Cash for Period															
REVENUES	97,055,693	3,925,890	3,975,011	7,900,306	6,930,329	6,988,521	7,737,719	7,920,293	9,531,929	11,161,382	9,799,910	9,922,695	11,261,708	97,055,693	0
EXPENDITURES	95,273,477	5,830,374	7,699,616	7,875,859	7,545,738	7,758,038	8,230,845	7,554,923	8,242,346	8,002,328	8,063,750	8,191,783	10,277,877	95,273,477	0
Net Cash for Period	1,782,216	(1,904,484)	(3,724,605)	24,447	(615,409)	(769,517)	(493,126)	365,370	1,289,583	3,159,054	1,736,160	1,730,912	983,831	1,782,216	0
Accounts Receivable	7,118,708	(6,632,415)	(361,184)	285,131	(7,343)	(5,837)	(286,425)	272,900	5,687,773	(4,955,785)	4,437,170	1,571,911	7,112,812	7,118,708	0
Other Assets	1,772,934	27,825	6,823	1,046	2,199	7,534	16,349	42,734	151,321	47,239	5,843	41,445	1,422,576	1,772,934	0
Accounts Payable	4,228,141	(1,790,725)	(1,806,570)	719,508	459,938	(202,072)	(1,059,838)	1,007,193	765,635	974,007	703,955	(2,376,341)	6,833,451	4,228,141	0
Deferred Revenue/Prepaid Expenses	5,384,736	230,255	(359,510)	(297,314)	(175,925)	(9,201)	(297,111)	(170,453)	1,358,796	36,640	(20,304)	1,141,256	3,947,607	5,384,736	0
Cash at End of Period	29,108,908	29,745,093	24,208,769	24,369,233	24,042,981	23,060,494	21,480,495	22,366,971	19,941,891	29,020,138	26,996,936	25,879,407	29,108,908		
Days of Potential Cash	112	114	93	93	92	88	82	86	76	111	103	99	112		

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Comprehensive Department Budget

Department	Dpt Code	Code	Bucket	Items	2026-27 July Budget
Bus Serv	907	4320	Office Supplies	Office Materials/Supplies B.S. Office Supplies $17,350K KW & Tim Admin - $150	13,500
Bus Serv	907	4320	Office Supplies	Warehouse Supplies/Materials	55,000
Bus Serv	907	5210	Mileage Reimbursements	Mileage Reimbursements for All Staff	6,000
Bus Serv	907	5210	Mileage Reimbursements	Board Mileage	3,100
Bus Serv	907	5300	Dues and memberships	CASBO Organizational Membership	3,400
Bus Serv	907	5300	Dues and Memberships	School Services of CA, Membership	4,380
Bus Serv	907	5300	Dues and Memberships	APlus+ Membership +$5,000	29,750
Bus Serv	907	5300	Dues and Memberships	CSDC Membership	30,000
Bus Serv	907	5300	Dues and Memberships	CCSA Membership	131,520
Bus Serv	907	5300	Dues and Memberships	SSDA Membership	2,800
Bus Serv	907	5300	Dues and Memberships	ACSA Membership	9,800
Bus Serv	907	5300	Dues and Memberships	AASA Membership (L.K.)	1,000
Bus Serv	907	5300	Dues and Memberships	Digital Learning Membership	100
Bus Serv	907	5300	Dues and Memberships	National Honor Society Fees	2,800
Bus Serv	907	5300	Dues and Memberships	CADA/CASDL ASB Program	300
Bus Serv	907	5300	Dues and Memberships	Amazon Prime Business Membership	3,900
Bus Serv	907	5300	Dues and Memberships	General Memberships and Renewals Energage Employer Branding Membership	200
Bus Serv	907	5300	Dues and Memberships	HR Annual Memberships: SHRM & PIHRA CCAC	1,350
Bus Serv	907	5300	Dues and Memberships	Costco Membership	65
Bus Serv	907	5300	Dues and Memberships	Energage Employer Branding Membership	9,000
Bus Serv	907	5400	Insurance	Liability and Property Insurance	250,000
Bus Serv	907	5510	Operating Expenditures, Utilities	Utilities: SCE, Frontier, ADT, Janitorial	81,000
Bus Serv	907	5610	Facility rents and leases	Office Lease (All Three Spaces) ALL COSTS	993,874
Bus Serv	907	5800	Professional Services	Board Stipends	55,500
Bus Serv	907	5860	Professional Service Fees	Fleet Maintenance	2,000
Bus Serv	907	5860	Professional Service Fees	Environmental Fee CDTFA	3,100
Bus Serv	907	5860	Professional Service Fees	Business Property Tax	1,900
Bus Serv	907	5860	Professional Service Fees	Vehicle Registrations	3,316
Bus Serv	907	5877	Lending Library	Vehicle Rentals	7,700
Bus Serv	907	5877	Lending Library	Fuel Cards	5,000
Bus Serv	907	5930	Postage	UPS	143,800
Bus Serv	907	6901	Depreciation	Depreciation Expense-Leasehold Improvements	144,000
Bus Serv	907	6901	Depreciation	Depreciation Expense - Vehicles	73,000
Community Outreach	915	4310	Materials & Supplies	Marketing Supplies	8,350
Community Outreach	915	4320	Office Supplies	Office Supplies (Business Cards, Printed Materials, etc.)	1,000
Community Outreach	915	5210	Travel & Mileage	Authorizer Meetings/Travel Expenses	3,500
Community Outreach	915	5800	Professional Services	Marketing Consultants (Design Pickle)	20,000
Community Outreach	915	5800	Professional Services	Podcast/Production Outside Services	31,000
Community Outreach	915	5800	Professional Services	Crisis Communication	5,000

Comprehensive Department Budget

Department	Dpt Code	Code	Bucket	Items	2026-27 July Budget
Community Outreach	915	5840	Advertising	PPC Pay-Per-Click Enrollment Marketing Campaign	15,500
Community Outreach	915	5840	Advertising	Videos for Marketing the School	35,000
Community Outreach	915	5887	Technology Services	Subscriptions - Mailchimp, Descript CapCut, & Buzzsprout	2,600
Fiscal Serv	916	4320	Office Supplies	Misc. Office Materials and Supplies	400
Fiscal Serv	916	4320	Office Supplies	Printing Costs for Interims and Year-End Reports to Be Given to Authorizers	1,500
Fiscal Serv	916	4320	Office Supplies	Interims and Year-End Huddle Meetings and Recap Roundtable	800
Fiscal Serv	916	5820	Audit & CPA	CLA Audit and Tax Fees	65,000
Fiscal Serv	916	5850	Authorizor oversight fee	Sage Oak (3%)	1,830,110
Fiscal Serv	916	5850	Authorizor oversight fee	Sage Oak - Keppel (1%)	80,610
Fiscal Serv	916	5850	Authorizor oversight fee	Sage Oak - South (1%)	101,800
HR	901	4320	Office Supplies	Reasonable Accommodation	1,300
HR	901	4320	Office Supplies	Office Events / Coffee Talks	2,100
HR	901	4320	Office Supplies	Department Staff Materials	900
HR	901	4320	Office Supplies	Sage Oak Shares Initiative	2,500
HR	901	4320	Office Supplies	Work Anniversary Initiative (Employee Recognition)	10,000
HR	901	4320	Office Supplies	Operational Costs: First Aid Materials and Kits Fire Extinguisher Inspection Labor Law Posters FRISK Manuals	4,500
HR	901	4320	Office Supplies	In-Person Interview Materials and Supplies	2,100
HR	901	4320	Office Supplies	Health Enhancement Systems - Reimbursed through Cigna	10,000
HR	901	4320	Office Supplies	Office Materials & Supplies for HR	4,000
HR	901	5620	Rentals, Leases, and Repairs	Konica Minolta 5 Year Operating Lease	5,800
HR	901	5840	Advertising & Recruitment	Recruitment (Sparkhire, Billboard, EDJOIN, Commercial Advertisement, and New Hire Welcome Kits)	33,800
HR	901	5860	Service Fees	San Bernardino, Los Angeles, and San Diego COE STRS Consultation/Review	35,000
HR	901	5860	Service Fees	UKG	205,400
HR	901	5863	Professional Development	Emergency/Permit Credential Fees	500
HR	901	5863	Professional Development	PD Reimbursements (Staff Out-of-Pocket Professional Development)	4,300
HR	901	5863	Professional Development	Teacher Induction - EOY	25,700
HR	901	5863	Professional Development	PD Reimbursements	150,000
HR	901	5870	TB reimbursement	TB Reimbursements for Continuing Staff	750
HR	901	5883	Outside Consultants	Consulting Agency for JD Update	35,900
HR	901	5930	Postage	COVID Supplies & Postage	200
HR	901	5940	Operating Expenditures, Technology	Annual Software Subscriptions - Napkin	200
HR	901	5940	Operating Expenditures, Technology	eFax	300
HR	901	5940	Operating Expenditures, Technology	Vendor for Virtual Employee ID Cards	6,000

Comprehensive Department Budget

Department	Dpt Code	Code	Bucket	Items	2026-27 July Budget
HR	901	5940	Operating Expenditures, Technology	IGOE FSA Fees	25,920
IT	914	4320	Office Supplies	Computer Repair Parts and Misc Tech Supplies	25,000
IT	914	4320	Non capitalized equipment	MiFis (Mobile Beacon and Digital Wish) Devices	109,800
IT	914	4400	Non capitalized equipment	New Staff Technology	145,000
IT	914	4400	Non capitalized equipment	Replace Obsolete Devices	60,700
IT	914	4400	Non capitalized equipment	Chromebooks (Note: Student Chromebooks Should Code to Function 1000; Teacher Chromebooks Should Code to Function 2490)	1,000,000
IT	914	5510	Utilities	MiFis (Mobile Beacon and Digital Wish) / T-Mobile Hotspots / Cell Phone Monthly Service Fee	81,100
IT	914	5860	Professional Service Fees	Tax1099.com / E-File Platform for 1099s	1,500
IT	914	5863	Professional Development	AI Academy (Carleen App Development)	300,000
IT	914	5883	Outside Consultant and Services	Computer Repairs (Outside Contractor Services)	7,000
IT	914	5887	Student Technology Services	Zoom Video Communications, Inc. (Note: Student Should Code to 5887; Admin Staff Should Code to 5940)	49,600
IT	914	5887	Student Technology Services	Jamf Software	20,800
IT	914	5887	Student Technology Services	DocuSign	19,000
IT	914	5887	Student Technology Services	MS Office licensing Note: Admin Staff Should GL Account Code to 5940	20,700
IT	914	5887	Student Technology Services	Adobe Licensing Student Code to 5887 Staff Code to 5940	8,865
IT	914	5887	Student Technology Services	Monitoring Tool for Student G Suite (Managed Methods & G Suite Standard)	20,620
IT	914	5887	Student Technology Services	Lightspeed Web Filtering	95,600
IT	914	5887	Student Technology Services	Incident IQ Help Desk/Inventory System	18,500
IT	914	5887	Student Technology Services	Backup/Disaster Recovery	6,110
IT	914	5887	Student Technology Services	BoardOnTrack	6,435
IT	914	5887	Student Technology Services	Various Outside Contractors	500,000
IT	914	5887	Student Technology Services	Zapier Software	4,030
IT	914	5887	Student Technology Services	Scribe	29,970
IT	914	5887	Student Technology Services	Wisestamp	9,280
IT	914	5887	Student Technology Services	LiveChat	1,300

Comprehensive Department Budget

Department	Dpt Code	Code	Bucket	Items	2026-27 July Budget
IT	914	5887	Student Technology Services	Hapara	34,900
IT	914	5887	Student Technology Services	SEIS / SIS Integration (Vendor: San Joaquin County Office of Education & Invoice est. Arrival - Dec. to Feb)	900
IT	914	5887	Student Technology Services	Instructure Services CANVAS Mastery Connect	157,860
IT	914	5887	Student Technology Services	MagicSchool.Ai	38,130
IT	914	5887	Student Technology Services	SkillStruck	5,500
IT	914	5887	Student Technology Services	YellowFolder	23,000
IT	914	5887	Student Technology Services	OpenAI (ChatGPT Team Account)	19,500
IT	914	5887	Student Technology Services	Grade Guardian	9,200
IT	914	5887	Student Technology Services	Genially	300
IT	914	5887	Student Technology Services	Otter AI (for Leadership Team)	13,600
IT	914	5887	Student Technology Services	Cidi Labs - Instructional Design Tool for Canvas	17,000
IT	914	5887	Student Technology Services	Gimkit	1,000
IT	914	5940	Operating Expenditures, Technology	Web Hosting / development	28,000
IT	914	5940	Operating Expenditures, Technology	Server costs (AWS)	51,400
IT	914	5940	Operating Expenditures, Technology	OPS software	79,830
IT	914	5940	Operating Expenditures, Technology	School Pathways	243,485
IT	914	5940	Operating Expenditures, Technology	Finalsite/School Admin Enrollment	55,000
IT	914	5940	Operating Expenditures, Technology	Clever	15,085
IT	914	5940	Operating Expenditures, Technology	Splashtop	440
IT	914	5940	Operating Expenditures, Technology	Networks and Network Monitoring	14,800
IT	914	5940	Operating Expenditures, Technology	Amplified IT	18,600
IT	914	5940	Operating Expenditures, Technology	Fortinet Checkpoint Email Filtering	59,290
IT	914	5940	Operating Expenditures, Technology	Google Workspace for Education Standard	22,640
IT	914	5940	Operating Expenditures, Technology	iTopia	17,000
IT	914	5940	Operating Expenditures, Technology	XCITIUM	10,300
IT	914	5940	Operating Expenditures, Technology	Grammarly	4,900

Comprehensive Department Budget

Department	Dpt Code	Code	Bucket	Items	2026-27 July Budget
IT	914	5940	Operating Expenditures, Technology	Chatbase	4,600
IT	914	5940	Operating Expenditures, Technology	AWS Data Lake Development	121,800
IT	914	5940	Operating Expenditures, Technology	KnowBe4	17,490
IT	914	5940	Operating Expenditures, Technology	Gemini	88,200
IT	914	5940	Operating Expenditures, Technology	Bitwarden	675
IT	914	5940	Operating Expenditures, Technology	Descript Pro	1,000
IT	914	5940	Operating Expenditures, Technology	ClickUp	34,650
IT	914	5940	Operating Expenditures, Technology	Mailgun	420
IT	914	5940	Operating Expenditures, Technology	Zoho	5,100
IT	914	5940	Operating Expenditures, Technology	ID Card Software (ID Cards for Students)	300
IT	914	5940	Operating Expenditures, Technology	Parallels	2,700
IT	914	5940	Operating Expenditures, Technology	Tutor.com	127,200
IT	914	5940	Operating Expenditures, Technology	Staffing Management System	15,000
IT	914	5940	Operating Expenditures, Technology	GAMMA App	6,000
IT	914	5940	Operating Expenditures, Technology	Sage Intacct, System and Users	72,000
IT	914	5940	Operating Expenditures, Technology	Stampli	82,200
Operations & Accountability	902	4310	Materials and Supplies	Student Materials	2,000
Operations & Accountability	902	4320	Office Supplies	Staff Office Materials and Supplies Capitol Track	7,600
Operations & Accountability	902	4320	Office Supplies	Office Supplies and Materials	4,000
Operations & Accountability	902	5300	Dues and memberships	WASC SOCS-S Affiliation Request Fee	900
Operations & Accountability	902	5300	Dues and memberships	WASC Sage Oak Annual Fee	900
Operations & Accountability	902	5300	Dues and memberships	WASC Sage Oak- Keppel Annual Fee	900
Operations & Accountability	902	5610	Facility Rents & Leases	SPED Lodging - Testing Season	600
Operations & Accountability	902	5612	Testing Site	PFT Site Rentals, CAA 1:1 In-Person Testing	7,400
Operations & Accountability	902	5800	Professional Services	Hearing Officer	1,000
Operations & Accountability	902	5800	Professional Services	ScubaCat Educational Data, LLC (Rachel Hatch)	84,500
Operations & Accountability	902	5863	Professional Development	Dyslexia Initiative Grant (Literacy Screening PD)	35,200
Operations & Accountability	902	5878	Testing Services	i-Ready -Assessment and NWEA	39,500
Operations & Accountability	902	5887	Student Technology Services	DTS	900
Operations & Accountability	902	5940	Operating Expenditures, Technology	PARSEC Premium, PARSEC Reels, Admin Bridge Fee	84,000
PLA	912	4200	Supplemental Curriculum	PLT+ Curriculum	31,000
PLA	912	4200	Supplemental Curriculum	Curriculum for Prop 28 Art Program	23,600

Comprehensive Department Budget

Department	Dpt Code	Code	Bucket	Items	2026-27 July Budget
PLA	912	4310	Materials and Supplies	Dept. Leadership Materials for PLCs	1,400
PLA	912	4310	Materials and Supplies	Activities for Prop 28 Art - Material & Supplies	28,000
PLA	912	4320	Office Supplies	Student - In-Person Events and Supplies	32,400
PLA	912	4320	Office Supplies	Staff Meeting Materials & Supplies	10,300
PLA	912	4320	Office Supplies	Office Materials/Supplies	4,000
PLA	912	4330	Supplemental Curriculum	Activities for Prop 28 Art Activities & Events	30,800
PLA	912	5610	Facility rents and leases	PLC/Event Permits/Rents	29,700
PLA	912	5835	Field Trips	Field Trip Supplies	400
PLA	912	5835	Field Trips	Oakschool Field Trips	4,000
PLA	912	5835	Field Trips	Arts Field Trip	20,500
PLA	912	5881	Instructional Services	Field Trips (Instructional Funds)	231,100
Professional Development	907	5800	Professional Services	Training opportunities in Intacct	2,600
Professional Development	907	5863	Professional Development	Business related books and subscriptions	500
Professional Development	907	5863	Professional Development	PD Passport for Classified Staff	178,000
Professional Development	907	5863	Professional Development	PD Passport for Certificated Staff	740,820
Secondary	904	4200	Supplemental Curriculum	Online Math Supplemental Curriculum (Coding)	5,100
Secondary	904	4200	Supplemental Curriculum	Kami - Online Access w/ Canvas PDF	4,900
Secondary	904	4200	Supplemental Curriculum	Curriculum for 30 EAs for Synchronous Classes	17,600
Secondary	904	4200	Supplemental Curriculum	AVID Contract	6,000
Secondary	904	4200	Supplemental Curriculum	Pathful Curriculum	9,500
Secondary	904	4310	Materials and Supplies	Misc PE Supplies	1,900
Secondary	904	4310	Materials and Supplies	CTE Pathway Capstone Materials	4,200
Secondary	904	4320	Office Supplies	Office Supplies	700
Secondary	904	4350	Other Supplies	Graduation Other (Decor, Certificates, Cords, Diplomas, Boxes for Recognition)... etc.	17,500
Secondary	904	4381	IF Materials	StrongMind	287,700
Secondary	904	4381	IF Materials	eDynamics	71,900
Secondary	904	4381	IF Materials	Pointful Savvas Learning LLC	1,900
Secondary	904	4381	IF Materials	Avant Testing Service	300
Secondary	904	4381	IF Materials	Online AP Curriculum	3,100
Secondary	904	4381	IF Materials	eScience Forensic Kits	43,600
Secondary	904	4381	IF Materials	Mr. D OPS Catalog Order Bulking	138,200
Secondary	904	4381	IF Materials	Exact Path from the Edmentum Company	8,200
Secondary	904	5610	Facility rents and leases	Graduation Site Rental	9,200
Secondary	904	5835	Field Trips	CTE Pathway Capstone Trips	6,100
Secondary	904	5880	Instructional Vendors & Consultants	PE Activities	3,100
SPED	906	4310	Materials & Supplies	Testing Kits/Protocols	120,300
SPED	906	4310	Materials & Supplies	Independent Educational Evaluations (IEEs) (Verify With Kelly on Goal)	22,700
SPED	906	4310	Materials & Supplies	Assistive Technology	20,500
SPED	906	4310	Materials & Supplies	Curriculum/Supplemental Materials for M/M & M/S	15,400
SPED	906	4310	Materials & Supplies	Additional therapy Items From Related Service Providers	10,000
SPED	906	4310	Materials & Supplies	Materials and Supplies	4,000

Comprehensive Department Budget

Department	Dpt Code	Code	Bucket	Items	2026-27 July Budget
SPED	906	4310	Materials & Supplies	Low Incidence Equipment (Verify with Kelly on Goal)	10,000
SPED	906	4320	Office Materials	Staff Meetings - Supplies and Materials	10,000
SPED	906	4381	Instructional Funds - Materials	Additional Sped Materials (TeachTown)	164,900
SPED	906	5100	SpEd Consultants	Special Education Vendors/Vendored Services	196,000
SPED	906	5610	Facility Rents, & leases	Staff meetings - 2 Big Meetings $2.5K Per Room and 2 Extra Days $500 Per Day)	6,200
SPED	906	5612	Testing Site	Assessment Location Rentals	112,600
SPED	906	5860	Service Fees	Sonoma Selpa Fee	217,800
SPED	906	5887	Operating Expenditures, Student Service Technology	Goalbook/SLP Toolkit	26,000
SPED	906	5887	Operating Expenditures, Student Service Technology	Subscriptions	40,000
Stu Serv	905	4200	Supplemental Curriculum	School Provided Student Subscriptions	102,700
Stu Serv	905	4200	Supplemental Curriculum	MTSS Curriculum & Materials (PAGE and MTSS Curriculum)	96,500
Stu Serv	905	4200	Supplemental Curriculum	Gate Testing for - $11/ea	2,300
Stu Serv	905	4200	Supplemental Curriculum	Sage Crate 2.0 for Fall 26-27	500,000
Stu Serv	905	4310	Materials and Supplies	Gate Materials	1,000
Stu Serv	905	4320	Office Supplies	Office supplies	600
Stu Serv	905	4320	Office Supplies	New Teacher Orientation TF/EA/Sped	1,400
Stu Serv	905	4320	Office Supplies	Office Materials/Supplies	2,000
Stu Serv	905	4330	Events	Sage Stage	5,000
Stu Serv	905	4381	IF Materials	Bright Thinker Science Course	50,000
Stu Serv	905	5835	Field Trips	Field Trips, Events, & Competitions (PAGE Related Items)	5,500
Stu Serv	905	5863	Professional Development	Local Teacher Trainings (Summits)	215,000
Stu Serv	905	5863	Professional Development	Hotel Room Costs - August Summit & March Summit	75,000
Stu Serv	905	5880	Instructional vendors and consultants	Certification for Students (First Aid, CPR, CERT, Lifeguard Certification)	15,000
Stu Serv	905	5880	Instructional vendors and consultants	Student Leadership/Career Conference	50,000
Stu Serv	905	5881	Intructional Funds - Services	MiFi Hotspots Services - Instructional Funds	225,400
Stu Serv	905	5887	Student Technology Services	MTSS Tech	11,300
Stu Serv	905	5887	Student Technology Services	Verbit/Lifesigns - Deaf Interpreter	3,100
SUPERINTENDENT	900	4320	Office Supplies	Materials and Supplies	500
SUPERINTENDENT	900	5210	Mileage Reimbursements	Add On, Krista Travel	12,000
SUPERINTENDENT	900	5220	Travel and Conferences	Conference Fees/Hotel/Travel Expenses	328,600
SUPERINTENDENT	900	5220	Travel and Conferences	Admin Planning Sessions	100,000
SUPERINTENDENT	900	5800	Professional Services	Strategic Planning Consultant	106,100
SUPERINTENDENT	900	5810	Legal	Legal Fees	289,600
Virtual Academy Program	911	4200	Supplemental Curriculum	EdPuzzle	4,700
Virtual Academy Program	911	4200	Supplemental Curriculum	Blooket	2,400

Comprehensive Department Budget

Department	Dpt Code	Code	Bucket	Items	2026-27 July Budget
Virtual Academy Program	911	4200	Supplemental Curriculum	Classroom Screen	600
Virtual Academy Program	911	4200	Supplemental Curriculum	Raz Kids	2,500
Virtual Academy Program	911	4200	Supplemental Curriculum	Generation Genius TK-8	5,000
Virtual Academy Program	911	4200	Supplemental Curriculum	Mystery Science TK-5	4,000
Virtual Academy Program	911	4200	Supplemental Curriculum	TK-8 ELA Curriculum	140,000
Virtual Academy Program	911	4200	Supplemental Curriculum	TK- 8 Math Curriculum	65,000
Virtual Academy Program	911	4200	Supplemental Curriculum	TK-8 Science Curriculum	70,000
Virtual Academy Program	911	4200	Supplemental Curriculum	TK-8 Lab Kits Home Science Lab Kits QSL Lab Kits	90,000
Virtual Academy Program	911	4200	Supplemental Curriculum	TK-8 History Curriculum Studies Weekly TCI History Alive	45,000
Virtual Academy Program	911	4310	Materials and Supplies	Student School Supplies	320,000
Virtual Academy Program	911	4310	Materials and Supplies	Amazon Supplies for Oakschool Courses	30,000
Virtual Academy Program	911	4310	Materials and Supplies	Teachers Pay Teachers Digital Curriculum Purchases	2,700
Virtual Academy Program	911	4310	Materials and Supplies	In-Person PLC Meetings - Materials and Supplies	4,000
Virtual Academy Program	911	4310	Materials and Supplies	School-wide Student event Materials & Supplies	11,000
Virtual Academy Program	911	4310	Materials and Supplies	Student Printing and Planners	40,000
Virtual Academy Program	911	5610	Facility rents and leases	Site Rentals for In-Person PLC Meetings and VLA Meetings	6,000
Virtual Academy Program	911	5835	Field Trips	School Wide Field Trips and Events	105,000
Virtual Academy Program	911	5930	Postage	Stamps for Teachers	2,500

Assets					
Department	**Dpt Code**	**Code**	**Bucket**	**Items**	**2026-27 July Budget**
Bus Serv	907	9450	Work-in-Progress	1455 MPR Conversion Office Space	228,665
Bus Serv	907	9450	Work-in-Progress	1473 MPR Conversion Office Space	75,000

SAGE OAK
CHARTER SCHOOLS

Sage Oak Charter School
2026-27 July Budget

Summary Analysis

Sage Oak Charter School

Summary of Results

The 2026-27 July Budget projects a net revenue of $1.3M. The 2025-26 Estimated Actuals (EA) projects a net revenue of $936K. Positive net revenue and a strong reserve balance will allow Sage Oak Charter Schools to end the 2026-27 fiscal year with a reserve of $20.6M, which is 28.0% of annual expenditures.

Cash Flow

In the budgeted year's cash flow analysis, it was observed that the cash is projected to reach its lowest point at the end of February 2027, with $13.4M potential cash on hand. The cash reserve is deemed sufficient to sustain operations and safeguard against potential economic shocks.

Changes to Revenue

The 18.3% change in revenue from the 2025-26 EA to the 2026-27 July Budget is due to Local Control Funding Formula (LCFF), federal, and state revenues. Student average-daily-attendance (ADA) changed from 4,156 in the 2025-26 EA to 4,670 in the 2026-27 July Budget.

Changes to Expenditures

Sage Oak has an overall change of 17.9% in expenditures from the 2025-26 EA to the 2026-27 July Budget. The change is attributable to staffing, materials, and service costs associated with shifts in student enrollment.

Enrollment and ADA Assumptions

Sage Oak Charter School

2026-27		Enrollment	ADA	Unduplicated Pupil Percentage (UPP)
	TK-3	2,054	2,038	
	4-6	1,146	1,137	
	7-8	682	677	
	9-12	826	819	
	Total	4,708	4,670	2,595
	Growth	12.4 %	99.2 %	55.1 %

2027-28		Enrollment	ADA	UPP
	TK-3	2,222	2,204	
	4-6	1,240	1,230	
	7-8	739	733	
	9-12	894	887	
	Total	5,095	5,054	2,808
	Growth	8.2 %	99.2 %	55.1 %

2028-29		Enrollment	ADA	UPP
	TK-3	2,391	2,372	
	4-6	1,334	1,323	
	7-8	795	789	
	9-12	962	954	
	Total	5,482	5,438	3,022
	Growth	7.6 %	99.2 %	55.1 %

SAGE OAK CHARTER SCHOOLS

2026-27 JULY vs EA - Summary

Sage Oak Charter School

	2026-27 July	2025-26 EA	$ Change	% Change
Revenue				
Total LCFF Revenues	62,116,084	52,740,764	9,375,320	17.8 %
Total Federal Revenue	1,385,601	1,328,947	56,654	4.3 %
Total Other State Revenue	10,725,813	8,608,135	2,117,678	24.6 %
Total Local Revenue	509,562	509,562	0	0.0 %
Total Revenue	74,737,060	63,187,408	11,549,652	18.3 %
Expenditures				
Total 1000-1999 Certificated Salaries	30,307,738	24,995,509	5,312,229	21.3 %
Total 2000-2999 Classified Salaries	8,236,456	6,410,869	1,825,587	28.5 %
Total 3000-3999 Employee Benefits	14,105,590	11,195,102	2,910,488	26.0 %
Total 4100-4799 Books, Materials, & Supplies	7,001,750	6,931,400	70,350	1.0 %
Total 5100-5999 Services & Other Operating Expenditures	13,554,432	12,654,520	899,912	7.1 %
Total 6100-6999 Capital Outlay	162,967	64,368	98,599	153.2 %
Total Expenditures	73,368,933	62,251,768	11,117,165	17.9 %
Operating Income/(Loss)	1,368,127	935,640	432,487	46.2 %
Net Assets				
9791 - Beginning Fund Balance	19,197,350	18,261,710	935,640	5.1 %
Total Net Assets	19,197,350	18,261,710	935,640	5.1 %
Change In Net Assets	1,368,127	935,640	432,487	46.2 %
Total Net Assets	20,565,477	19,197,350	1,368,127	7.1 %

Net revenue as a % of expense	1.9 %	1.5 %
Fund balance as a % of expense	28.0 %	30.8 %
Days of Potential Cash	102	113

SAGE OAK CHARTER SCHOOLS

2026-27 JULY vs EA - Detail

Sage Oak Charter School

	2026-27 July	2025-26 EA	$ Change	% Change	Notes
Revenue					
LCFF Revenue					
8011 - LCFF General Entitlement	60,431,256	51,165,456	9,265,800	18.1 %	
8012 - EPA Entitlement	934,042	831,254	102,788	12.4 %	
8019 - Prior Year Unrestricted Revenue	0	(7,229)	7,229	(100.0) %	
8096 - In-Lieu-Of Property Taxes	750,786	751,283	(497)	(0.1) %	
Total LCFF Revenues	62,116,084	52,740,764	9,375,320	17.8 %	The change is due to enrollment and ADA.
Federal Revenue					
8181 - Federal IDEA SpEd Revenue	555,198	598,551	(43,353)	(7.2) %	The change is due to the updated allocations from the SELPA.
8182 - SpEd - Discretionary Grants	42,125	42,125	0	0.0 %	
8290 - Other Federal Revenue	788,278	688,271	100,007	14.5 %	The change is due to the updated allocations from the California Department of Education (CDE).
Total Federal Revenue	1,385,601	1,328,947	56,654	4.3 %	
Other State Revenue					
8311 - AB602 State SpEd Revenue	6,258,062	3,813,497	2,444,565	64.1 %	The change is due to enrollment and ADA.
8550 - Mandated Cost Reimbursements	116,178	103,745	12,433	12.0 %	
8560 - Lottery- Unrestricted	926,787	809,739	117,048	14.5 %	
8561 - Lottery- Prop 20 - Restricted	399,983	337,603	62,380	18.5 %	
8590 - Other State Revenue	3,024,803	3,543,551	(518,748)	(14.6) %	The change is due to recognizing the one-time AMIM grant.
Total Other State Revenue	10,725,813	8,608,135	2,117,678	24.6 %	The change is due to enrollment and ADA.
Local Revenue					
8660 - Interest Income	509,562	509,562	0	0.0 %	
Total Local Revenue	509,562	509,562	0	0.0 %	
Total Revenue	74,737,060	63,187,408	11,549,652	18.3 %	
Expenditures					
1000-1999 Certificated Salaries					
1100 Certificated Teachers Salaries	19,541,122	16,626,773	2,914,349	17.5 %	
1200 Certificated Pupil Support	7,344,995	5,249,391	2,095,604	39.9 %	
1300 Certificated Supervisors and Administrators Salaries	3,421,621	3,119,345	302,276	9.7 %	
Total 1000-1999 Certificated Salaries	30,307,738	24,995,509	5,312,229	21.3 %	The change is due to staffing needs aligned with student enrollment.
2000-2999 Classified Salaries					
2100 Classified Instructional Salaries	1,301,575	948,419	353,156	37.2 %	
2300 Classified Supervisors and Admin Salaries	3,328,538	2,909,568	418,970	14.4 %	
2400 Clerical, Technical and Office Salaries	3,606,343	2,552,882	1,053,461	41.3 %	
Total 2000-2999 Classified Salaries	8,236,456	6,410,869	1,825,587	28.5 %	The change is due to staffing needs aligned with student enrollment.
3000-3999 Employee Benefits					
3101-3102 STRS					
3101 - STRS Certificated	5,773,779	4,769,569	1,004,210	21.1 %	
Total 3101-3102 STRS	5,773,779	4,769,569	1,004,210	21.1 %	The change is due to staffing needs aligned with student enrollment.
3301-3302 OASDI/Medicare/Alternative					
3313 - Medicare - Certificated	453,320	372,610	80,710	21.7 %	
3314 - Medicare - Classified	122,329	94,168	28,161	29.9 %	
3355 - OASDI - Certificated	0	4,745	(4,745)	(100.0) %	The change is due to the projected number of staff contributing to Social Security Taxes.
3356 - OASDI - Classified	523,062	400,945	122,117	30.5 %	
Total 3301-3302 OASDI/Medicare/Alternative	1,098,711	872,468	226,243	25.9 %	The change is due to staffing needs aligned with student enrollment.
3401-3402 Health and Welfare Benefits					
3401 - Health Care Certificated	3,389,286	2,836,812	552,474	19.5 %	
3402 - Health Care Classified	1,297,503	1,024,550	272,953	26.6 %	
Total 3401-3402 Health and Welfare Benefits	4,686,789	3,861,362	825,427	21.4 %	The change is due to staffing needs aligned with student enrollment.
3501-3502 Unemployment Insurance					
3501 - Unemployment Insurance Certificated	71,432	71,522	(90)	(0.1) %	
3502 - Unemployment Insurance Classified	33,163	36,596	(3,433)	(9.4) %	
Total 3501-3502 Unemployment Insurance	104,595	108,118	(3,523)	(3.3) %	The change is due to staff turnover and retention rates, along with current hiring conditions.

2026-27 JULY vs EA - Detail

Sage Oak Charter School

	2026-27 July	2025-26 EA	$ Change	% Change	Notes
3601-3602 Workers' Compensation					
3601 - Workers' Comp Certificated	148,501	91,996	56,505	61.4 %	
3602 - Workers' Comp Classified	40,074	23,250	16,824	72.4 %	
Total 3601-3602 Workers' Compensation	188,575	115,246	73,329	63.6 %	The change is due to staffing needs aligned with student enrollment.
3901-3922 Other Employee Benefits					
3901 - Other Benefits Cert	1,143,835	894,792	249,043	27.8 %	
3902 - Other Benefits Class	288,125	175,057	113,068	64.6 %	
3922 - 457b Employer match-Classified	821,181	398,490	422,691	106.1 %	
Total 3901-3922 Other Employee Benefits	2,253,141	1,468,339	784,802	53.4 %	The change is due to staffing needs aligned with student enrollment.
Total 3000-3999 Employee Benefits	14,105,590	11,195,102	2,910,488	26.0 %	
4100-4799 Books, Materials, & Supplies					
4200 Books and Other Reference Materials					
4200 - Other Reference Materials	922,528	431,341	491,187	113.9 %	
Total 4200 Books and Other Reference Materials	922,528	431,341	491,187	113.9 %	The change is due to coding alignment for Sage Crates curriculum.
4300 Materials and Supplies					
4310 - Materials & Supplies	494,722	457,162	37,560	8.2 %	The change is due to materials and supplies for students based on enrollment.
4320 - Office Supplies	237,766	126,938	110,828	87.3 %	The change is due to upgrading staff MiFi devices.
4330 - Meals	26,886	14,044	12,842	91.4 %	The change is due to planned activities for students.
4350 - Other Supplies - Materials & Supplies	13,143	10,897	2,246	20.6 %	The change is due to graduation supplies.
4381 - Instructional Funds - Materials	4,401,224	3,938,869	462,355	11.7 %	The change is due to enrollment and the Instructional Funds (IF) rate.
Total 4300 Materials and Supplies	5,173,741	4,547,910	625,831	13.8 %	
4400 Noncapitalized Equipment					
4400 - Non-Capitalized Equipment	905,481	1,952,149	(1,046,668)	(53.6) %	The change is due to planned student Chromebook replacements.
Total 4400 Noncapitalized Equipment	905,481	1,952,149	(1,046,668)	(53.6) %	
Total 4100-4799 Books, Materials, & Supplies	7,001,750	6,931,400	70,350	1.0 %	
5100-5999 Services & Other Operating Expenditures					
5100 Subagreements for Services					
5100 - SpEd Consultants and Vendors Subagreements for Service	147,196	441,248	(294,052)	(66.6) %	
Total 5100 Subagreements for Services	147,196	441,248	(294,052)	(66.6) %	The change is due to employee recruitment in place of external consultants.
5200 Travel and Conferences					
5210 - Mileage Reimbursements	18,474	17,112	1,362	8.0 %	
5220 - Travel & Lodging	321,879	274,221	47,658	17.4 %	The change is due to staff attendance at professional development conferences.
Total 5200 Travel and Conferences	340,353	291,333	49,020	16.8 %	
5300 Dues and Memberships					
5300 - Dues & Memberships	175,032	127,684	47,348	37.1 %	
Total 5300 Dues and Memberships	175,032	127,684	47,348	37.1 %	The change is due to membership fees based on student enrollment.
5400 Insurance					
5400 - Insurance	187,750	176,638	11,112	6.3 %	
Total 5400 Insurance	187,750	176,638	11,112	6.3 %	The change is due to estimated contract costs for the year.
5500 Operations and Housekeeping Services					
5510 - Utilities (General)	121,737	127,098	(5,361)	(4.2) %	
Total 5500 Operations and Housekeeping Services	121,737	127,098	(5,361)	(4.2) %	The change is due to Hotspot services.
5600 Rents, Leases, Repairs, and Noncap. Improvements					
5610 - Facility Rents & Leases	785,226	791,226	(6,000)	(0.8) %	The change is due to facility costs based on current lease estimates.
5612 - Testing Site	90,120	68,896	21,224	30.8 %	The change is due to Special Education assessment site rentals.
5620 - Equipment Leases	4,356	4,203	153	3.6 %	
Total 5600 Rents, Leases, Repairs, and Noncap. Improvements	879,702	864,325	15,377	1.8 %	

2026-27 JULY vs EA - Detail

Sage Oak Charter School

	2026-27 July	2025-26 EA	$ Change	% Change	Notes
5800 Professional/Consulting Services and Operating Expend.					
5800 - Professional Services - Non-instructional	229,630	211,339	18,291	8.7 %	The change is due to marketing consultant services supporting data systems.
5810 - Legal	217,490	210,090	7,400	3.5 %	The change is due to the engagement of legal counsel.
5820 - Audit & CPA	48,815	53,606	(4,791)	(8.9) %	The change is due to the updated contract for audit services.
5835 - Field Trips	106,266	96,430	9,836	10.2 %	The change is due to student field trips.
5840 - Advertising & Recruitment	63,310	89,466	(26,156)	(29.2) %	The change is due to advertising expenses supporting marketing and recruitment.
5850 - Oversight Fees	1,855,250	1,582,223	273,027	17.3 %	The change is due to enrollment.
5860 - Service Fees	352,982	333,797	19,185	5.7 %	The change is due to service fees for the Human Resources (HR) management system.
5863 - Professional Development	1,312,957	588,681	724,276	123.0 %	The change is due to professional development opportunities for teachers and staff.
5870 - Livescan Fingerprinting	563	846	(283)	(33.5) %	The change is due to the number of Livescan reimbursements.
5877 - Lending Library	9,538	279,119	(269,581)	(96.6) %	The change is due to coding alignment for Sage Crates curriculum.
5878 - Student Assessment	29,664	26,893	2,771	10.3 %	The change is due to the updated quote for the i-Ready assessment.
5880 - Instructional Vendors & Consultants	51,143	194,023	(142,880)	(73.6) %	The change is due to continued student conferences aligned with participation requirements.
5881 - Instructional Funds - Services	5,379,274	4,814,174	565,100	11.7 %	The change is due to enrollment and the IF rate.
5883 - Outside Consultant and Services	32,218	11,467	20,751	181.0 %	The change is due to contracting an outside consultant to update job descriptions.
5887 - Student Service Technology	914,830	783,829	131,001	16.7 %	The change is due to additional technology programs for students and staff.
Total 5800 Professional/Consulting Services and Operating Expend.	10,603,930	9,275,983	1,327,947	14.3 %	
5900 Communications					
5930 - Postage	110,022	105,957	4,065	3.8 %	The change is due to warehouse shipping expenses.
5940 - Technology Services	988,710	1,244,254	(255,544)	(20.5) %	The change is due to coding alignment for IT projects.
Total 5900 Communications	1,098,732	1,350,211	(251,479)	(18.6) %	
Total 5100-5999 Services & Other Operating Expenditures	13,554,432	12,654,520	899,912	7.1 %	
6100-6999 Capital Outlay					
Capital Expenditures					
6901 - Depreciation Expense-Leasehold Improvements	162,967	64,368	98,599	153.2 %	
Total Capital Expenditures	162,967	64,368	98,599	153.2 %	The change is due to depreciation on capitalized equipment and leasehold improvements.
Total 6100-6999 Capital Outlay	162,967	64,368	98,599	153.2 %	
Total Expenditures	73,368,933	62,251,768	11,117,165	17.9 %	
Operating Income/(Loss)	1,368,127	935,640	432,487	46.2 %	
Net Assets					
9791 - Beginning Fund Balance	19,197,350	18,261,710	935,640	5.1 %	
Total Net Assets	19,197,350	18,261,710	935,640	5.1 %	
Change In Net Assets	1,368,127	935,640	432,487	46.2 %	
Total Net Assets	20,565,477	19,197,350	1,368,127	7.1 %	

Net revenue as a % of expense	1.9 %	1.5 %
Fund balance as a % of expense	28.0 %	30.8 %
Days of Potential Cash	102	113

SAGE OAK CHARTER SCHOOLS

2026-27 JULY vs EA - MYP Summary

Sage Oak Charter School

Enrollment	4,708	5,095	5,482
ADA	4,670	5,054	5,438
COLA	2.87 %	3.06 %	3.34 %

	2026-27 July	2027-28	2028-29
Revenue			
Total LCFF Revenues	62,116,084	69,684,350	77,480,311
Total Federal Revenue	1,385,601	1,345,632	1,345,632
Total Other State Revenue	10,725,813	10,778,583	11,158,149
Total Local Revenue	509,562	509,562	509,562
Total Revenue	74,737,060	82,318,127	90,493,654
Expenditures			
Total 1000-1999 Certificated Salaries	30,307,738	33,290,093	36,379,838
Total 2000-2999 Classified Salaries	8,236,456	9,207,287	10,211,859
Total 3000-3999 Employee Benefits	14,105,590	15,982,361	17,623,325
Total 4100-4799 Books, Materials, & Supplies	7,001,750	7,396,517	8,109,450
Total 5100-5999 Services & Other Operating Expenditures	13,554,432	14,331,771	15,595,153
Total 6100-6999 Capital Outlay	162,967	170,706	174,575
Total Expenditures	73,368,933	80,378,735	88,094,200
Operating Income/(Loss)	1,368,127	1,939,392	2,399,454
Net Assets			
9791 - Beginning Fund Balance	19,197,350	20,565,477	22,504,869
Total Net Assets	19,197,350	20,565,477	22,504,869
Change In Net Assets	1,368,127	1,939,392	2,399,454
Total Net Assets	20,565,477	22,504,869	24,904,323

Net revenue as a % of expense	1.9 %	2.4 %	2.7 %
Fund balance as a % of expense	28.0 %	28.0 %	28.3 %
Days of Potential Cash	102	102	103

SAGE OAK CHARTER SCHOOLS

2026-27 JULY vs EA - MYP Detail

Sage Oak Charter School

	2026-27 July	2027-28	2028-29
Revenue			
LCFF Revenue			
8011 - LCFF General Entitlement	60,431,256	67,923,420	75,642,600
8012 - EPA Entitlement	934,042	1,010,848	1,087,629
8096 - In-Lieu-Of Property Taxes	750,786	750,082	750,082
Total LCFF Revenues	62,116,084	69,684,350	77,480,311
Federal Revenue			
8181 - Federal IDEA SpEd Revenue	555,198	555,198	555,198
8182 - SpEd - Discretionary Grants	42,125	42,125	42,125
8290 - Other Federal Revenue	788,278	748,309	748,309
Total Federal Revenue	1,385,601	1,345,632	1,345,632
Other State Revenue			
8311 - AB602 State SpEd Revenue	6,258,062	6,979,919	7,760,936
8550 - Mandated Cost Reimbursements	116,178	135,006	150,921
8560 - Lottery- Unrestricted	926,787	1,003,001	1,079,186
8561 - Lottery- Prop 20 - Restricted	399,983	432,874	465,754
8590 - Other State Revenue	3,024,803	2,227,783	1,701,352
Total Other State Revenue	10,725,813	10,778,583	11,158,149
Local Revenue			
8660 - Interest Income	509,562	509,562	509,562
Total Local Revenue	509,562	509,562	509,562
Total Revenue	74,737,060	82,318,127	90,493,654
Expenditures			
1000-1999 Certificated Salaries			
1100 Certificated Teachers Salaries	19,541,122	22,038,980	24,622,425
1200 Certificated Pupil Support	7,344,995	7,675,520	8,020,918
1300 Certificated Supervisors and Administrators Salaries	3,421,621	3,575,593	3,736,495
Total 1000-1999 Certificated Salaries	30,307,738	33,290,093	36,379,838
2000-2999 Classified Salaries			
2100 Classified Instructional Salaries	1,301,575	1,360,146	1,421,353
2300 Classified Supervisors and Admin Salaries	3,328,538	3,478,323	3,634,848
2400 Clerical, Technical and Office Salaries	3,606,343	4,368,818	5,155,658
Total 2000-2999 Classified Salaries	8,236,456	9,207,287	10,211,859
3000-3999 Employee Benefits			
3101 - STRS Certificated	5,773,779	6,531,193	7,323,868
Total 3101-3102 STRS	5,773,779	6,531,193	7,323,868

SAGE OAK CHARTER SCHOOLS

2026-27 JULY vs EA - MYP Detail

Sage Oak Charter School

	2026-27 July	2027-28	2028-29
3301-3302 OASDI/Medicare/Alternative			
3313 - Medicare - Certificated	453,320	503,184	558,533
3314 - Medicare - Classified	122,329	135,785	150,721
3356 - OASDI - Classified	523,062	546,600	571,197
Total 3301-3302 OASDI/Medicare/Alternative	1,098,711	1,185,569	1,280,451
3401-3402 Health and Welfare Benefits			
3401 - Health Care Certificated	3,389,286	3,762,108	4,175,940
3402 - Health Care Classified	1,297,503	1,381,840	1,471,659
Total 3401-3402 Health and Welfare Benefits	4,686,789	5,143,948	5,647,599
3501-3502 Unemployment Insurance			
3501 - Unemployment Insurance Certificated	71,432	74,650	79,469
3502 - Unemployment Insurance Classified	33,163	34,655	38,467
Total 3501-3502 Unemployment Insurance	104,595	109,305	117,936
3601-3602 Workers' Compensation			
3601 - Workers' Comp Certificated	148,501	158,153	168,433
3602 - Workers' Comp Classified	40,074	42,678	45,452
Total 3601-3602 Workers' Compensation	188,575	200,831	213,885
3901-3922 Other Employee Benefits			
3901 - Other Benefits Cert	1,143,835	1,528,920	1,619,449
3902 - Other Benefits Class	288,125	357,774	388,117
3922 - 457b Employer match-Classified	821,181	924,821	1,032,020
Total 3901-3922 Other Employee Benefits	2,253,141	2,811,515	3,039,586
Total 3000-3999 Employee Benefits	14,105,590	15,982,361	17,623,325
4100-4799 Books, Materials, & Supplies			
4200 Books and Other Reference Materials			
4200 - Other Reference Materials	922,528	970,704	1,031,388
Total 4200 Books and Other Reference Materials	922,528	970,704	1,031,388
4300 Materials and Supplies			
4310 - Materials & Supplies	494,722	495,657	521,794
4320 - Office Supplies	237,766	182,182	193,337
4330 - Meals & Events	26,886	27,784	29,186
4350 - Other Supplies - Materials & Supplies	13,143	13,590	14,284
4381 - Instructional Funds - Materials	4,401,224	4,787,236	5,352,004
Total 4300 Materials and Supplies	5,173,741	5,506,449	6,110,605
4400 Noncapitalized Equipment			
4400 - Non-Capitalized Equipment	905,481	919,364	967,457
Total 4400 Noncapitalized Equipment	905,481	919,364	967,457
Total 4100-4799 Books, Materials, & Supplies	7,001,750	7,396,517	8,109,450

2026-27 JULY vs EA - MYP Detail

Sage Oak Charter School

	2026-27 July	2027-28	2028-29
5100-5999 Services & Other Operating Expenditures			
5100 Subagreements for Services			
5100 - SpEd Consultants and Vendors Subagreements for Service	147,196	162,401	179,902
Total 5100 Subagreements for Services	147,196	162,401	179,902
5200 Travel and Conferences			
5210 - Mileage Reimbursements	18,474	20,763	21,851
5220 - Travel & Lodging	321,879	355,303	373,857
Total 5200 Travel and Conferences	340,353	376,066	395,708
5300 Dues and Memberships			
5300 - Dues & Memberships	175,032	134,994	141,798
Total 5300 Dues and Memberships	175,032	134,994	141,798
5400 Insurance			
5400 - Insurance	187,750	136,389	139,344
Total 5400 Insurance	187,750	136,389	139,344
5500 Operations and Housekeeping Services			
5510 - Utilities (General)	121,737	105,625	114,195
Total 5500 Operations and Housekeeping Services	121,737	105,625	114,195
5600 Rents, Leases, Repairs, and Noncap. Improvements			
5610 - Facility Rents & Leases	785,226	790,692	809,926
5612 - Testing Site	90,120	98,075	108,868
5620 - Equipment Leases	4,356	4,530	4,787
Total 5600 Rents, Leases, Repairs, and Noncap. Improvements	879,702	893,297	923,581

2026-27 JULY vs EA - MYP Detail

Sage Oak Charter School

	2026-27 July	2027-28	2028-29
5800 Professional/Consulting Services and Operating Expend.			
5800 - Professional Services - Non-instructional	229,630	253,680	261,978
5810 - Legal	217,490	224,688	236,421
5820 - Audit & CPA	48,815	48,094	50,573
5835 - Field Trips	106,266	107,852	114,195
5840 - Advertising & Recruitment	63,310	64,704	67,097
5850 - Oversight Fees	1,855,250	2,090,531	2,324,409
5860 - Service Fees	352,982	364,514	383,586
5863 - Professional Development	1,312,957	1,286,082	1,341,716
5870 - Livescan Fingerprinting	563	2,786	3,521
5877 - Lending Library	9,538	10,117	10,887
5878 - Student Assessment	29,664	30,653	32,274
5880 - Instructional Vendors & Consultants	51,143	51,491	52,735
5881 - Instructional Funds - Services	5,379,274	5,851,066	6,541,339
5883 - Outside Consultant and Services	32,218	33,296	35,054
5887 - Student Service Technology	914,830	976,279	1,042,962
Total 5800 Professional/Consulting Services and Operating Expend.	10,603,930	11,395,833	12,498,747
5900 Communications			
5930 - Postage	110,022	113,703	119,677
5940 - Technology Services	988,710	1,013,463	1,082,201
Total 5900 Communications	1,098,732	1,127,166	1,201,878
Total 5100-5999 Services & Other Operating Expenditures	13,554,432	14,331,771	15,595,153

2026-27 JULY vs EA - MYP Detail

Sage Oak Charter School

	2026-27 July	2027-28	2028-29
6100-6999 Capital Outlay			
Capital Expenditures			
6901 - Depreciation Expense-Leasehold Improvements	162,967	170,706	174,575
Total Capital Expenditures	162,967	170,706	174,575
Total 6100-6999 Capital Outlay	162,967	170,706	174,575
Total Expenditures	73,368,933	80,378,735	88,094,200
Operating Income/(Loss)	1,368,127	1,939,392	2,399,454
Net Assets			
9791 - Beginning Fund Balance	19,197,350	20,565,477	22,504,869
Total Net Assets	19,197,350	20,565,477	22,504,869
Change In Net Assets	1,368,127	1,939,392	2,399,454
Total Net Assets	20,565,477	22,504,869	24,904,323

Net revenue as a % of expense	1.9 %	2.4 %	2.7 %
Fund balance as a % of expense	28.0 %	28.0 %	28.3 %
Days of Potential Cash	102	102	103

SAGE OAK CHARTER SCHOOLS

2026-27 JULY vs EA
Cash Flow Statement 2026-27
Sage Oak Charter School

	Year Ending 06/30/2027	Month Ending 07/31/2026	Month Ending 08/31/2026	Month Ending 09/30/2026	Month Ending 10/31/2026	Month Ending 11/30/2026	Month Ending 12/31/2026	Month Ending 01/31/2027	Month Ending 02/28/2027	Month Ending 03/31/2027	Month Ending 04/30/2027	Month Ending 05/31/2027	Month Ending 06/30/2027		
	2026-27 July	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Total	Variance
Cash Balance															
Beginning Cash	19,197,350	19,197,350	21,857,775	17,386,270	17,641,002	17,386,574	16,607,646	15,179,443	16,065,916	13,444,405	21,617,147	19,118,345	18,304,668		
Net Cash for Period															
REVENUES	74,737,060	3,030,041	3,060,541	6,111,140	5,378,373	5,415,641	6,001,476	6,200,559	7,259,037	8,542,840	7,491,890	7,599,114	8,646,408	74,737,060	0
EXPENDITURES	73,368,933	4,472,880	5,982,633	6,117,659	5,867,423	6,030,804	6,399,979	5,801,510	6,393,047	6,132,209	6,157,150	6,170,838	7,842,801	73,368,933	0
Net Cash for Period	1,368,127	(1,442,839)	(2,922,092)	(6,519)	(489,050)	(615,163)	(398,503)	399,049	865,990	2,410,631	1,334,740	1,428,276	803,607	1,368,127	0
Accounts Receivable	6,162,909	(5,697,609)	(337,727)	191,666	11,093	(3,081)	(174,410)	226,795	5,136,785	(4,903,827)	4,462,562	888,691	6,361,971	6,162,909	0
Other Assets	1,525,792	29,876	14,775	2,477	2,240	11,673	16,724	42,856	154,838	49,797	5,973	42,408	1,152,155	1,525,792	0
Accounts Payable	3,928,688	(1,721,633)	(1,623,925)	662,457	381,894	(148,787)	(967,697)	890,526	770,609	885,371	648,756	(2,208,756)	6,359,873	3,928,688	0
Deferred Revenue/Prepaid Expenses	3,760,013	157,164	(248,440)	(207,063)	(133,939)	(6,386)	(219,689)	(133,451)	1,033,513	22,710	(13,763)	897,902	2,611,455	3,760,013	0
Cash at End of Period	20,565,477	21,857,775	17,386,270	17,641,002	17,386,574	16,607,646	15,179,443	16,065,916	13,444,405	21,617,147	19,118,345	18,304,668	20,565,477		
Days of Potential Cash	102	109	86	88	86	83	76	80	67	108	95	91	102		

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2026-27 JULY vs EA
Cash Flow Statement 2027-28
Sage Oak Charter School

	Year Ending 06/30/2028	Month Ending 07/31/2027	Month Ending 08/31/2027	Month Ending 09/30/2027	Month Ending 10/31/2027	Month Ending 11/30/2027	Month Ending 12/31/2027	Month Ending 01/31/2028	Month Ending 02/29/2028	Month Ending 03/31/2028	Month Ending 04/30/2028	Month Ending 05/31/2028	Month Ending 06/30/2028		
	2026-27 July	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Total	Variance
Cash Balance															
Beginning Cash	20,565,477	20,565,477	19,971,019	17,115,521	18,575,436	19,836,435	21,345,767	20,663,720	22,252,122	24,459,939	25,949,100	26,802,383	23,981,828		
Net Cash for Period															
REVENUES	82,318,127	4,115,906	4,115,906	7,408,631	7,408,631	7,408,631	7,408,631	7,408,631	7,408,631	7,408,631	7,408,631	7,408,631	7,408,631	82,318,127	0
EXPENDITURES	80,378,735	2,893,634	5,473,792	6,374,034	6,293,655	5,819,420	7,033,139	6,269,541	6,277,579	6,486,564	7,089,404	8,841,661	11,526,310	80,378,735	0
Net Cash for Period	1,939,392	1,222,272	(1,357,885)	1,034,598	1,114,976	1,589,211	375,492	1,139,090	1,131,052	922,068	319,227	(1,433,029)	(4,117,679)	1,939,392	0
Accounts Receivable	6,113,108	120,428	4,279		8,558	18,951	62,965	161,386	575,243	177,891	22,007	159,552	4,801,846	6,113,108	0
Accounts Payable	3,501,653	(1,714,059)	(1,317,322)	571,820	259,823	(60,929)	(827,441)	720,640	819,737	731,145	556,062	(1,975,633)	5,737,808	3,501,653	0
Deferred Revenue/Prepaid Expenses	2,611,455	17,758	(176,012)	(146,503)	(105,242)		(167,133)	(109,942)	832,271	13,841		747,660	1,704,758	2,611,455	0
Cash at End of Period	22,504,869	19,971,019	17,115,521	18,575,436	19,836,435	21,345,767	20,663,720	22,252,122	24,459,939	25,949,100	26,802,383	23,981,828	22,504,869		
Days of Potential Cash	102	91	78	84	90	97	94	101	111	118	122	109	102		

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CHARTER SCHOOL JULY BUDGET
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2026 to June 30, 2027

Charter School Name: Sage Oak Charter School
CDS #: 36677360136069
Charter Approving Entity: Helendale Elementary School District
County: San Bernardino
Charter #: 1885

This charter school uses the following basis of accounting:
(Please enter an "X" in the applicable box below; check only one box)

[X] **Accrual Basis** (Applicable Capital Assets/Interest on Long-Term Debt/Long-Term Liabilities/Net Position objects are 6900, 6910, 7438, 9400-9489, 9660-9669, 9796, and 9797)

[ ] **Modified Accrual Basis** (Applicable Capital Outlay/Debt Service/Fund Balance objects are 6100-6170, 6200-6500, 6600, 7438, 7439, and 9711-9789)

Description	Object Code	Unrestricted	Restricted	Total
A. REVENUES				
1. LCFF Sources				
State Aid - Current Year	8011	60,431,256.00		60,431,256.00
Education Protection Account State Aid - Current Year	8012	934,042.00		934,042.00
State Aid - Prior Years	8019	0.00		0.00
Transfers to Charter Schools in Lieu of Property Taxes	8096	750,786.00		750,786.00
Other LCFF Transfers	8091, 8097			0.00
Total, LCFF Sources		62,116,084.00	0.00	62,116,084.00
2. Federal Revenues (see NOTE in Section L)				
No Child Left Behind/Every Student Succeeds Act	8290			0.00
Special Education - Federal	8181, 8182		597,323.00	597,323.00
Child Nutrition - Federal	8220			0.00
Donated Food Commodities	8221			0.00
Other Federal Revenues	8110, 8260-8299		788,278.00	788,278.00
Total, Federal Revenues		0.00	1,385,601.00	1,385,601.00
3. Other State Revenues				
Special Education - State	StateRevSE		6,258,062.00	6,258,062.00
All Other State Revenues	StateRevAO	1,042,965.00	3,424,786.00	4,467,751.00
Total, Other State Revenues		1,042,965.00	9,682,848.00	10,725,813.00
4. Other Local Revenues				
All Other Local Revenues	LocalRevAO	509,563.00	0.00	509,563.00
Total, Local Revenues		509,563.00	0.00	509,563.00
5. TOTAL REVENUES		63,668,612.00	11,068,449.00	74,737,061.00
B. EXPENDITURES (see NOTE in Section L)				
1. Certificated Salaries				
Certificated Teachers' Salaries	1100	16,272,638.00	3,268,484.00	19,541,122.00
Certificated Pupil Support Salaries	1200	3,631,405.00	3,713,590.00	7,344,995.00
Certificated Supervisors' and Administrators' Salaries	1300	3,105,230.00	316,391.00	3,421,621.00
Other Certificated Salaries	1900			0.00
Total, Certificated Salaries		23,009,273.00	7,298,465.00	30,307,738.00
2. Noncertificated Salaries				
Noncertificated Instructional Salaries	2100	658,245.00	643,330.00	1,301,575.00
Noncertificated Support Salaries	2200			0.00
Noncertificated Supervisors' and Administrators' Salaries	2300	3,170,030.00	158,508.00	3,328,538.00
Clerical, Technical and Office Salaries	2400	3,480,627.00	125,716.00	3,606,343.00
Other Noncertificated Salaries	2900			0.00
Total, Noncertificated Salaries		7,308,902.00	927,554.00	8,236,456.00

CHARTER SCHOOL JULY BUDGET

FINANCIAL REPORT -- ALTERNATIVE FORM

July 1, 2026 to June 30, 2027

Charter School Name: Sage Oak Charter School

CDS #: 36677360136069

Description	Object Code	Unrestricted	Restricted	Total
3. Employee Benefits				
STRS	3101-3102	4,549,455.00	1,224,324.00	5,773,779.00
PERS	3201-3202			0.00
OASDI / Medicare / Alternative	3301-3302	929,052.00	169,659.00	1,098,711.00
Health and Welfare Benefits	3401-3402	3,775,737.00	911,052.00	4,686,789.00
Unemployment Insurance	3501-3502	82,317.00	22,278.00	104,595.00
Workers' Compensation Insurance	3601-3602	152,587.00	35,988.00	188,575.00
OPEB, Allocated	3701-3702			0.00
OPEB, Active Employees	3751-3752			0.00
Other Employee Benefits	3901-3902	1,867,841.00	385,300.00	2,253,141.00
Total, Employee Benefits		11,356,989.00	2,748,601.00	14,105,590.00
4. Books and Supplies				
Approved Textbooks and Core Curricula Materials	4100			0.00
Books and Other Reference Materials	4200	890,220.00	32,308.00	922,528.00
Materials and Supplies	4300	4,890,013.00	283,728.00	5,173,741.00
Noncapitalized Equipment	4400	905,481.00	0.00	905,481.00
Food	4700			0.00
Total, Books and Supplies		6,685,714.00	316,036.00	7,001,750.00
5. Services and Other Operating Expenditures				
Subagreements for Services	5100	0.00	147,196.00	147,196.00
Travel and Conferences	5200	340,353.00		340,353.00
Dues and Memberships	5300	175,032.00		175,032.00
Insurance	5400	187,750.00		187,750.00
Operations and Housekeeping Services	5500	121,737.00		121,737.00
Rentals, Leases, Repairs, and Noncap. Improvements	5600	790,483.00	89,218.00	879,701.00
Transfers of Direct Costs	5700-5799			0.00
Professional/Consulting Services and Operating Expend.	5800	9,186,128.00	1,417,803.00	10,603,931.00
Communications	5900	1,098,732.00	0.00	1,098,732.00
Total, Services and Other Operating Expenditures		11,900,215.00	1,654,217.00	13,554,432.00
6. Capital Outlay				
(Objects 6100-6170, 6200-6500 modified accrual basis only)				
Land and Land Improvements	6100-6170			0.00
Buildings and Improvements of Buildings	6200			0.00
Books and Media for New School Libraries or Major Expansion of School Libraries	6300			0.00
Equipment	6400			0.00
Equipment Replacement	6500			0.00
Lease Assets	6600			0.00
Depreciation Expense (accrual basis only)	6900	162,967.00		162,967.00
Amortization Expense - Lease Assets	6910			0.00
Total, Capital Outlay		162,967.00	0.00	162,967.00
7. Other Outgo				
Tuition to Other Schools	7110-7143			0.00
Transfers of Pass-Through Revenues to Other LEAs	7211-7213			0.00
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE			0.00
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO			0.00
All Other Transfers	7281-7299			0.00
Transfers of Indirect Costs	7300-7399			0.00
Debt Service:				
Interest	7438			0.00
Principal (for modified accrual basis only)	7439			0.00
Total Debt Service		0.00	0.00	0.00
Total, Other Outgo		0.00	0.00	0.00
8. TOTAL EXPENDITURES		60,424,060.00	12,944,873.00	73,368,933.00

CHARTER SCHOOL JULY BUDGET

FINANCIAL REPORT -- ALTERNATIVE FORM

July 1, 2026 to June 30, 2027

Charter School Name: Sage Oak Charter School

CDS #: 36677360136069

Description	Object Code	Unrestricted	Restricted	Total
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)		3,244,552.00	(1,876,424.00)	1,368,128.00
D. OTHER FINANCING SOURCES / USES				
1. Other Sources	8930-8979			0.00
2. Less: Other Uses	7630-7699			0.00
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999	(1,876,424.00)	1,876,424.00	0.00
4. TOTAL OTHER FINANCING SOURCES / USES		(1,876,424.00)	1,876,424.00	0.00
E. NET INCREASE (DECREASE) IN FUND BALANCE /NET POSITION (C+D4)		1,368,128.00	0.00	1,368,128.00
F. FUND BALANCE / NET POSITION				
1. Beginning Fund Balance/Net Position				
a. As of July 1	9791	19,197,350.00		19,197,350.00
b. Adjustments/Restatements	9793, 9795			0.00
c. Adjusted Beginning Fund Balance /Net Position		19,197,350.00	0.00	19,197,350.00
2. Ending Fund Balance /Net Position, June 30 (E+F1c)		20,565,478.00	0.00	20,565,478.00
Components of Ending Fund Balance (Modified Accrual Basis only)				
a. Nonspendable				
1. Revolving Cash (equals Object 9130)	9711			0.00
2. Stores (equals Object 9320)	9712			0.00
3. Prepaid Expenditures (equals Object 9330)	9713			0.00
4. All Others	9719			0.00
b. Restricted	9740			0.00
c. Committed				
1. Stabilization Arrangements	9750			0.00
2. Other Commitments	9760			0.00
d. Assigned	9780			0.00
e. Unassigned/Unappropriated				
1. Reserve for Economic Uncertainties	9789			0.00
2. Unassigned/Unappropriated Amount	9790M			0.00
3. Components of Ending Net Position (Accrual Basis only)				
a. Net Investment in Capital Assets	9796	1,525,792.00	0.00	1,525,792.00
b. Restricted Net Position	9797			0.00
c. Unrestricted Net Position	9790A	19,039,686.00	0.00	19,039,686.00

CHARTER SCHOOL JULY BUDGET

FINANCIAL REPORT -- ALTERNATIVE FORM

July 1, 2026 to June 30, 2027

Charter School Name: Sage Oak Charter School

CDS #: 36677360136069

Description	Object Code	Unrestricted	Restricted	Total
G. ASSETS				
1. Cash				
In County Treasury	9110			0.00
Fair Value Adjustment to Cash in County Treasury	9111			0.00
In Banks	9120	16,354,251.00	2,843,099.00	19,197,350.00
In Revolving Fund	9130			0.00
With Fiscal Agent/Trustee	9135			0.00
Collections Awaiting Deposit	9140			0.00
2. Investments	9150			0.00
3. Accounts Receivable	9200	5,250,191.00	912,718.00	6,162,909.00
4. Due from Grantor Governments	9290			0.00
5. Stores	9320			0.00
6. Prepaid Expenditures (Expenses)	9330			0.00
7. Other Current Assets	9340			0.00
8. Lease Receivable	9380			0.00
9. Capital Assets (accrual basis only)	9400-9489	1,525,792.00		1,525,792.00
10. TOTAL ASSETS		23,130,234.00	3,755,817.00	26,886,051.00
H. DEFERRED OUTFLOWS OF RESOURCES				
1. Deferred Outflows of Resources	9490			0.00
2. TOTAL DEFERRED OUTFLOWS		0.00	0.00	0.00
I. LIABILITIES				
1. Accounts Payable	9500	2,564,756.00	(4,196.00)	2,560,560.00
2. Due to Grantor Governments	9590			0.00
3. Current Loans	9640			0.00
4. Unearned Revenue	9650			0.00
5. Long-Term Liabilities (accrual basis only)	9660-9669		3,760,013.00	3,760,013.00
6. TOTAL LIABILITIES		2,564,756.00	3,755,817.00	6,320,573.00
J. DEFERRED INFLOWS OF RESOURCES				
1. Deferred Inflows of Resources	9690			0.00
2. TOTAL DEFERRED INFLOWS		0.00	0.00	0.00
K. FUND BALANCE /NET POSITION				
Ending Fund Balance /Net Position, June 30 (G10 + H2) - (I6 + J2) (must agree with Line F2)		20,565,478.00	0.00	20,565,478.00

CHARTER SCHOOL JULY BUDGET

FINANCIAL REPORT -- ALTERNATIVE FORM

July 1, 2026 to June 30, 2027

Charter School Name: Sage Oak Charter School

CDS #: 36677360136069

L. FEDERAL EVERY STUDENT SUCCEEDS ACT (ESSA) MAINTENANCE OF EFFORT REQUIREMENT

NOTE: IF YOUR CHARTER SCHOOL RECEIVED FEDERAL FUNDING, AS REPORTED IN SECTION A2, THE FOLLOWING ADDITIONAL INFORMATION MUST BE PROVIDED IN ORDER FOR THE CDE TO CALCULATE COMPLIANCE WITH THE FEDERAL EVERY STUDENT SUCCEEDS ACT (ESSA) MAINTENANCE OF EFFORT REQUIREMENT:

1. Federal Revenue Used for Capital Outlay and Debt Service

Included in the Capital Outlay and Debt Service expenditures reported in sections B6 and B7 are the following amounts paid out of federal funds:

Federal Program Name (If no amounts, indicate "NONE")	Capital Outlay	Debt Service	Total
a.	$		0.00
b.			0.00
c.			0.00
d.			0.00
e.			0.00
f.			0.00
g.			0.00
h.			0.00
i.			0.00
j.			0.00
TOTAL FEDERAL REVENUES USED FOR CAPITAL OUTLAY AND DEBT SERVICE	0.00	0.00	0.00

2. Community Services Expenditures

Provide the amount of State and Local funds reported in Section B that were expended for Community Services Activities:

Objects of Expenditures		Amount (Enter "0.00" if none)
a. Certificated Salaries	1000-1999	
b. Noncertificated Salaries	2000-2999	
c. Employee Benefits	except 3801-	
d. Books and Supplies	4000-4999	
e. Services and Other Operating Expenditures	5000-5999	
TOTAL COMMUNITY SERVICES EXPENDITURES		0.00

3. Supplemental State and Local Expenditures resulting from a Presidentially Declared Disaster

Brief Description i.e., COVID-19 (If no amounts, indicate “None”)	Amount
a.	
b.	
c.	
d.	
TOTAL SUPPLEMENTAL EXPENDITURES (Should not be negative)	0.00

CHARTER SCHOOL JULY BUDGET
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2026 to June 30, 2027

Charter School Name: Sage Oak Charter School
CDS #: 36677360136069

4. State and Local Expenditures to be Used for ESSA Annual Maintenance of Effort Calculation:
Results of this calculation will be used for comparison with 2020-21 expenditures. Failure to maintain the required 90 percent expenditure level on either an aggregate or per capita expenditure basis may result in reduction to allocations for covered programs in 2023-24.

a. Total Expenditures (B8)	73,368,933.00
b. Less Federal Expenditures (Total A2) [Revenues are used as proxy for expenditures because most federal revenues are normally recognized in the period that qualifying expenditures are incurred]	1,385,601.00
c. Subtotal of State & Local Expenditures [a minus b]	71,983,332.00
d. Less Community Services [L2 Total]	0.00
e. Less Capital Outlay & Debt Service [Total B6 plus objects 7438 and 7439, less L1 Total, less objects 6600 and 6910]	162,967.00
f. Less Supplemental State and Local Expenditures resulting from a Presidentially Declared Disaster	0.00
TOTAL STATE & LOCAL EXPENDITURES SUBJECT TO MOE [c minus d minus e minus f]	$ 71,820,365.00

SAGE OAK
CHARTER SCHOOLS

Sage Oak Charter School - Keppel
2026-27 July Budget

Summary Analysis

Sage Oak Charter School - Keppel

Summary of Results

The 2026-27 July Budget projects a net revenue of $181K. The 2025-26 Estimated Actuals (EA) projects a net revenue of $264K. Positive net revenue and a strong reserve balance will allow Sage Oak Charter Schools to end the 2026-27 fiscal year with a reserve of $3.5M, which is 35.6% of annual expenditures.

Cash Flow

In the budgeted year's cash flow analysis, it was observed that the cash is projected to reach its lowest point at the end of February 2027, with $2.5M potential cash on hand. The cash reserve is deemed sufficient to sustain operations and safeguard against potential economic shocks.

Changes to Revenue

The 18.9% change in revenue from the 2025-26 EA to the 2026-27 July Budget is due to Local Control Funding Formula (LCFF), federal, and state revenues. Student average daily attendance (ADA) changed from 543 during the 2025-26 EA to 610 in the 2026-27 July.

Changes to Expenditures

Sage Oak-Keppel has an overall change of 20.6% in expenditures from the 2025-26 EA to the 2026-27 July Budget. The change is attributable to staffing, materials, and service costs associated with shifts in student enrollment.

Enrollment and ADA Assumptions

Sage Oak Charter School - Keppel

2026-27

	Enrollment	ADA	Unduplicated Pupil Percentage (UPP)
TK-3	305	303	
4-6	152	151	
7-8	74	73	
9-12	84	83	
Total	615	610	350
Growth	12.2 %	99.2 %	56.9 %

2027-28

	Enrollment	ADA	UPP
TK-3	330	327	
4-6	164	163	
7-8	80	79	
9-12	91	90	
Total	665	660	379
Growth	8.1 %	99.2 %	57.0 %

2028-29

	Enrollment	ADA	UPP
TK-3	355	352	
4-6	176	175	
7-8	86	85	
9-12	98	97	
Total	715	709	407
Growth	7.5 %	99.2 %	57.0 %

SAGE OAK CHARTER SCHOOLS

2026-27 JULY vs EA - Summary

Sage Oak Charter School - Keppel

	2026-27 July	2025-26 EA	$ Change	% Change
Revenue				
Total LCFF Revenues	8,306,778	7,059,562	1,247,216	17.7 %
Total Federal Revenue	169,088	170,565	(1,477)	(0.9) %
Total Other State Revenue	1,342,334	1,013,188	329,146	32.5 %
Total Local Revenue	73,316	73,316	0	0.0 %
Total Revenue	9,891,516	8,316,631	1,574,885	18.9 %
Expenditures				
Total 1000-1999 Certificated Salaries	3,902,661	3,135,135	767,526	24.5 %
Total 2000-2999 Classified Salaries	1,097,440	854,406	243,034	28.4 %
Total 3000-3999 Employee Benefits	1,874,035	1,459,702	414,333	28.4 %
Total 4100-4799 Books, Materials, & Supplies	1,025,556	969,250	56,306	5.8 %
Total 5100-5999 Services & Other Operating Expenditures	1,786,651	1,624,571	162,080	10.0 %
Total 6100-6999 Capital Outlay	23,870	9,331	14,539	155.8 %
Total Expenditures	9,710,213	8,052,395	1,657,818	20.6 %
Operating Income/(Loss)	181,303	264,236	(82,933)	(31.4) %
Net Assets				
9791 - Beginning Fund Balance	3,276,956	3,012,720	264,236	8.8 %
Total Net Assets	3,276,956	3,012,720	264,236	8.8 %
Change In Net Assets	181,303	264,236	(82,933)	(31.4) %
Total Net Assets	3,458,259	3,276,956	181,303	5.5 %

Net revenue as a % of expense	1.9 %	3.3 %
Fund balance as a % of expense	35.6 %	40.7 %
Days of Potential Cash	130	149

2026-27 JULY vs EA - Detail

Sage Oak Charter School - Keppel

	2026-27 July	2025-26 EA	$ Change	% Change	Notes
Revenue					
LCFF Revenue					
8011 - LCFF General Entitlement	7,301,918	6,048,879	1,253,039	20.7 %	
8012 - EPA Entitlement	122,090	108,660	13,430	12.4 %	
8019 - Prior Year Unrestricted Revenue	0	(4,811)	4,811	(100.0) %	
8096 - In-Lieu-Of Property Taxes	882,770	882,771	(1)	(0.0) %	
8097 - In-Lieu Property Taxes Prior Year	0	24,063	(24,063)	(100.0) %	
Total LCFF Revenues	8,306,778	7,059,562	1,247,216	17.7 %	The change is due to enrollment and ADA.
Federal Revenue					
8181 - Federal IDEA SpEd Revenue	63,525	68,485	(4,960)	(7.2) %	The change is due to the updated allocations from the SELPA.
8182 - SpEd - Discretionary Grants	4,688	4,635	53	1.1 %	
8290 - Other Federal Revenue	100,875	97,445	3,430	3.5 %	The change is due to the updated allocations from the California Department of Education (CDE).
Total Federal Revenue	169,088	170,565	(1,477)	(0.9) %	
Other State Revenue					
8311 - AB602 State SpEd Revenue	818,007	498,492	319,515	64.1 %	The change is due to enrollment and ADA.
8550 - Mandated Cost Reimbursements	14,374	11,307	3,067	27.1 %	
8560 - Lottery- Unrestricted	121,144	85,637	35,507	41.5 %	
8561 - Lottery- Prop 20 - Restricted	52,283	35,704	16,579	46.4 %	
8590 - Other State Revenue	336,526	382,048	(45,522)	(11.9) %	The change is due to recognizing the one-time AMIM grant.
Total Other State Revenue	1,342,334	1,013,188	329,146	32.5 %	The change is due to enrollment and ADA.
Local Revenue					
8660 - Interest Income	73,316	73,316	0	0.0 %	
Total Local Revenue	73,316	73,316	0	0.0 %	
Total Revenue	9,891,516	8,316,631	1,574,885	18.9 %	
Expenditures					
1000-1999 Certificated Salaries					
1100 Certificated Teachers Salaries	2,456,769	2,011,408	445,361	22.1 %	
1200 Certificated Pupil Support	985,084	703,628	281,456	40.0 %	
1300 Certificated Supervisors and Administrators Salaries	460,808	420,099	40,709	9.7 %	
Total 1000-1999 Certificated Salaries	3,902,661	3,135,135	767,526	24.5 %	The change is due to staffing needs aligned with student enrollment.
2000-2999 Classified Salaries					
2100 Classified Instructional Salaries	163,482	118,749	44,733	37.7 %	
2300 Classified Supervisors and Admin Salaries	448,272	391,848	56,424	14.4 %	
2400 Clerical, Technical and Office Salaries	485,686	343,809	141,877	41.3 %	
Total 2000-2999 Classified Salaries	1,097,440	854,406	243,034	28.4 %	The change is due to staffing needs aligned with student enrollment.
3000-3999 Employee Benefits					
3101-3102 STRS					
3101 - STRS Certificated	743,389	597,129	146,260	24.5 %	
Total 3101-3102 STRS	743,389	597,129	146,260	24.5 %	The change is due to staffing needs aligned with student enrollment.
3301-3302 OASDI/Medicare/Alternative					
3313 - Medicare - Certificated	58,436	46,704	11,732	25.1 %	
3314 - Medicare - Classified	16,295	12,547	3,748	29.9 %	
3355 - OASDI - Certificated	0	2,074	(2,074)	(100.0) %	The change is due to the projected number of staff contributing to Social Security Taxes.
3356 - OASDI - Classified	69,679	53,422	16,257	30.4 %	
Total 3301-3302 OASDI/Medicare/Alternative	144,410	114,747	29,663	25.9 %	The change is due to staffing needs aligned with student enrollment.
3401-3402 Health and Welfare Benefits					
3401 - Health Care Certificated	477,815	391,472	86,343	22.1 %	
3402 - Health Care Classified	171,045	135,220	35,825	26.5 %	
Total 3401-3402 Health and Welfare Benefits	648,860	526,692	122,168	23.2 %	The change is due to staffing needs aligned with student enrollment.
3501-3502 Unemployment Insurance					
3501 - Unemployment Insurance Certificated	9,291	9,328	(37)	(0.4) %	
3502 - Unemployment Insurance Classified	4,335	4,698	(363)	(7.7) %	
Total 3501-3502 Unemployment Insurance	13,626	14,026	(400)	(2.9) %	

2026-27 JULY vs EA - Detail

Sage Oak Charter School - Keppel

	2026-27 July	2025-26 EA	$ Change	% Change	Notes
3601-3602 Workers' Compensation					
3601 - Workers' Comp Certificated	19,142	11,529	7,613	66.0 %	
3602 - Workers' Comp Classified	5,338	3,093	2,245	72.6 %	
Total 3601-3602 Workers' Compensation	24,480	14,622	9,858	67.4 %	The change is due to staffing needs aligned with student enrollment.
3901-3922 Other Employee Benefits					
3901 - Other Benefits Cert	153,316	116,000	37,316	32.2 %	
3902 - Other Benefits Class	36,542	23,188	13,354	57.6 %	
3922 - 457b Employer match-Classified	109,412	53,298	56,114	105.3 %	
Total 3901-3922 Other Employee Benefits	299,270	192,486	106,784	55.5 %	The change is due to staffing needs aligned with student enrollment.
Total 3000-3999 Employee Benefits	1,874,035	1,459,702	414,333	28.4 %	
4100-4799 Books, Materials, & Supplies					
4200 Books and Other Reference Materials					
4200 - Other Reference Materials	135,124	62,303	72,821	116.9 %	
Total 4200 Books and Other Reference Materials	135,124	62,303	72,821	116.9 %	The change is due to coding alignment for Sage Crates curriculum.
4300 Materials and Supplies					
4310 - Materials & Supplies	72,462	66,273	6,189	9.3 %	The change is due to materials and supplies for students based on enrollment.
4320 - Office Supplies	34,827	18,402	16,425	89.3 %	The change is due to upgrading staff MiFi devices.
4330 - Events	3,937	2,036	1,901	93.4 %	The change is due to planned activities for students.
4350 - Other Supplies - Materials & Supplies	1,925	1,579	346	21.9 %	The change is due to graduation supplies.
4381 - Instructional Funds - Materials	644,654	571,004	73,650	12.9 %	The change is due to enrollment and the Instructional Funds (IF) rate.
Total 4300 Materials and Supplies	757,805	659,294	98,511	14.9 %	
4400 Noncapitalized Equipment					
4400 - Non-Capitalized Equipment	132,627	247,653	(115,026)	(46.4) %	The change is due to planned student Chromebook replacements.
Total 4400 Noncapitalized Equipment	132,627	247,653	(115,026)	(46.4) %	
Total 4100-4799 Books, Materials, & Supplies	1,025,556	969,250	56,306	5.8 %	
5100-5999 Services & Other Operating Expenditures					
5100 Subagreements for Services					
5100 - SpEd Consultants and Vendors Subagreements for Service	21,560	63,966	(42,406)	(66.3) %	
Total 5100 Subagreements for Services	21,560	63,966	(42,406)	(66.3) %	The change is due to employee recruitment in place of external consultants.
5200 Travel and Conferences					
5210 - Mileage Reimbursements	2,706	2,481	225	9.1 %	
5220 - Travel & Lodging	47,146	39,753	7,393	18.6 %	The change is due to staff attendance at professional development conferences.
Total 5200 Travel and Conferences	49,852	42,234	7,618	18.0 %	
5300 Dues and Memberships					
5300 - Dues & Memberships	25,637	18,510	7,127	38.5 %	
Total 5300 Dues and Memberships	25,637	18,510	7,127	38.5 %	The change is due to membership fees based on student enrollment.
5400 Insurance					
5400 - Insurance	27,500	25,606	1,894	7.4 %	
Total 5400 Insurance	27,500	25,606	1,894	7.4 %	The change is due to estimated contract costs for the year.
5500 Operations and Housekeeping Services					
5510 - Utilities (General)	17,831	18,425	(594)	(3.2) %	
Total 5500 Operations and Housekeeping Services	17,831	18,425	(594)	(3.2) %	
5600 Rents, Leases, Repairs, and Noncap. Improvements					
5610 - Facility Rents & Leases	115,013	114,701	312	0.3 %	
5612 - Testing Site	13,200	9,988	3,212	32.2 %	The change is due to Special Education assessment site rentals.
5620 - Equipment Leases	638	609	29	4.8 %	
Total 5600 Rents, Leases, Repairs, and Noncap. Improvements	128,851	125,298	3,553	2.8 %	

2026-27 JULY vs EA - Detail

Sage Oak Charter School - Keppel

	2026-27 July	2025-26 EA	$ Change	% Change	Notes
5800 Professional/Consulting Services and Operating Expend.					
5800 - Professional Services - Non-instructional	33,611	29,981	3,630	12.1 %	The change is due to marketing consultant services supporting data systems.
5810 - Legal	31,856	30,456	1,400	4.6 %	
5820 - Audit & CPA	7,150	7,771	(621)	(8.0) %	
5835 - Field Trips	15,565	13,055	2,510	19.2 %	The change is due to student field trips.
5840 - Advertising & Recruitment	9,273	12,970	(3,697)	(28.5) %	The change is due to advertising expenses supporting marketing and recruitment.
5850 - Oversight Fees	81,710	70,403	11,307	16.1 %	The change is due to enrollment.
5860 - Service Fees	51,702	48,389	3,313	6.8 %	The change is due to service fees for the Human Resources (HR) management system.
5863 - Professional Development	183,960	67,327	116,633	173.2 %	The change is due to professional development opportunities for teachers and staff.
5870 - Livescan Fingerprinting	83	122	(39)	(32.0) %	The change is due to the number of Livescan reimbursements.
5877 - Lending Library	1,397	25,889	(24,492)	(94.6) %	The change is due to coding alignment for Sage Crates curriculum.
5878 - Student Assessment	4,345	3,898	447	11.5 %	The change is due to the updated quote for the i-Ready assessment.
5880 - Instructional Vendors & Consultants	7,491	23,752	(16,261)	(68.5) %	The change is due to continued student conferences aligned with participation requirements.
5881 - Instructional Funds - Services	787,909	697,893	90,016	12.9 %	The change is due to enrollment and the IF rate.
5883 - Outside Consultant and Services	4,719	1,663	3,056	183.8 %	The change is due to contracting an outside consultant to update job descriptions.
5887 - Student Service Technology	133,716	111,213	22,503	20.2 %	The change is due to additional technology programs for students and staff.
Total 5800 Professional/Consulting Services and Operating Expend.	1,354,487	1,144,782	209,705	18.3 %	
5900 Communications					
5930 - Postage	16,115	15,352	763	5.0 %	
5940 - Technology Services	144,818	170,398	(25,580)	(15.0) %	The change is due to coding alignment for IT projects.
Total 5900 Communications	160,933	185,750	(24,817)	(13.4) %	
Total 5100-5999 Services & Other Operating Expenditures	1,786,651	1,624,571	162,080	10.0 %	
6100-6999 Capital Outlay					
Capital Expenditures					
6901 - Depreciation Expense-Leasehold Improvements	23,870	9,331	14,539	155.8 %	
Total Capital Expenditures	23,870	9,331	14,539	155.8 %	The change is due to depreciation on capitalized equipment and leasehold improvements.
Total 6100-6999 Capital Outlay	23,870	9,331	14,539	155.8 %	
Total Expenditures	9,710,213	8,052,395	1,657,818	20.6 %	
Operating Income/(Loss)	181,303	264,236	(82,933)	(31.4) %	
Net Assets					
9791 - Beginning Fund Balance	3,276,956	3,012,720	264,236	8.8 %	
Total Net Assets	3,276,956	3,012,720	264,236	8.8 %	
Change In Net Assets	181,303	264,236	(82,933)	(31.4) %	
Total Net Assets	3,458,259	3,276,956	181,303	5.5 %	

Net revenue as a % of expense	1.9 %	3.3 %
Fund balance as a % of expense	35.6 %	40.7 %
Days of Potential Cash	130	149

SAGE OAK CHARTER SCHOOLS

2026-27 JULY vs EA - MYP Summary

Sage Oak Charter School - Keppel

Enrollment	615	665	715
ADA	610	660	709
COLA	2.87 %	3.06 %	3.34 %

	2026-27 July	2027-28	2028-29
Revenue			
Total LCFF Revenues	8,306,778	9,366,461	10,406,943
Total Federal Revenue	169,088	169,088	169,088
Total Other State Revenue	1,342,334	1,361,774	1,414,364
Total Local Revenue	73,316	73,316	73,316
Total Revenue	9,891,516	10,970,639	12,063,711
Expenditures			
Total 1000-1999 Certificated Salaries	3,902,661	4,286,956	4,790,498
Total 2000-2999 Classified Salaries	1,097,440	1,224,111	1,394,244
Total 3000-3999 Employee Benefits	1,874,035	2,106,805	2,338,767
Total 4100-4799 Books, Materials, & Supplies	1,025,556	1,087,436	1,057,690
Total 5100-5999 Services & Other Operating Expenditures	1,786,651	1,892,490	1,838,146
Total 6100-6999 Capital Outlay	23,870	25,097	22,769
Total Expenditures	9,710,213	10,622,895	11,442,114
Operating Income/(Loss)	181,303	347,744	621,597
Net Assets			
9791 - Beginning Fund Balance	3,276,956	3,458,259	3,806,003
Total Net Assets	3,276,956	3,458,259	3,806,003
Change In Net Assets	181,303	347,744	621,597
Total Net Assets	3,458,259	3,806,003	4,427,600

Net revenue as a % of expense	1.9 %	3.3 %	5.4 %
Fund balance as a % of expense	35.6 %	35.8 %	38.7 %
Days of Potential Cash	130	131	141

SAGE OAK CHARTER SCHOOLS

2026-27 JULY vs EA - MYP Detail

Sage Oak Charter School - Keppel

	2026-27 July	2027-28	2028-29
Revenue			
LCFF Revenue			
8011 - LCFF General Entitlement	7,301,918	8,351,753	9,382,316
8012 - EPA Entitlement	122,090	131,938	141,857
8096 - In-Lieu-Of Property Taxes	882,770	882,770	882,770
Total LCFF Revenues	8,306,778	9,366,461	10,406,943
Federal Revenue			
8181 - Federal IDEA SpEd Revenue	63,525	63,525	63,525
8182 - SpEd - Discretionary Grants	4,688	4,688	4,688
8290 - Other Federal Revenue	100,875	100,875	100,875
Total Federal Revenue	169,088	169,088	169,088
Other State Revenue			
8311 - AB602 State SpEd Revenue	818,007	911,020	1,012,234
8550 - Mandated Cost Reimbursements	14,374	16,693	18,641
8560 - Lottery- Unrestricted	121,144	130,912	140,755
8561 - Lottery- Prop 20 - Restricted	52,283	56,499	60,747
8590 - Other State Revenue	336,526	246,650	181,987
Total Other State Revenue	1,342,334	1,361,774	1,414,364
Local Revenue			
8660 - Interest Income	73,316	73,316	73,316
Total Local Revenue	73,316	73,316	73,316
Total Revenue	9,891,516	10,970,639	12,063,711
Expenditures			
1000-1999 Certificated Salaries			
1100 Certificated Teachers Salaries	2,456,769	2,775,998	3,211,547
1200 Certificated Pupil Support	985,084	1,029,414	1,075,738
1300 Certificated Supervisors and Administrators Salaries	460,808	481,544	503,213
Total 1000-1999 Certificated Salaries	3,902,661	4,286,956	4,790,498
2000-2999 Classified Salaries			
2100 Classified Instructional Salaries	163,482	170,839	178,527
2300 Classified Supervisors and Admin Salaries	448,272	468,444	489,524
2400 Clerical, Technical and Office Salaries	485,686	584,828	726,193
Total 2000-2999 Classified Salaries	1,097,440	1,224,111	1,394,244
3000-3999 Employee Benefits			
3101-3102 STRS			
3101 - STRS Certificated	743,389	825,332	938,020
Total 3101-3102 STRS	743,389	825,332	938,020

2026-27 JULY vs EA - MYP Detail

Sage Oak Charter School - Keppel

	2026-27 July	2027-28	2028-29
3301-3302 OASDI/Medicare/Alternative			
3313 - Medicare - Certificated	58,436	64,864	71,999
3314 - Medicare - Classified	16,295	18,089	20,079
3356 - OASDI - Classified	69,679	72,815	76,092
Total 3301-3302 OASDI/Medicare/Alternative	144,410	155,768	168,170
3401-3402 Health and Welfare Benefits			
3401 - Health Care Certificated	477,815	530,375	588,716
3402 - Health Care Classified	171,045	182,163	194,004
Total 3401-3402 Health and Welfare Benefits	648,860	712,538	782,720
3501-3502 Unemployment Insurance			
3501 - Unemployment Insurance Certificated	9,291	9,711	10,343
3502 - Unemployment Insurance Classified	4,335	4,531	5,028
Total 3501-3502 Unemployment Insurance	13,626	14,242	15,371
3601-3602 Workers' Compensation			
3601 - Workers' Comp Certificated	19,142	20,674	21,604
3602 - Workers' Comp Classified	5,338	5,765	6,024
Total 3601-3602 Workers' Compensation	24,480	26,439	27,628
3901-3922 Other Employee Benefits			
3901 - Other Benefits Cert	153,316	202,176	214,220
3902 - Other Benefits Class	36,542	47,388	51,401
3922 - 457b Employer match-Classified	109,412	122,922	141,237
Total 3901-3922 Other Employee Benefits	299,270	372,486	406,858
Total 3000-3999 Employee Benefits	1,874,035	2,106,805	2,338,767
4100-4799 Books, Materials, & Supplies			
4200 Books and Other Reference Materials			
4200 - Other Reference Materials	135,124	142,713	134,521
Total 4200 Books and Other Reference Materials	135,124	142,713	134,521
4300 Materials and Supplies			
4310 - Materials & Supplies	72,462	72,872	68,056
4320 - Office Supplies	34,827	26,784	25,216
4330 - Events	3,937	4,085	3,807
4350 - Other Supplies - Materials & Supplies	1,925	1,998	1,863
4381 - Instructional Funds - Materials	644,654	703,819	698,045
Total 4300 Materials and Supplies	757,805	809,558	796,987
4400 Noncapitalized Equipment			
4400 - Non-Capitalized Equipment	132,627	135,165	126,182
Total 4400 Noncapitalized Equipment	132,627	135,165	126,182
Total 4100-4799 Books, Materials, & Supplies	1,025,556	1,087,436	1,057,690

2026-27 JULY vs EA - MYP Detail

Sage Oak Charter School - Keppel

	2026-27 July	2027-28	2028-29
5100-5999 Services & Other Operating Expenditures			
5100 Subagreements for Services			
5100 - SpEd Consultants and Vendors Subagreements for Service	21,560	23,876	23,464
Total 5100 Subagreements for Services	21,560	23,876	23,464
5200 Travel and Conferences			
5210 - Mileage Reimbursements	2,706	3,053	2,850
5220 - Travel & Lodging	47,146	52,237	48,761
Total 5200 Travel and Conferences	49,852	55,290	51,611
5300 Dues and Memberships			
5300 - Dues & Memberships	25,637	19,847	18,494
Total 5300 Dues and Memberships	25,637	19,847	18,494
5400 Insurance			
5400 - Insurance	27,500	19,170	21,392
Total 5400 Insurance	27,500	19,170	21,392
5500 Operations and Housekeeping Services			
5510 - Utilities (General)	17,831	15,529	14,894
Total 5500 Operations and Housekeeping Services	17,831	15,529	14,894
5600 Rents, Leases, Repairs, and Noncap. Improvements			
5610 - Facility Rents & Leases	115,013	116,247	105,636
5612 - Testing Site	13,200	14,419	14,199
5620 - Equipment Leases	638	666	624
Total 5600 Rents, Leases, Repairs, and Noncap. Improvements	128,851	131,332	120,459
5800 Professional/Consulting Services and Operating Expend.			
5800 - Professional Services - Non-instructional	33,611	37,296	34,169
5810 - Legal	31,856	33,034	30,836
5820 - Audit & CPA	7,150	7,071	6,596
5835 - Field Trips	15,565	15,856	14,894
5840 - Advertising & Recruitment	9,273	9,513	8,751
5850 - Oversight Fees	81,710	93,665	104,069
5860 - Service Fees	51,702	53,591	50,030
5863 - Professional Development	183,960	189,080	174,996
5870 - Livescan Fingerprinting	83	410	459
5877 - Lending Library	1,397	1,487	1,420
5878 - Student Assessment	4,345	4,507	4,209
5880 - Instructional Vendors & Consultants	7,491	7,570	6,878
5881 - Instructional Funds - Services	787,909	860,223	853,166
5883 - Outside Consultant and Services	4,719	4,895	4,572
5887 - Student Service Technology	133,716	143,532	136,030
Total 5800 Professional/Consulting Services and Operating Expend.	1,354,487	1,461,730	1,431,075

2026-27 JULY vs EA - MYP Detail

Sage Oak Charter School - Keppel

	2026-27 July	2027-28	2028-29
5900 Communications			
5930 - Postage	16,115	16,717	15,609
5940 - Technology Services	144,818	148,999	141,148
Total 5900 Communications	160,933	165,716	156,757
Total 5100-5999 Services & Other Operating Expenditures	1,786,651	1,892,490	1,838,146
6100-6999 Capital Outlay			
Capital Expenditures			
6901 - Depreciation Expense-Leasehold Improvements	23,870	25,097	22,769
Total Capital Expenditures	23,870	25,097	22,769
Total 6100-6999 Capital Outlay	23,870	25,097	22,769
Total Expenditures	9,710,213	10,622,895	11,442,114
Operating Income/(Loss)	181,303	347,744	621,597
Net Assets			
9791 - Beginning Fund Balance	3,276,956	3,458,259	3,806,003
Total Net Assets	3,276,956	3,458,259	3,806,003
Change In Net Assets	181,303	347,744	621,597
Total Net Assets	3,458,259	3,806,003	4,427,600

Net revenue as a % of expense	1.9 %	3.3 %	5.4 %
Fund balance as a % of expense	35.6 %	35.8 %	38.7 %
Days of Potential Cash	130	131	141

SAGE OAK CHARTER SCHOOLS

2026-27 JULY vs EA
Cash Flow Statement 2026-27
Sage Oak Charter School - Keppel

	Year Ending 06/30/2027	Month Ending 07/31/2026	Month Ending 08/31/2026	Month Ending 09/30/2026	Month Ending 10/31/2026	Month Ending 11/30/2026	Month Ending 12/31/2026	Month Ending 01/31/2027	Month Ending 02/28/2027	Month Ending 03/31/2027	Month Ending 04/30/2027	Month Ending 05/31/2027	Month Ending 06/30/2027		
	2026-27 July	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Total	Variance
Cash Balance															
Beginning Cash	3,276,956	3,276,956	3,494,901	3,004,200	2,939,019	2,897,000	2,769,573	2,762,270	2,724,155	2,474,920	2,911,820	3,128,330	3,188,844		
Net Cash for Period															
REVENUES	9,891,516	397,942	392,500	809,398	682,508	678,315	765,742	762,502	1,011,978	1,190,757	1,015,107	1,025,857	1,158,910	9,891,516	0
EXPENDITURES	9,710,213	619,790	751,424	769,929	735,774	800,710	821,134	778,597	833,844	816,546	837,916	940,797	1,003,752	9,710,213	0
Net Cash for Period	181,303	(221,848)	(358,924)	39,469	(53,266)	(122,395)	(55,392)	(16,095)	178,134	374,211	177,191	85,060	155,158	181,303	0
Accounts Receivable	599,182	(446,990)	11,384	88,080	(13,122)	(2,756)	(111,088)	22,889	538,185	(29,420)	(14,800)	57,821	498,999	599,182	0
Other Assets	294,988	4,867	177		413	885	2,950	7,434	26,903	8,319	1,032	7,463	234,545	294,988	0
Accounts Payable	97,356	(10,016)	(65,692)	17,218	15,272	(6,903)	(28,824)	23,035	(953)	37,344	25,551	(53,178)	144,502	97,356	0
Deferred Revenue/Prepaid Expenses	796,814	7,686	(54,524)	(33,788)	(16,734)		(31,225)	(14,732)	138,672	4,244		93,916	703,299	796,814	0
Cash at End of Period	3,458,259	3,494,901	3,004,200	2,939,019	2,897,000	2,769,573	2,762,270	2,724,155	2,474,920	2,911,820	3,128,330	3,188,844	3,458,259		
Days of Potential Cash	130	131	113	110	109	104	104	102	93	109	118	120	130		

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2026-27 JULY vs EA
Cash Flow Statement 2027-28
Sage Oak Charter School - Keppel

	Year Ending 06/30/2028	Month Ending 07/31/2027	Month Ending 08/31/2027	Month Ending 09/30/2027	Month Ending 10/31/2027	Month Ending 11/30/2027	Month Ending 12/31/2027	Month Ending 01/31/2028	Month Ending 02/29/2028	Month Ending 03/31/2028	Month Ending 04/30/2028	Month Ending 05/31/2028	Month Ending 06/30/2028		
	2026-27 July	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Total	Variance
Cash Balance															
Beginning Cash	3,458,259	3,458,259	3,452,696	3,191,729	2,842,847	2,788,322	2,866,790	2,895,677	2,959,862	2,574,691	2,910,129	3,170,069	2,993,923		
Net Cash for Period															
REVENUES	10,970,639	(16,456)	485,999	682,374	794,274	821,701	862,292	888,622	769,042	1,178,247	1,199,091	1,047,696	2,257,757	10,970,639	0
EXPENDITURES	10,622,895	374,988	680,928	921,005	842,396	744,665	893,385	781,845	807,340	863,641	950,749	1,263,062	1,498,890	10,622,895	0
Net Cash for Period	347,744	(391,444)	(194,928)	(238,631)	(48,121)	77,036	(31,093)	106,777	(38,298)	314,605	248,342	(215,366)	758,867	347,744	0
Accounts Receivable	823,727	(377,974)	9,943	75,489	(10,812)	(1,432)	(92,106)	27,434	489,542	(16,467)	(11,598)	57,404	674,304	823,727	0
Accounts Payable	92,427	887	(6,294)	(3,900)	(1,932)		(3,605)	(1,701)	16,008	490		10,842	81,632	92,427	0
Deferred Revenue/Prepaid Expenses	731,300	7,020	(49,802)	(30,861)	(15,284)		(28,521)	(13,456)	126,661	3,876		85,782	645,885	731,300	0
Cash at End of Period	3,806,003	3,452,696	3,191,729	2,842,847	2,788,322	2,866,790	2,895,677	2,959,862	2,574,691	2,910,129	3,170,069	2,993,923	3,806,003		
Days of Potential Cash	131	119	110	98	96	99	99	102	88	100	109	103	131		

Powered by BoardOnTrack

CHARTER SCHOOL JULY BUDGET

FINANCIAL REPORT -- ALTERNATIVE FORM

July 1, 2026 to June 30, 2027

Charter School Name: Sage Oak Charter School - Keppel

CDS #: 19646420136127

Charter Approving Entity: Keppel Union School District

County: Los Angeles

Charter #: 1886

This charter school uses the following basis of accounting:

(Please enter an "X" in the applicable box below; check only one box)

[X] **Accrual Basis** (Applicable Capital Assets/Interest on Long-Term Debt/Long-Term Liabilities/Net Position objects are 6900, 6910, 7438, 9400-9489, 9660-9669, 9796, and 9797)

[ ] **Modified Accrual Basis** (Applicable Capital Outlay/Debt Service/Fund Balance objects are 6100-6170, 6200-6500, 6600, 7438, 7439, and 9711-9789)

Description	Object Code	Unrestricted	Restricted	Total
A. REVENUES				
1. LCFF Sources				
State Aid - Current Year	8011	7,301,918.00		7,301,918.00
Education Protection Account State Aid - Current Year	8012	122,090.00		122,090.00
State Aid - Prior Years	8019			0.00
Transfers to Charter Schools in Lieu of Property Taxes	8096	882,770.00		882,770.00
Other LCFF Transfers	8091, 8097			0.00
Total, LCFF Sources		8,306,778.00	0.00	8,306,778.00
2. Federal Revenues (see NOTE in Section L)				
No Child Left Behind/Every Student Succeeds Act	8290			0.00
Special Education - Federal	8181, 8182		63,525.00	63,525.00
Child Nutrition - Federal	8220			0.00
Donated Food Commodities	8221			0.00
Other Federal Revenues	8110, 8260-8299		105,563.00	105,563.00
Total, Federal Revenues		0.00	169,088.00	169,088.00
3. Other State Revenues				
Special Education - State	StateRevSE		818,007.00	818,007.00
All Other State Revenues	StateRevAO	135,518.00	388,809.00	524,327.00
Total, Other State Revenues		135,518.00	1,206,816.00	1,342,334.00
4. Other Local Revenues				
All Other Local Revenues	LocalRevAO	73,316.00		73,316.00
Total, Local Revenues		73,316.00	0.00	73,316.00
5. TOTAL REVENUES		8,515,612.00	1,375,904.00	9,891,516.00
B. EXPENDITURES (see NOTE in Section L)				
1. Certificated Salaries				
Certificated Teachers' Salaries	1100	2,106,138.00	350,631.00	2,456,769.00
Certificated Pupil Support Salaries	1200	489,061.00	496,023.00	985,084.00
Certificated Supervisors' and Administrators' Salaries	1300	418,198.00	42,610.00	460,808.00
Other Certificated Salaries	1900			0.00
Total, Certificated Salaries		3,013,397.00	889,264.00	3,902,661.00
2. Noncertificated Salaries				
Noncertificated Instructional Salaries	2100	77,801.00	85,681.00	163,482.00
Noncertificated Support Salaries	2200			0.00
Noncertificated Supervisors' and Administrators' Salaries	2300	426,925.00	21,347.00	448,272.00
Clerical, Technical and Office Salaries	2400	468,755.00	16,931.00	485,686.00
Other Noncertificated Salaries	2900			0.00
Total, Noncertificated Salaries		973,481.00	123,959.00	1,097,440.00

CHARTER SCHOOL JULY BUDGET

FINANCIAL REPORT -- ALTERNATIVE FORM

July 1, 2026 to June 30, 2027

Charter School Name: Sage Oak Charter School - Keppel

CDS #: 19646420136127

Description	Object Code	Unrestricted	Restricted	Total
3. Employee Benefits				
STRS	3101-3102	589,977.00	153,412.00	743,389.00
PERS	3201-3202			0.00
OASDI / Medicare / Alternative	3301-3302	122,547.00	21,863.00	144,410.00
Health and Welfare Benefits	3401-3402	534,823.00	114,037.00	648,860.00
Unemployment Insurance	3501-3502	10,799.00	2,827.00	13,626.00
Workers' Compensation Insurance	3601-3602	19,935.00	4,545.00	24,480.00
OPEB, Allocated	3701-3702			0.00
OPEB, Active Employees	3751-3752			0.00
Other Employee Benefits	3901-3902	250,182.00	49,088.00	299,270.00
Total, Employee Benefits		1,528,263.00	345,772.00	1,874,035.00
4. Books and Supplies				
Approved Textbooks and Core Curricula Materials	4100			0.00
Books and Other Reference Materials	4200	125,124.00	10,000.00	135,124.00
Materials and Supplies	4300	716,247.00	41,558.00	757,805.00
Noncapitalized Equipment	4400	132,627.00	0.00	132,627.00
Food	4700			0.00
Total, Books and Supplies		973,998.00	51,558.00	1,025,556.00
5. Services and Other Operating Expenditures				
Subagreements for Services	5100		21,560.00	21,560.00
Travel and Conferences	5200	49,852.00		49,852.00
Dues and Memberships	5300	25,637.00		25,637.00
Insurance	5400	27,500.00		27,500.00
Operations and Housekeeping Services	5500	17,831.00		17,831.00
Rentals, Leases, Repairs, and Noncap. Improvements	5600	115,783.00	13,068.00	128,851.00
Transfers of Direct Costs	5700-5799			0.00
Professional/Consulting Services and Operating Expend.	5800	1,185,651.00	168,836.00	1,354,487.00
Communications	5900	160,933.00		160,933.00
Total, Services and Other Operating Expenditures		1,583,187.00	203,464.00	1,786,651.00
6. Capital Outlay				
(Objects 6100-6170, 6200-6500 modified accrual basis only)				
Land and Land Improvements	6100-6170			0.00
Buildings and Improvements of Buildings	6200			0.00
Books and Media for New School Libraries or Major Expansion of School Libraries	6300			0.00
Equipment	6400			0.00
Equipment Replacement	6500			0.00
Lease Assets	6600			0.00
Depreciation Expense (accrual basis only)	6900	23,870.00		23,870.00
Amortization Expense - Lease Assets	6910			0.00
Total, Capital Outlay		23,870.00	0.00	23,870.00
7. Other Outgo				
Tuition to Other Schools	7110-7143			0.00
Transfers of Pass-Through Revenues to Other LEAs	7211-7213			0.00
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE			0.00
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO			0.00
All Other Transfers	7281-7299			0.00
Transfers of Indirect Costs	7300-7399			0.00
Debt Service:				
Interest	7438			0.00
Principal (for modified accrual basis only)	7439			0.00
Total Debt Service		0.00	0.00	0.00
Total, Other Outgo		0.00	0.00	0.00
8. TOTAL EXPENDITURES		8,096,196.00	1,614,017.00	9,710,213.00

CHARTER SCHOOL JULY BUDGET

FINANCIAL REPORT -- ALTERNATIVE FORM

July 1, 2026 to June 30, 2027

Charter School Name: Sage Oak Charter School - Keppel

CDS #: 19646420136127

Description	Object Code	Unrestricted	Restricted	Total
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)		419,416.00	(238,113.00)	181,303.00
D. OTHER FINANCING SOURCES / USES				
1. Other Sources	8930-8979			0.00
2. Less: Other Uses	7630-7699			0.00
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999	(238,113.00)	238,113.00	0.00
4. TOTAL OTHER FINANCING SOURCES / USES		(238,113.00)	238,113.00	0.00
E. NET INCREASE (DECREASE) IN FUND BALANCE /NET POSITION (C+D4)		181,303.00	0.00	181,303.00
F. FUND BALANCE / NET POSITION				
1. Beginning Fund Balance/Net Position				
a. As of July 1	9791	3,276,956.00		3,276,956.00
b. Adjustments/Restatements	9793, 9795			0.00
c. Adjusted Beginning Fund Balance /Net Position		3,276,956.00	0.00	3,276,956.00
2. Ending Fund Balance /Net Position, June 30 (E+F1c)		3,458,259.00	0.00	3,458,259.00
Components of Ending Fund Balance (Modified Accrual Basis only)				
a. Nonspendable				
1. Revolving Cash (equals Object 9130)	9711			0.00
2. Stores (equals Object 9320)	9712			0.00
3. Prepaid Expenditures (equals Object 9330)	9713			0.00
4. All Others	9719			0.00
b. Restricted	9740			0.00
c. Committed				
1. Stabilization Arrangements	9750			0.00
2. Other Commitments	9760			0.00
d. Assigned	9780			0.00
e. Unassigned/Unappropriated				
1. Reserve for Economic Uncertainties	9789			0.00
2. Unassigned/Unappropriated Amount	9790M			0.00
3. Components of Ending Net Position (Accrual Basis only)				
a. Net Investment in Capital Assets	9796	294,988.00	0.00	294,988.00
b. Restricted Net Position	9797			0.00
c. Unrestricted Net Position	9790A	3,163,271.00	0.00	3,163,271.00

CHARTER SCHOOL JULY BUDGET

FINANCIAL REPORT -- ALTERNATIVE FORM

July 1, 2026 to June 30, 2027

Charter School Name: Sage Oak Charter School - Keppel

CDS #: 19646420136127

Description	Object Code	Unrestricted	Restricted	Total
G. ASSETS				
1. Cash				
In County Treasury	9110			0.00
Fair Value Adjustment to Cash in County Treasury	9111			0.00
In Banks	9120	2,821,133.00	455,823.00	3,276,956.00
In Revolving Fund	9130			0.00
With Fiscal Agent/Trustee	9135			0.00
Collections Awaiting Deposit	9140			0.00
2. Investments	9150			0.00
3. Accounts Receivable	9200	671,920.00	108,565.00	780,485.00
4. Due from Grantor Governments	9290			0.00
5. Stores	9320			0.00
6. Prepaid Expenditures (Expenses)	9330	0.00	0.00	0.00
7. Other Current Assets	9340			0.00
8. Lease Receivable	9380			0.00
9. Capital Assets (accrual basis only)	9400-9489	294,988.00		294,988.00
10. TOTAL ASSETS		3,788,041.00	564,388.00	4,352,429.00
H. DEFERRED OUTFLOWS OF RESOURCES				
1. Deferred Outflows of Resources	9490			0.00
2. TOTAL DEFERRED OUTFLOWS		0.00	0.00	0.00
I. LIABILITIES				
1. Accounts Payable	9500	329,782.00	(232,426.00)	97,356.00
2. Due to Grantor Governments	9590			0.00
3. Current Loans	9640			0.00
4. Unearned Revenue	9650			0.00
5. Long-Term Liabilities (accrual basis only)	9660-9669		796,814.00	796,814.00
6. TOTAL LIABILITIES		329,782.00	564,388.00	894,170.00
J. DEFERRED INFLOWS OF RESOURCES				
1. Deferred Inflows of Resources	9690			0.00
2. TOTAL DEFERRED INFLOWS		0.00	0.00	0.00
K. FUND BALANCE /NET POSITION				
Ending Fund Balance /Net Position, June 30 (G10 + H2) - (I6 + J2) (must agree with Line F2)		3,458,259.00	0.00	3,458,259.00

CHARTER SCHOOL JULY BUDGET

FINANCIAL REPORT -- ALTERNATIVE FORM

July 1, 2026 to June 30, 2027

Charter School Name: Sage Oak Charter School - Keppel

CDS #: 19646420136127

L. FEDERAL EVERY STUDENT SUCCEEDS ACT (ESSA) MAINTENANCE OF EFFORT REQUIREMENT

NOTE: IF YOUR CHARTER SCHOOL RECEIVED FEDERAL FUNDING, AS REPORTED IN SECTION A2, THE FOLLOWING ADDITIONAL INFORMATION MUST BE PROVIDED IN ORDER FOR THE CDE TO CALCULATE COMPLIANCE WITH THE FEDERAL EVERY STUDENT SUCCEEDS ACT (ESSA) MAINTENANCE OF EFFORT REQUIREMENT:

1. Federal Revenue Used for Capital Outlay and Debt Service

Included in the Capital Outlay and Debt Service expenditures reported in sections B6 and B7 are the following amounts paid out of federal funds:

Federal Program Name (If no amounts, indicate "NONE")	Capital Outlay	Debt Service	Total
a.	$		0.00
b.			0.00
c.			0.00
d.			0.00
e.			0.00
f.			0.00
g.			0.00
h.			0.00
i.			0.00
j.			0.00
TOTAL FEDERAL REVENUES USED FOR CAPITAL OUTLAY AND DEBT SERVICE	0.00	0.00	0.00

2. Community Services Expenditures

Provide the amount of State and Local funds reported in Section B that were expended for Community Services Activities:

Objects of Expenditures		Amount (Enter "0.00" if none)
a. Certificated Salaries	1000-1999	
b. Noncertificated Salaries	2000-2999	
c. Employee Benefits	except 3801-	
d. Books and Supplies	4000-4999	
e. Services and Other Operating Expenditures	5000-5999	
TOTAL COMMUNITY SERVICES EXPENDITURES		0.00

3. Supplemental State and Local Expenditures resulting from a Presidentially Declared Disaster

Brief Description i.e., COVID-19 (If no amounts, indicate “None”)	Amount
a.	
b.	
c.	
d.	
TOTAL SUPPLEMENTAL EXPENDITURES (Should not be negative)	0.00

CHARTER SCHOOL JULY BUDGET
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2026 to June 30, 2027

Charter School Name: Sage Oak Charter School - Keppel
CDS #: 19646420136127

4. State and Local Expenditures to be Used for ESSA Annual Maintenance of Effort Calculation:
Results of this calculation will be used for comparison with 2020-21 expenditures. Failure to maintain the required 90 percent expenditure level on either an aggregate or per capita expenditure basis may result in reduction to allocations for covered programs in 2023-24.

a.	Total Expenditures (B8)	9,710,213.00
b.	Less Federal Expenditures (Total A2) [Revenues are used as proxy for expenditures because most federal revenues are normally recognized in the period that qualifying expenditures are incurred]	169,088.00
c.	Subtotal of State & Local Expenditures [a minus b]	9,541,125.00
d.	Less Community Services [L2 Total]	0.00
e.	Less Capital Outlay & Debt Service [Total B6 plus objects 7438 and 7439, less L1 Total, less objects 6600 and 6910]	23,870.00
f.	Less Supplemental State and Local Expenditures resulting from a Presidentially Declared Disaster	0.00
	TOTAL STATE & LOCAL EXPENDITURES SUBJECT TO MOE [c minus d minus e minus f]	$ 9,517,255.00

SAGE OAK
CHARTER SCHOOLS

Sage Oak Charter School - South
2026-27 July Budget

Summary Analysis

Sage Oak Charter School - South

Summary of Results

The 2026-27 July Budget projects a net revenue of $233K. The 2025-26 Estimated Actuals (EA) projects a net revenue of $96K. Positive net revenue and a strong reserve balance will allow Sage Oak Charter Schools to end the 2026-27 fiscal year with a reserve of $5.1M, which is 41.7% of annual expenditures.

Cash Flow

In the budgeted year's cash flow analysis, it was observed that the cash is projected to reach its lowest point at the end of December 2026, with $3.5M potential cash on hand. The cash reserve is deemed sufficient to sustain operations and safeguard against potential economic shocks.

Changes to Revenue

The 16.7% change in revenue from the 2025-26 EA to the 2026-27 July Budget is mainly due to Local Control Funding Formula (LCFF), federal, and state revenues. Student average daily attendance (ADA) changed from 685 during the 2025-26 EA to 771 in the 2026-27 July.

Changes to Expenditures

Sage Oak-South has an overall change of 15.5% in expenditures from the 2025-26 EA to the 2026-27 July Budget. The change is attributable to staffing, materials, and service costs associated with shifts in student enrollment.

Enrollment and ADA Assumptions

Sage Oak Charter School - South

2026-27

	Enrollment	ADA	Unduplicated Pupil Percentage (UPP)
TK-3	403	400	
4-6	175	174	
7-8	85	84	
9-12	114	113	
Total	777	771	391
Growth	12.4 %	99.2 %	50.3 %

2027-28

	Enrollment	ADA	UPP
TK-3	437	434	
4-6	188	187	
7-8	92	91	
9-12	123	122	
Total	840	833	423
Growth	8.1 %	99.2 %	50.4 %

2028-29

	Enrollment	ADA	UPP
TK-3	470	466	
4-6	202	200	
7-8	99	98	
9-12	132	131	
Total	903	896	455
Growth	7.5 %	99.2 %	50.4 %

SAGE OAK CHARTER SCHOOLS

2026-27 JULY vs EA - Summary

Sage Oak Charter School - South

	2026-27 July	2025-26 EA	$ Change	% Change
Revenue				
Total LCFF Revenues	10,358,376	8,799,132	1,559,244	17.7 %
Total Federal Revenue	189,924	192,042	(2,118)	(1.1) %
Total Other State Revenue	1,648,580	1,368,851	279,729	20.4 %
Total Local Revenue	230,236	289,856	(59,620)	(20.6) %
Total Revenue	12,427,116	10,649,881	1,777,235	16.7 %
Expenditures				
Total 1000-1999 Certificated Salaries	4,968,061	4,113,236	854,825	20.8 %
Total 2000-2999 Classified Salaries	1,342,210	1,044,890	297,320	28.5 %
Total 3000-3999 Employee Benefits	2,306,658	1,850,396	456,262	24.7 %
Total 4100-4799 Books, Materials, & Supplies	1,295,930	1,324,492	(28,562)	(2.2) %
Total 5100-5999 Services & Other Operating Expenditures	2,251,310	2,208,564	42,746	1.9 %
Total 6100-6999 Capital Outlay	30,163	12,701	17,462	137.5 %
Total Expenditures	12,194,332	10,554,279	1,640,053	15.5 %
Operating Income/(Loss)	232,784	95,602	137,182	143.5 %
Net Assets				
9791 - Beginning Fund Balance	4,852,386	4,756,784	95,602	2.0 %
Total Net Assets	4,852,386	4,756,784	95,602	2.0 %
Change In Net Assets	232,784	95,602	137,182	143.5 %
Total Net Assets	5,085,170	4,852,386	232,784	4.8 %

Net revenue as a % of expense	1.9 %	0.9 %
Fund balance as a % of expense	41.7 %	46.0 %
Days of Potential Cash	152	168

SAGE OAK CHARTER SCHOOLS

2026-27 JULY vs EA - Detail

Sage Oak Charter School - South

	2026-27 July	2025-26 EA	$ Change	% Change	Notes
Revenue					
LCFF Revenue					
8011 - LCFF General Entitlement	9,858,860	8,316,046	1,542,814	18.6 %	
8012 - EPA Entitlement	154,136	137,181	16,955	12.4 %	
8019 - Prior Year Unrestricted Revenue	0	526	(526)	(100.0) %	
8096 - In-Lieu-Of Property Taxes	345,380	345,379	1	0.0 %	
Total LCFF Revenues	10,358,376	8,799,132	1,559,244	17.7 %	The change is due to enrollment and ADA.
Federal Revenue					
8181 - Federal IDEA SpEd Revenue	82,806	89,272	(6,466)	(7.2) %	The change is due to the updated allocations from the SELPA.
8182 - SpEd - Discretionary Grants	5,525	5,996	(471)	(7.9) %	
8290 - Other Federal Revenue	101,593	96,774	4,819	5.0 %	The change is due to the updated allocations from the California Department of Education (CDE).
Total Federal Revenue	189,924	192,042	(2,118)	(1.1) %	
Other State Revenue					
8311 - AB602 State SpEd Revenue	1,032,723	629,339	403,384	64.1 %	The change is due to enrollment and ADA.
8550 - Mandated Cost Reimbursements	18,418	14,840	3,578	24.1 %	
8560 - Lottery- Unrestricted	152,943	133,631	19,312	14.5 %	
8561 - Lottery- Prop 20 - Restricted	66,007	55,714	10,293	18.5 %	
8590 - Other State Revenue	378,489	535,327	(156,838)	(29.3) %	The change is due to recognizing the one-time AMIM grant.
Total Other State Revenue	1,648,580	1,368,851	279,729	20.4 %	The change is due to enrollment and ADA.
Local Revenue					
8660 - Interest Income	230,236	289,856	(59,620)	(20.6) %	The change is due to projected federal interest rates.
Total Local Revenue	230,236	289,856	(59,620)	(20.6) %	
Total Revenue	12,427,116	10,649,881	1,777,235	16.7 %	
Expenditures					
1000-1999 Certificated Salaries					
1100 Certificated Teachers Salaries	3,221,292	2,756,172	465,120	16.9 %	
1200 Certificated Pupil Support	1,185,535	845,411	340,124	40.2 %	
1300 Certificated Supervisors and Administrators Salaries	561,234	511,653	49,581	9.7 %	
Total 1000-1999 Certificated Salaries	4,968,061	4,113,236	854,825	20.8 %	The change is due to staffing needs aligned with student enrollment.
2000-2999 Classified Salaries					
2100 Classified Instructional Salaries	204,707	148,905	55,802	37.5 %	
2300 Classified Supervisors and Admin Salaries	545,968	477,245	68,723	14.4 %	
2400 Clerical, Technical and Office Salaries	591,535	418,740	172,795	41.3 %	
Total 2000-2999 Classified Salaries	1,342,210	1,044,890	297,320	28.5 %	The change is due to staffing needs aligned with student enrollment.
3000-3999 Employee Benefits					
3101-3102 STRS					
3101 - STRS Certificated	946,439	785,151	161,288	20.5 %	
Total 3101-3102 STRS	946,439	785,151	161,288	20.5 %	The change is due to staffing needs aligned with student enrollment.
3301-3302 OASDI/Medicare/Alternative					
3313 - Medicare - Certificated	74,281	61,345	12,936	21.1 %	
3314 - Medicare - Classified	19,932	15,346	4,586	29.9 %	
3355 - OASDI - Certificated	0	286	(286)	(100.0) %	The change is due to the projected number of staff contributing to Social Security Taxes.
3356 - OASDI - Classified	85,227	65,337	19,890	30.4 %	
Total 3301-3302 OASDI/Medicare/Alternative	179,440	142,314	37,126	26.1 %	The change is due to staffing needs aligned with student enrollment.
3401-3402 Health and Welfare Benefits					
3401 - Health Care Certificated	556,994	479,588	77,406	16.1 %	
3402 - Health Care Classified	210,123	166,033	44,090	26.6 %	
Total 3401-3402 Health and Welfare Benefits	767,117	645,621	121,496	18.8 %	The change is due to staffing needs aligned with student enrollment.
3501-3502 Unemployment Insurance					
3501 - Unemployment Insurance Certificated	11,616	11,331	285	2.5 %	
3502 - Unemployment Insurance Classified	5,340	5,828	(488)	(8.4) %	
Total 3501-3502 Unemployment Insurance	16,956	17,159	(203)	(1.2) %	

2026-27 JULY vs EA - Detail

Sage Oak Charter School - South

	2026-27 July	2025-26 EA	$ Change	% Change	Notes
3601-3602 Workers' Compensation					
3601 - Workers' Comp Certificated	24,334	15,145	9,189	60.7 %	
3602 - Workers' Comp Classified	6,530	3,788	2,742	72.4 %	
Total 3601-3602 Workers' Compensation	30,864	18,933	11,931	63.0 %	The change is due to staffing needs aligned with student enrollment.
3901-3902 Other Employee Benefits					
3901 - Other Benefits Cert	187,202	147,710	39,492	26.7 %	
3902 - Other Benefits Class	44,823	28,415	16,408	57.7 %	
3922 - 457b Employer match-Classified	133,817	65,093	68,724	105.6 %	
Total 3901-3902 Other Employee Benefits	365,842	241,218	124,624	51.7 %	The change is due to staffing needs aligned with student enrollment.
Total 3000-3999 Employee Benefits	2,306,658	1,850,396	456,262	24.7 %	
4100-4799 Books, Materials, & Supplies					
4200 Books and Other Reference Materials					
4200 - Other Reference Materials	170,747	84,765	85,982	101.4 %	
Total 4200 Books and Other Reference Materials	170,747	84,765	85,982	101.4 %	The change is due to coding alignment for Sage Crates curriculum.
4300 Materials and Supplies					
4310 - Materials & Supplies	91,567	90,205	1,362	1.5 %	
4320 - Office Supplies	44,007	25,047	18,960	75.7 %	The change is due to upgrading staff MiFi devices.
4330 - Events Supplies	4,976	2,771	2,205	79.6 %	The change is due to planned activities for students.
4350 - Other Supplies - Materials & Supplies	2,433	2,150	283	13.2 %	The change is due to graduation supplies.
4381 - Instructional Funds - Materials	814,607	777,200	37,407	4.8 %	The change is due to enrollment and the Instructional Funds (IF) rate.
Total 4300 Materials and Supplies	957,590	897,373	60,217	6.7 %	
4400 Noncapitalized Equipment					
4400 - Non-Capitalized Equipment	167,593	342,354	(174,761)	(51.0) %	The change is due to planned student Chromebook replacements.
Total 4400 Noncapitalized Equipment	167,593	342,354	(174,761)	(51.0) %	
Total 4100-4799 Books, Materials, & Supplies	1,295,930	1,324,492	(28,562)	(2.2) %	
5100-5999 Services & Other Operating Expenditures					
5100 Subagreements for Services					
5100 - SpEd Consultants and Vendors Subagreements for Service	27,244	87,065	(59,821)	(68.7) %	
Total 5100 Subagreements for Services	27,244	87,065	(59,821)	(68.7) %	The change is due to employee recruitment in place of external consultants.
5200 Travel and Conferences					
5210 - Mileage Reimbursements	3,419	3,376	43	1.3 %	
5220 - Travel & Conferences	59,575	54,108	5,467	10.1 %	The change is due to staff attendance at professional development conferences.
Total 5200 Travel and Conferences	62,994	57,484	5,510	9.6 %	
5300 Dues and Memberships					
5300 - Dues & Memberships	32,396	25,194	7,202	28.6 %	
Total 5300 Dues and Memberships	32,396	25,194	7,202	28.6 %	The change is due to membership fees based on student enrollment.
5400 Insurance					
5400 - Insurance	34,750	34,854	(104)	(0.3) %	
Total 5400 Insurance	34,750	34,854	(104)	(0.3) %	
5500 Operations and Housekeeping Services					
5510 - Utilities (General)	22,532	25,078	(2,546)	(10.2) %	
Total 5500 Operations and Housekeeping Services	22,532	25,078	(2,546)	(10.2) %	The change is due to Hotspot services.
5600 Rents, Leases, Repairs, and Noncap. Improvements					
5610 - Facility Rents & Leases	145,335	156,121	(10,786)	(6.9) %	The change is due to facility costs based on current lease estimates.
5612 - Testing Site	16,680	13,595	3,085	22.7 %	The change is due to Special Education assessment site rentals.
5620 - Equipment Leases	806	829	(23)	(2.8) %	
Total 5600 Rents, Leases, Repairs, and Noncap. Improvements	162,821	170,545	(7,724)	(4.5) %	

2026-27 JULY vs EA - Detail

Sage Oak Charter School - South

	2026-27 July	2025-26 EA	$ Change	% Change	Notes
5800 Professional/Consulting Services and Operating Expend.					
5800 - Professional Services - Non-instructional	42,460	40,905	1,555	3.8 %	The change is due to marketing consultant services supporting data systems.
5810 - Legal	40,254	41,454	(1,200)	(2.9) %	
5820 - Audit & CPA	9,035	10,577	(1,542)	(14.6) %	The change is due to the updated contract for audit services.
5835 - Field Trips	19,669	17,907	1,762	9.8 %	The change is due to student field trips.
5840 - Advertising & Recruitment	11,717	17,653	(5,936)	(33.6) %	The change is due to advertising expenses supporting marketing and recruitment.
5850 - Oversight Fees	103,168	87,991	15,177	17.2 %	The change is due to enrollment.
5860 - Service Fees	65,333	65,864	(531)	(0.8) %	
5863 - Professional Development	228,102	92,744	135,358	145.9 %	The change is due to professional development opportunities for teachers and staff.
5870 - Livescan Fingerprinting	104	166	(62)	(37.3) %	The change is due to the number of Livescan reimbursements.
5877 - Lending Library	1,766	37,411	(35,645)	(95.3) %	The change is due to coding alignment for Sage Crates curriculum.
5878 - Student Assessment	5,490	5,306	184	3.5 %	
5880 - Instructional Vendors & Consultants	9,466	32,982	(23,516)	(71.3) %	The change is due to continued student conferences aligned with participation requirements.
5881 - Instructional Funds - Services	995,631	949,910	45,721	4.8 %	The change is due to enrollment and the IF rate.
5883 - Outside Consultant and Services	5,963	2,263	3,700	163.5 %	The change is due to contracting an outside consultant to update job descriptions.
5887 - Student Service Technology	167,055	150,897	16,158	10.7 %	The change is due to additional technology programs for students and staff.
Total 5800 Professional/Consulting Services and Operating Expend.	1,705,213	1,554,030	151,183	9.7 %	
5900 Communications					
5930 - Postage	20,363	20,896	(533)	(2.6) %	
5940 - Technology Services	182,997	233,418	(50,421)	(21.6) %	The change is due to coding alignment for IT projects.
Total 5900 Communications	203,360	254,314	(50,954)	(20.0) %	
Total 5100-5999 Services & Other Operating Expenditures	2,251,310	2,208,564	42,746	1.9 %	
6100-6999 Capital Outlay					
Capital Expenditures					
6901 - Depreciation Expense-Leasehold Improvements	30,163	12,701	17,462	137.5 %	
Total Capital Expenditures	30,163	12,701	17,462	137.5 %	The change is due to depreciation on capitalized equipment and leasehold improvements.
Total 6100-6999 Capital Outlay	30,163	12,701	17,462	137.5 %	
Total Expenditures	12,194,332	10,554,279	1,640,053	15.5 %	
Operating Income/(Loss)	232,784	95,602	137,182	143.5 %	
Net Assets					
9791 - Beginning Fund Balance	4,852,386	4,756,784	95,602	2.0 %	
Total Net Assets	4,852,386	4,756,784	95,602	2.0 %	
Change In Net Assets	232,784	95,602	137,182	143.5 %	
Total Net Assets	5,085,170	4,852,386	232,784	4.8 %	

Net revenue as a % of expense	1.9 %	0.9 %
Fund balance as a % of expense	41.7 %	46.0 %
Days of Potential Cash	152	168

2026-27 JULY vs EA - MYP Summary

Sage Oak Charter School - South

Enrollment	777	840	903
ADA	771	833	896
COLA	2.87 %	3.06 %	3.34 %

	2026-27 July	2027-28	2028-29
Revenue			
Total LCFF Revenues	10,358,376	11,619,966	12,880,586
Total Federal Revenue	189,924	189,924	189,924
Total Other State Revenue	1,648,580	1,714,316	1,784,051
Total Local Revenue	230,236	230,236	230,236
Total Revenue	12,427,116	13,754,442	15,084,797
Expenditures			
Total 1000-1999 Certificated Salaries	4,968,061	5,488,691	6,165,712
Total 2000-2999 Classified Salaries	1,342,210	1,512,635	1,739,973
Total 3000-3999 Employee Benefits	2,306,658	2,622,130	2,937,789
Total 4100-4799 Books, Materials, & Supplies	1,295,930	1,312,759	1,335,796
Total 5100-5999 Services & Other Operating Expenditures	2,251,310	2,290,750	2,313,786
Total 6100-6999 Capital Outlay	30,163	30,297	28,756
Total Expenditures	12,194,332	13,257,262	14,521,812
Operating Income/(Loss)	232,784	497,180	562,985
Net Assets			
9791 - Beginning Fund Balance	4,852,386	5,085,170	5,582,350
Total Net Assets	4,852,386	5,085,170	5,582,350
Change In Net Assets	232,784	497,180	562,985
Total Net Assets	5,085,170	5,582,350	6,145,335

Net revenue as a % of expense	1.9 %	3.8 %	3.9 %
Fund balance as a % of expense	41.7 %	42.1 %	42.3 %
Days of Potential Cash	152	154	154

SAGE OAK CHARTER SCHOOLS

2026-27 JULY vs EA - MYP Detail

Sage Oak Charter School - South

	2026-27 July	2027-28	2028-29
Revenue			
LCFF Revenue			
8011 - LCFF General Entitlement	9,858,860	11,107,930	12,356,051
8012 - EPA Entitlement	154,136	166,656	179,155
8096 - In-Lieu-Of Property Taxes	345,380	345,380	345,380
Total LCFF Revenues	10,358,376	11,619,966	12,880,586
Federal Revenue			
8181 - Federal IDEA SpEd Revenue	82,806	82,806	82,806
8182 - SpEd - Discretionary Grants	5,525	5,525	5,525
8290 - Other Federal Revenue	101,593	101,593	101,593
Total Federal Revenue	189,924	189,924	189,924
Other State Revenue			
8311 - AB602 State SpEd Revenue	1,032,723	1,150,761	1,278,388
8550 - Mandated Cost Reimbursements	18,418	21,388	23,878
8560 - Lottery- Unrestricted	152,943	165,362	177,764
8561 - Lottery- Prop 20 - Restricted	66,007	71,367	76,719
8590 - Other State Revenue	378,489	305,438	227,302
Total Other State Revenue	1,648,580	1,714,316	1,784,051
Local Revenue			
8660 - Interest Income	230,236	230,236	230,236
Total Local Revenue	230,236	230,236	230,236
Total Revenue	12,427,116	13,754,442	15,084,797
Expenditures			
1000-1999 Certificated Salaries			
1100 Certificated Teachers Salaries	3,221,292	3,663,317	4,258,196
1200 Certificated Pupil Support	1,185,535	1,238,884	1,294,634
1300 Certificated Supervisors and Administrators Salaries	561,234	586,490	612,882
Total 1000-1999 Certificated Salaries	4,968,061	5,488,691	6,165,712
2000-2999 Classified Salaries			
2100 Classified Instructional Salaries	204,707	213,922	223,548
2300 Classified Supervisors and Admin Salaries	545,968	570,535	596,209
2400 Clerical, Technical and Office Salaries	591,535	728,178	920,216
Total 2000-2999 Classified Salaries	1,342,210	1,512,635	1,739,973
3000-3999 Employee Benefits			
3101-3102 STRS			
3101 - STRS Certificated	946,439	1,077,640	1,247,165
Total 3101-3102 STRS	946,439	1,077,640	1,247,165

2026-27 JULY vs EA - MYP Detail

Sage Oak Charter School - South

	2026-27 July	2027-28	2028-29
3301-3302 OASDI/Medicare/Alternative			
3313 - Medicare - Certificated	74,281	82,452	91,522
3314 - Medicare - Classified	19,932	22,125	24,559
3356 - OASDI - Classified	85,227	89,062	93,070
Total 3301-3302 OASDI/Medicare/Alternative	179,440	193,639	209,151
3401-3402 Health and Welfare Benefits			
3401 - Health Care Certificated	556,994	618,262	686,272
3402 - Health Care Classified	210,123	223,781	238,326
Total 3401-3402 Health and Welfare Benefits	767,117	842,043	924,598
3501-3502 Unemployment Insurance			
3501 - Unemployment Insurance Certificated	11,616	12,139	12,921
3502 - Unemployment Insurance Classified	5,340	5,582	6,196
Total 3501-3502 Unemployment Insurance	16,956	17,721	19,117
3601-3602 Workers' Compensation			
3601 - Workers' Comp Certificated	24,334	25,429	27,152
3602 - Workers' Comp Classified	6,530	6,823	7,573
Total 3601-3602 Workers' Compensation	30,864	32,252	34,725
3901-3902 Other Employee Benefits			
3901 - Other Benefits Cert	187,202	248,694	263,433
3902 - Other Benefits Class	44,823	58,077	62,997
3922 - 457b Employer match-Classified	133,817	152,064	176,603
Total 3901-3902 Other Employee Benefits	365,842	458,835	503,033
Total 3000-3999 Employee Benefits	2,306,658	2,622,130	2,937,789
4100-4799 Books, Materials, & Supplies			
4200 Books and Other Reference Materials			
4200 - Other Reference Materials	170,747	172,284	169,891
Total 4200 Books and Other Reference Materials	170,747	172,284	169,891
4300 Materials and Supplies			
4310 - Materials & Supplies	91,567	87,971	85,950
4320 - Office Supplies	44,007	32,334	31,847
4330 - Events Supplies	4,976	4,931	4,808
4350 - Other Supplies - Materials & Supplies	2,433	2,412	2,353
4381 - Instructional Funds - Materials	814,607	849,655	881,587
Total 4300 Materials and Supplies	957,590	977,303	1,006,545
4400 Noncapitalized Equipment			
4400 - Non-Capitalized Equipment	167,593	163,172	159,360
Total 4400 Noncapitalized Equipment	167,593	163,172	159,360
Total 4100-4799 Books, Materials, & Supplies	1,295,930	1,312,759	1,335,796

2026-27 JULY vs EA - MYP Detail

Sage Oak Charter School - South

	2026-27 July	2027-28	2028-29
5100-5999 Services & Other Operating Expenditures			
5100 Subagreements for Services			
5100 - SpEd Consultants and Vendors Subagreements for Service	27,244	28,823	29,634
Total 5100 Subagreements for Services	27,244	28,823	29,634
5200 Travel and Conferences			
5210 - Mileage Reimbursements	3,419	3,685	3,599
5220 - Travel & Conferences	59,575	63,060	61,582
Total 5200 Travel and Conferences	62,994	66,745	65,181
5300 Dues and Memberships			
5300 - Dues & Memberships	32,396	23,959	23,357
Total 5300 Dues and Memberships	32,396	23,959	23,357
5400 Insurance			
5400 - Insurance	34,750	23,142	21,965
Total 5400 Insurance	34,750	23,142	21,965
5500 Operations and Housekeeping Services			
5510 - Utilities (General)	22,532	21,747	18,810
Total 5500 Operations and Housekeeping Services	22,532	21,747	18,810
5600 Rents, Leases, Repairs, and Noncap. Improvements			
5610 - Facility Rents & Leases	145,335	140,335	133,412
5612 - Testing Site	16,680	17,407	17,933
5620 - Equipment Leases	806	804	789
Total 5600 Rents, Leases, Repairs, and Noncap. Improvements	162,821	158,546	152,134

2026-27 JULY vs EA - MYP Detail

Sage Oak Charter School - South

	2026-27 July	2027-28	2028-29
5800 Professional/Consulting Services and Operating Expend.			
5800 - Professional Services - Non-instructional	42,460	45,024	43,153
5810 - Legal	40,254	39,878	38,943
5820 - Audit & CPA	9,035	8,536	8,330
5835 - Field Trips	19,669	19,142	18,810
5840 - Advertising & Recruitment	11,717	11,484	11,052
5850 - Oversight Fees	103,168	116,200	128,806
5860 - Service Fees	65,333	64,695	63,185
5863 - Professional Development	228,102	228,258	221,009
5870 - Livescan Fingerprinting	104	494	580
5877 - Lending Library	1,766	1,796	1,793
5878 - Student Assessment	5,490	5,440	5,316
5880 - Instructional Vendors & Consultants	9,466	9,139	8,687
5881 - Instructional Funds - Services	995,631	1,038,467	1,077,495
5883 - Outside Consultant and Services	5,963	5,909	5,774
5887 - Student Service Technology	167,055	173,273	171,798
Total 5800 Professional/Consulting Services and Operating Expend.	1,705,213	1,767,735	1,804,731
5900 Communications			
5930 - Postage	20,363	20,180	19,713
5940 - Technology Services	182,997	179,873	178,261
Total 5900 Communications	203,360	200,053	197,974
Total 5100-5999 Services & Other Operating Expenditures	2,251,310	2,290,750	2,313,786

2026-27 JULY vs EA - MYP Detail

Sage Oak Charter School - South

	2026-27 July	2027-28	2028-29
6100-6999 Capital Outlay			
Capital Expenditures			
6901 - Depreciation Expense-Leasehold Improvements	30,163	30,297	28,756
Total Capital Expenditures	30,163	30,297	28,756
Total 6100-6999 Capital Outlay	30,163	30,297	28,756
Total Expenditures	12,194,332	13,257,262	14,521,812
Operating Income/(Loss)	232,784	497,180	562,985
Net Assets			
9791 - Beginning Fund Balance	4,852,386	5,085,170	5,582,350
Total Net Assets	4,852,386	5,085,170	5,582,350
Change In Net Assets	232,784	497,180	562,985
Total Net Assets	5,085,170	5,582,350	6,145,335

Net revenue as a % of expense	1.9 %	3.8 %	3.9 %
Fund balance as a % of expense	41.7 %	42.1 %	42.3 %
Days of Potential Cash	152	154	154

SAGE OAK CHARTER SCHOOLS

2026-27 JULY vs EA
Cash Flow Statement 2026-27
Sage Oak Charter School - South

	Year Ending 06/30/2027	Month Ending 07/31/2026	Month Ending 08/31/2026	Month Ending 09/30/2026	Month Ending 10/31/2026	Month Ending 11/30/2026	Month Ending 12/31/2026	Month Ending 01/31/2027	Month Ending 02/28/2027	Month Ending 03/31/2027	Month Ending 04/30/2027	Month Ending 05/31/2027	Month Ending 06/30/2027		
	2026-27 July	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Total	Variance
Cash Balance															
Beginning Cash	4,131,151	4,131,151	4,392,418	3,818,300	3,789,213	3,759,408	3,683,277	3,538,784	3,576,902	4,022,568	4,491,172	4,750,263	4,385,897		
Net Cash for Period															
REVENUES	12,427,116	497,908	521,971	979,769	869,449	894,566	970,501	957,233	1,260,915	1,427,786	1,292,914	1,297,725	1,456,379	12,427,116	0
EXPENDITURES	12,194,332	761,574	965,560	988,272	942,542	926,524	1,009,732	974,816	1,015,456	1,053,574	1,068,684	1,080,149	1,407,449	12,194,332	0
Net Cash for Period	232,784	(263,666)	(443,589)	(8,503)	(73,093)	(31,958)	(39,231)	(17,583)	245,459	374,212	224,230	217,576	48,930	232,784	0
Accounts Receivable	356,617	(487,816)	(34,841)	5,385	(5,314)		(927)	23,216	12,803	(22,538)	(10,592)	625,399	251,842	356,617	0
Other Assets	(47,846)	(6,918)	(8,129)	(1,431)	(454)	(5,024)	(3,325)	(7,555)	(30,420)	(10,876)	(1,162)	(8,426)	35,874	(47,846)	0
Accounts Payable	202,097	(35,206)	(116,953)	39,833	62,772	(46,382)	(63,317)	93,632	(4,021)	51,292	29,648	(114,407)	305,206	202,097	0
Deferred Revenue/Prepaid Expenses	827,909	65,405	(56,546)	(56,463)	(25,252)	(2,815)	(46,197)	(22,270)	186,611	9,686	(6,541)	149,438	632,853	827,909	0
Cash at End of Period	5,085,170	4,392,418	3,818,300	3,789,213	3,759,408	3,683,277	3,538,784	3,576,902	4,022,568	4,491,172	4,750,263	4,385,897	5,085,170		
Days of Potential Cash	152	131	114	113	113	110	106	107	120	134	142	131	152		

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2026-27 JULY vs EA
Cash Flow Statement 2027-28
Sage Oak Charter School - South

	Year Ending 06/30/2028	Month Ending 07/31/2027	Month Ending 08/31/2027	Month Ending 09/30/2027	Month Ending 10/31/2027	Month Ending 11/30/2027	Month Ending 12/31/2027	Month Ending 01/31/2028	Month Ending 02/29/2028	Month Ending 03/31/2028	Month Ending 04/30/2028	Month Ending 05/31/2028	Month Ending 06/30/2028		
	2026-27 July	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Total	Variance
Cash Balance															
Beginning Cash	5,085,170	5,085,170	5,078,751	4,450,728	4,427,302	4,405,531	4,307,856	4,195,851	4,149,050	4,501,567	4,957,584	5,686,044	5,577,685		
Net Cash for Period															
REVENUES	13,754,442	519,918	475,904	1,048,088	1,074,222	828,017	994,446	1,031,583	1,430,462	1,508,862	1,866,478	1,360,314	1,616,147	13,754,442	0
EXPENDITURES	13,257,262	481,239	930,660	1,169,291	1,114,936	943,917	1,149,405	1,079,141	1,081,793	1,065,884	1,185,199	1,474,208	1,581,591	13,257,262	0
Net Cash for Period	497,180	38,679	(454,756)	(121,202)	(40,714)	(115,900)	(154,958)	(47,558)	348,669	442,978	681,279	(113,893)	34,556	497,180	0
Accounts Receivable	287,716	(4,891)	326,989	(6,186)	9,351		201	2,503					(40,252)	287,716	0
Accounts Payable	116,200	(2,429)	119,128	(5,694)	5,671	(128)	465	(651)	23	209	546	(1,069)	127	116,200	0
Deferred Revenue/Prepaid Expenses	171,516	(47,561)	34,595	97,284	22,623	18,352	42,690	3,911	3,825	12,829	46,635	6,603	(70,270)	171,516	0
Cash at End of Period	5,582,350	5,078,751	4,450,728	4,427,302	4,405,531	4,307,856	4,195,851	4,149,050	4,501,567	4,957,584	5,686,044	5,577,685	5,582,350		
Days Cash on Hand	154	140	123	122	121	119	116	114	124	136	157	154	154		

Powered by BoardOnTrack

CHARTER SCHOOL JULY BUDGET
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2026 to June 30, 2027

Charter School Name: Sage Oak Charter School - South
CDS #: 37754160139378
Charter Approving Entity: Warner Unified School District
County: San Diego
Charter #: 2051

This charter school uses the following basis of accounting:
(Please enter an "X" in the applicable box below; check only one box)

[X] **Accrual Basis** (Applicable Capital Assets/Interest on Long-Term Debt/Long-Term Liabilities/Net Position objects are 6900, 6910, 7438, 9400-9489, 9660-9669, 9796, and 9797)

[ ] **Modified Accrual Basis** (Applicable Capital Outlay/Debt Service/Fund Balance objects are 6100-6170, 6200-6500, 6600, 7438, 7439, and 9711-9789)

Description	Object Code	Unrestricted	Restricted	Total
A. REVENUES				
1. LCFF Sources				
State Aid - Current Year	8011	9,858,860.00		9,858,860.00
Education Protection Account State Aid - Current Year	8012	154,136.00		154,136.00
State Aid - Prior Years	8019			0.00
Transfers to Charter Schools in Lieu of Property Taxes	8096	345,380.00		345,380.00
Other LCFF Transfers	8091, 8097			0.00
Total, LCFF Sources		10,358,376.00	0.00	10,358,376.00
2. Federal Revenues (see NOTE in Section L)				
No Child Left Behind/Every Student Succeeds Act	8290			0.00
Special Education - Federal	8181, 8182		82,806.00	82,806.00
Child Nutrition - Federal	8220			0.00
Donated Food Commodities	8221			0.00
Other Federal Revenues	8110, 8260-8299		107,118.00	107,118.00
Total, Federal Revenues		0.00	189,924.00	189,924.00
3. Other State Revenues				
Special Education - State	StateRevSE			0.00
All Other State Revenues	StateRevAO	171,361.00	1,477,219.00	1,648,580.00
Total, Other State Revenues		171,361.00	1,477,219.00	1,648,580.00
4. Other Local Revenues				
All Other Local Revenues	LocalRevAO	230,236.00		230,236.00
Total, Local Revenues		230,236.00	0.00	230,236.00
5. TOTAL REVENUES		10,759,973.00	1,667,143.00	12,427,116.00
B. EXPENDITURES (see NOTE in Section L)				
1. Certificated Salaries				
Certificated Teachers' Salaries	1100	2,842,037.00	379,255.00	3,221,292.00
Certificated Pupil Support Salaries	1200	595,645.00	589,890.00	1,185,535.00
Certificated Supervisors' and Administrators' Salaries	1300	509,338.00	51,896.00	561,234.00
Other Certificated Salaries	1900			0.00
Total, Certificated Salaries		3,947,020.00	1,021,041.00	4,968,061.00
2. Noncertificated Salaries				
Noncertificated Instructional Salaries	2100	100,042.00	104,665.00	204,707.00
Noncertificated Support Salaries	2200			0.00
Noncertificated Supervisors' and Administrators' Salaries	2300	519,968.00	26,000.00	545,968.00
Clerical, Technical and Office Salaries	2400	570,913.00	20,622.00	591,535.00
Other Noncertificated Salaries	2900			0.00
Total, Noncertificated Salaries		1,190,923.00	151,287.00	1,342,210.00

CHARTER SCHOOL JULY BUDGET

FINANCIAL REPORT -- ALTERNATIVE FORM

July 1, 2026 to June 30, 2027

Charter School Name: Sage Oak Charter School - South

CDS #: 37754160139378

Description	Object Code	Unrestricted	Restricted	Total
3. Employee Benefits				
STRS	3101-3102	762,109.00	184,330.00	946,439.00
PERS	3201-3202			0.00
OASDI / Medicare / Alternative	3301-3302	152,979.00	26,461.00	179,440.00
Health and Welfare Benefits	3401-3402	631,824.00	135,293.00	767,117.00
Unemployment Insurance	3501-3502	13,508.00	3,447.00	16,955.00
Workers' Compensation Insurance	3601-3602	25,389.00	5,475.00	30,864.00
OPEB, Allocated	3701-3702			0.00
OPEB, Active Employees	3751-3752			0.00
Other Employee Benefits	3901-3902	306,356.00	59,487.00	365,843.00
Total, Employee Benefits		1,892,165.00	414,493.00	2,306,658.00
4. Books and Supplies				
Approved Textbooks and Core Curricula Materials	4100			0.00
Books and Other Reference Materials	4200	160,748.00	10,000.00	170,748.00
Materials and Supplies	4300	905,076.00	52,514.00	957,590.00
Noncapitalized Equipment	4400	167,592.00		167,592.00
Food	4700			0.00
Total, Books and Supplies		1,233,416.00	62,514.00	1,295,930.00
5. Services and Other Operating Expenditures				
Subagreements for Services	5100		27,244.00	27,244.00
Travel and Conferences	5200	62,995.00		62,995.00
Dues and Memberships	5300	32,396.00		32,396.00
Insurance	5400	34,750.00		34,750.00
Operations and Housekeeping Services	5500	22,532.00		22,532.00
Rentals, Leases, Repairs, and Noncap. Improvements	5600	146,307.00	16,513.00	162,820.00
Transfers of Direct Costs	5700-5799			0.00
Professional/Consulting Services and Operating Expend.	5800	1,488,293.00	216,920.00	1,705,213.00
Communications	5900	203,360.00		203,360.00
Total, Services and Other Operating Expenditures		1,990,633.00	260,677.00	2,251,310.00
6. Capital Outlay				
(Objects 6100-6170, 6200-6500 modified accrual basis only)				
Land and Land Improvements	6100-6170			0.00
Buildings and Improvements of Buildings	6200			0.00
Books and Media for New School Libraries or Major Expansion of School Libraries	6300			0.00
Equipment	6400			0.00
Equipment Replacement	6500			0.00
Lease Assets	6600			0.00
Depreciation Expense (accrual basis only)	6900	30,163.00		30,163.00
Amortization Expense - Lease Assets	6910			0.00
Total, Capital Outlay		30,163.00	0.00	30,163.00
7. Other Outgo				
Tuition to Other Schools	7110-7143			0.00
Transfers of Pass-Through Revenues to Other LEAs	7211-7213			0.00
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE			0.00
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO			0.00
All Other Transfers	7281-7299			0.00
Transfers of Indirect Costs	7300-7399			0.00
Debt Service:				
Interest	7438			0.00
Principal (for modified accrual basis only)	7439			0.00
Total Debt Service		0.00	0.00	0.00
Total, Other Outgo		0.00	0.00	0.00
8. TOTAL EXPENDITURES		10,284,320.00	1,910,012.00	12,194,332.00

CHARTER SCHOOL JULY BUDGET
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2026 to June 30, 2027

Charter School Name: Sage Oak Charter School - South

CDS #: 37754160139378

Description	Object Code	Unrestricted	Restricted	Total
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)		475,653.00	(242,869.00)	232,784.00
D. OTHER FINANCING SOURCES / USES				
1. Other Sources	8930-8979			0.00
2. Less: Other Uses	7630-7699			0.00
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999	(242,869.00)	242,869.00	0.00
4. TOTAL OTHER FINANCING SOURCES / USES		(242,869.00)	242,869.00	0.00
E. NET INCREASE (DECREASE) IN FUND BALANCE /NET POSITION (C+D4)		232,784.00	0.00	232,784.00
F. FUND BALANCE / NET POSITION				
1. Beginning Fund Balance/Net Position				
a. As of July 1	9791	4,852,386.00		4,852,386.00
b. Adjustments/Restatements	9793, 9795			0.00
c. Adjusted Beginning Fund Balance /Net Position		4,852,386.00	0.00	4,852,386.00
2. Ending Fund Balance /Net Position, June 30 (E+F1c)		5,085,170.00	0.00	5,085,170.00
Components of Ending Fund Balance (Modified Accrual Basis only)				
a. Nonspendable				
1. Revolving Cash (equals Object 9130)	9711			0.00
2. Stores (equals Object 9320)	9712			0.00
3. Prepaid Expenditures (equals Object 9330)	9713			0.00
4. All Others	9719			0.00
b. Restricted	9740			0.00
c. Committed				
1. Stabilization Arrangements	9750			0.00
2. Other Commitments	9760			0.00
d. Assigned	9780			0.00
e. Unassigned/Unappropriated				
1. Reserve for Economic Uncertainties	9789			0.00
2. Unassigned/Unappropriated Amount	9790M			0.00
3. Components of Ending Net Position (Accrual Basis only)				
a. Net Investment in Capital Assets	9796	295,877.00	0.00	295,877.00
b. Restricted Net Position	9797			0.00
c. Unrestricted Net Position	9790A	4,789,293.00	0.00	4,789,293.00

CHARTER SCHOOL JULY BUDGET

FINANCIAL REPORT -- ALTERNATIVE FORM

July 1, 2026 to June 30, 2027

Charter School Name: Sage Oak Charter School - South

CDS #: 37754160139378

Description	Object Code	Unrestricted	Restricted	Total
G. ASSETS				
1. Cash				
In County Treasury	9110			0.00
Fair Value Adjustment to Cash in County Treasury	9111			0.00
In Banks	9120	3,576,942.00	554,209.00	4,131,151.00
In Revolving Fund	9130			0.00
With Fiscal Agent/Trustee	9135			0.00
Collections Awaiting Deposit	9140			0.00
2. Investments	9150			0.00
3. Accounts Receivable	9200	1,387,336.00	300,812.00	1,688,148.00
4. Due from Grantor Governments	9290			0.00
5. Stores	9320			0.00
6. Prepaid Expenditures (Expenses)	9330			0.00
7. Other Current Assets	9340			0.00
8. Lease Receivable	9380			0.00
9. Capital Assets (accrual basis only)	9400-9489	295,877.00		295,877.00
10. TOTAL ASSETS		5,260,155.00	855,021.00	6,115,176.00
H. DEFERRED OUTFLOWS OF RESOURCES				
1. Deferred Outflows of Resources	9490			0.00
2. TOTAL DEFERRED OUTFLOWS		0.00	0.00	0.00
I. LIABILITIES				
1. Accounts Payable	9500	174,985.00	27,112.00	202,097.00
2. Due to Grantor Governments	9590			0.00
3. Current Loans	9640			0.00
4. Unearned Revenue	9650			0.00
5. Long-Term Liabilities (accrual basis only)	9660-9669		827,909.00	827,909.00
6. TOTAL LIABILITIES		174,985.00	855,021.00	1,030,006.00
J. DEFERRED INFLOWS OF RESOURCES				
1. Deferred Inflows of Resources	9690			0.00
2. TOTAL DEFERRED INFLOWS		0.00	0.00	0.00
K. FUND BALANCE /NET POSITION				
Ending Fund Balance /Net Position, June 30 (G10 + H2) - (I6 + J2) (must agree with Line F2)		5,085,170.00	0.00	5,085,170.00

CHARTER SCHOOL JULY BUDGET

FINANCIAL REPORT -- ALTERNATIVE FORM

July 1, 2026 to June 30, 2027

Charter School Name: Sage Oak Charter School - South

CDS #: 37754160139378

L. FEDERAL EVERY STUDENT SUCCEEDS ACT (ESSA) MAINTENANCE OF EFFORT REQUIREMENT

NOTE: IF YOUR CHARTER SCHOOL RECEIVED FEDERAL FUNDING, AS REPORTED IN SECTION A2, THE FOLLOWING ADDITIONAL INFORMATION MUST BE PROVIDED IN ORDER FOR THE CDE TO CALCULATE COMPLIANCE WITH THE FEDERAL EVERY STUDENT SUCCEEDS ACT (ESSA) MAINTENANCE OF EFFORT REQUIREMENT:

1. Federal Revenue Used for Capital Outlay and Debt Service

Included in the Capital Outlay and Debt Service expenditures reported in sections B6 and B7 are the following amounts paid out of federal funds:

Federal Program Name (If no amounts, indicate "NONE")	Capital Outlay	Debt Service	Total
a.	$		0.00
b.			0.00
c.			0.00
d.			0.00
e.			0.00
f.			0.00
g.			0.00
h.			0.00
i.			0.00
j.			0.00
TOTAL FEDERAL REVENUES USED FOR CAPITAL OUTLAY AND DEBT SERVICE	0.00	0.00	0.00

2. Community Services Expenditures

Provide the amount of State and Local funds reported in Section B that were expended for Community Services Activities:

Objects of Expenditures		Amount (Enter "0.00" if none)
a. Certificated Salaries	1000-1999	
b. Noncertificated Salaries	2000-2999	
c. Employee Benefits	except 3801-	
d. Books and Supplies	4000-4999	
e. Services and Other Operating Expenditures	5000-5999	
TOTAL COMMUNITY SERVICES EXPENDITURES		0.00

3. Supplemental State and Local Expenditures resulting from a Presidentially Declared Disaster

Brief Description i.e., COVID-19 (If no amounts, indicate “None”)	Amount
a.	
b.	
c.	
d.	
TOTAL SUPPLEMENTAL EXPENDITURES (Should not be negative)	0.00

CHARTER SCHOOL JULY BUDGET
FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2026 to June 30, 2027

Charter School Name: Sage Oak Charter School - South
CDS #: 37754160139378

4. State and Local Expenditures to be Used for ESSA Annual Maintenance of Effort Calculation:
Results of this calculation will be used for comparison with 2020-21 expenditures. Failure to maintain the required 90 percent expenditure level on either an aggregate or per capita expenditure basis may result in reduction to allocations for covered programs in 2023-24.

a.	Total Expenditures (B8)	12,194,332.00
b.	Less Federal Expenditures (Total A2) [Revenues are used as proxy for expenditures because most federal revenues are normally recognized in the period that qualifying expenditures are incurred]	189,924.00
c.	Subtotal of State & Local Expenditures [a minus b]	12,004,408.00
d.	Less Community Services [L2 Total]	0.00
e.	Less Capital Outlay & Debt Service [Total B6 plus objects 7438 and 7439, less L1 Total, less objects 6600 and 6910]	30,163.00
f.	Less Supplemental State and Local Expenditures resulting from a Presidentially Declared Disaster	0.00
	TOTAL STATE & LOCAL EXPENDITURES SUBJECT TO MOE [c minus d minus e minus f]	$ 11,974,245.00

2026-27 LCFF Budget Overview for Parents Data Input Sheet

Local Educational Agency (LEA) Name:	Sage Oak Charter School
CDS Code:	36-67736-0136069
LEA Contact Information:	Name: Krista Woodgrift Position: Superintendent Email: kwoodgrift@sageoak.education Phone: 888-435-4445
Coming School Year:	2026-27
Current School Year:	2025-26

*NOTE: The "High Needs Students" referred to in the tables below are Unduplicated Students for LCFF funding purposes.

Projected General Fund Revenue for the 2026-27 School Year	**Amount** **Whole Numbers**
Total LCFF Funds	$62,116,084
LCFF Supplemental & Concentration Grants	$5,727,140
All Other State Funds	$10,725,813
All Local Funds	$509,562
All federal funds	$1,385,601
Total Projected Revenue	$74,737,060

Total Budgeted Expenditures for the 2026-27 School Year	**Amount** **Whole Numbers**
Total Budgeted General Fund Expenditures	$73,368,933
Total Budgeted Expenditures in the LCAP	$69,450,915
Total Budgeted Expenditures for High Needs Students in the LCAP	$52,051,000
Expenditures not in the LCAP	$3,918,018

Expenditures for High Needs Students in the 2025-26 School Year	**Amount** **Whole Numbers**
Total Budgeted Expenditures for High Needs Students in the LCAP	$41,983,385
Actual Expenditures for High Needs Students in LCAP	$42,322,736

Funds for High Needs Students	**Amount** **[AUTO-CALCULATED]**
2026-27 Difference in Projected Funds and Budgeted Expenditures	$46,323,860
2025-26 Difference in Budgeted and Actual Expenditures	$339,351

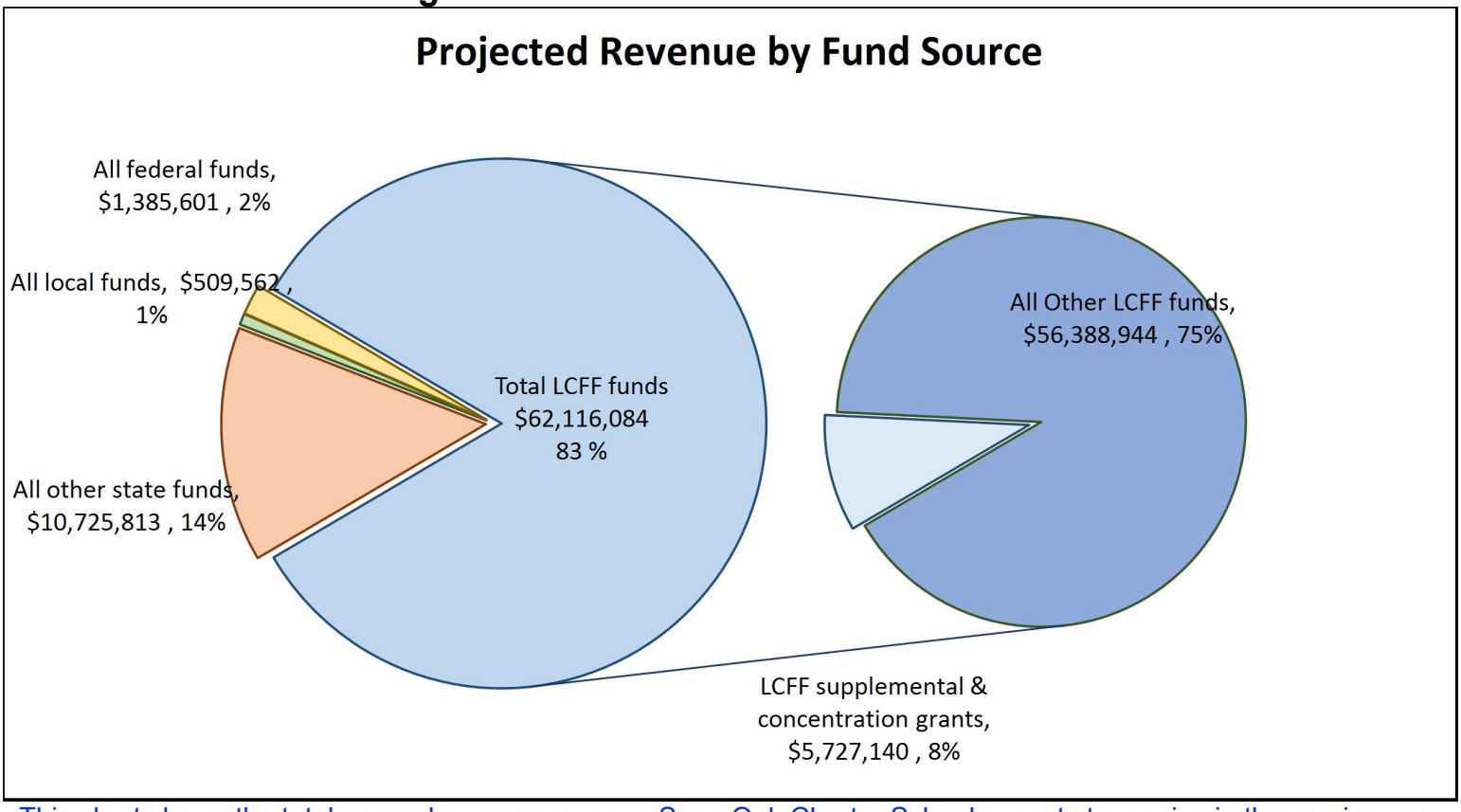
Required Prompts(s)	**Response(s)** **[FIELDS WILL APPEAR IF REQUIRED]**
Briefly describe any of the General Fund Budget Expenditures for the school year not included in the Local Control and Accountability Plan (LCAP).	Certain expenditures such as charter oversight fees, human resources administration, legal and compliance services, insurance, rent, and utilities, are necessary operational costs incurred to maintain Sage Oak's educational program and organization infrastructure.

LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Sage Oak Charter School
CDS Code: 36-67736-0136069
School Year: 2026-27
LEA contact information:
Krista Woodgrift
Superintendent
kwoodgrift@sageoak.education
888-435-4445

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

Budget Overview for the 2026-27 School Year

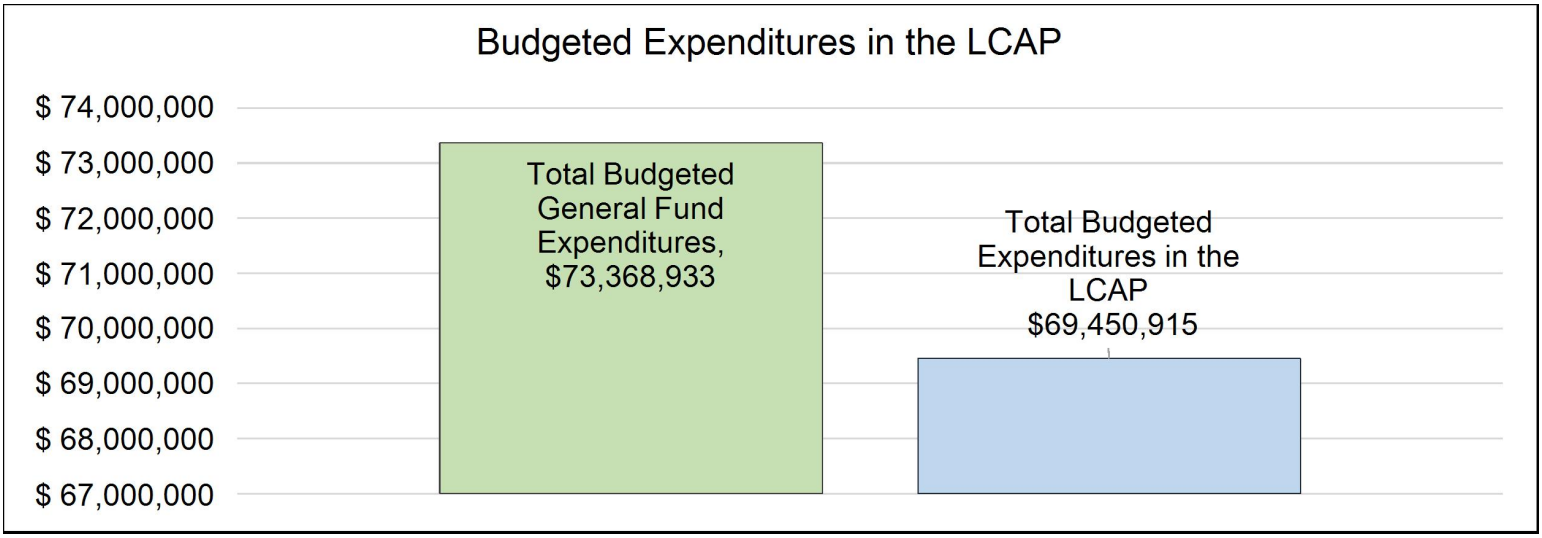


This chart shows the total general purpose revenue Sage Oak Charter School expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Sage Oak Charter School is $74,737,060, of which $62,116,084 is Local Control Funding Formula (LCFF), $10,725,813 is other state funds, $509,562 is local funds, and $1,385,601 is federal funds. Of the $62,116,084 in LCFF Funds, $5,727,140 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Sage Oak Charter School plans to spend for 2026-27. It shows how much of the total is tied to planned actions and services in the LCAP.

The text description of the above chart is as follows: Sage Oak Charter School plans to spend $73,368,933 for the 2026-27 school year. Of that amount, $69,450,915 is tied to actions/services in the LCAP and $3,918,018 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

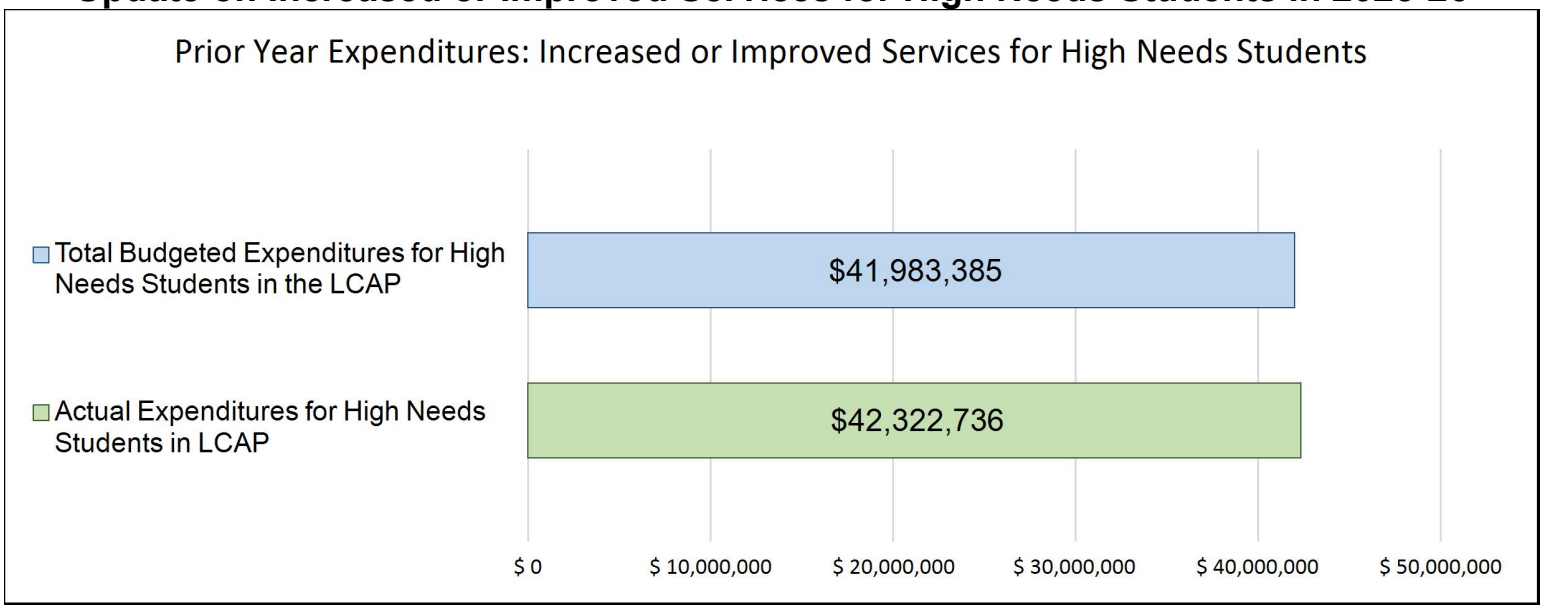
Certain expenditures such as charter oversight fees, human resources administration, legal and compliance services, insurance, rent, and utilities, are necessary operational costs incurred to maintain Sage Oak's educational program and organization infrastructure.

Increased or Improved Services for High Needs Students in the LCAP for the 2026-27 School Year

In 2026-27, Sage Oak Charter School is projecting it will receive $5,727,140 based on the enrollment of foster youth, English learner, and low-income students. Sage Oak Charter School must describe how it intends to increase or improve services for high needs students in the LCAP. Sage Oak Charter School plans to spend $52,051,000 towards meeting this requirement, as described in the LCAP.

LCFF Budget Overview for Parents

Update on Increased or Improved Services for High Needs Students in 2025-26



This chart compares what Sage Oak Charter School budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Sage Oak Charter School estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2025-26, Sage Oak Charter School's LCAP budgeted $41,983,385 for planned actions to increase or improve services for high needs students. Sage Oak Charter School actually spent $42,322,736 for actions to increase or improve services for high needs students in 2025-26.

2026-27 LCFF Budget Overview for Parents Data Input Sheet

Local Educational Agency (LEA) Name:	Sage Oak Charter School- Keppel
CDS Code:	19-64642-0136127
LEA Contact Information:	Name: Krista Woodgrift Position: Superintendent Email: kwoodgrift@sageoak.education Phone: 888-435-4445
Coming School Year:	2026-27
Current School Year:	2025-26

*NOTE: The "High Needs Students" referred to in the tables below are Unduplicated Students for LCFF funding purposes.

Projected General Fund Revenue for the 2026-27 School Year	**Amount** **Whole Numbers**
Total LCFF Funds	$8,306,778
LCFF Supplemental & Concentration Grants	$807,698
All Other State Funds	$1,342,334
All Local Funds	$73,316
All federal funds	$169,088
Total Projected Revenue	$9,891,516

Total Budgeted Expenditures for the 2026-27 School Year	**Amount** **Whole Numbers**
Total Budgeted General Fund Expenditures	$9,710,213
Total Budgeted Expenditures in the LCAP	$9,331,761
Total Budgeted Expenditures for High Needs Students in the LCAP	$7,056,161
Expenditures not in the LCAP	$378,452

Expenditures for High Needs Students in the 2025-26 School Year	**Amount** **Whole Numbers**
Total Budgeted Expenditures for High Needs Students in the LCAP	$4,785,098
Actual Expenditures for High Needs Students in LCAP	$5,591,582

Funds for High Needs Students	**Amount** **[AUTO-CALCULATED]**
2026-27 Difference in Projected Funds and Budgeted Expenditures	$6,248,463
2025-26 Difference in Budgeted and Actual Expenditures	$806,484

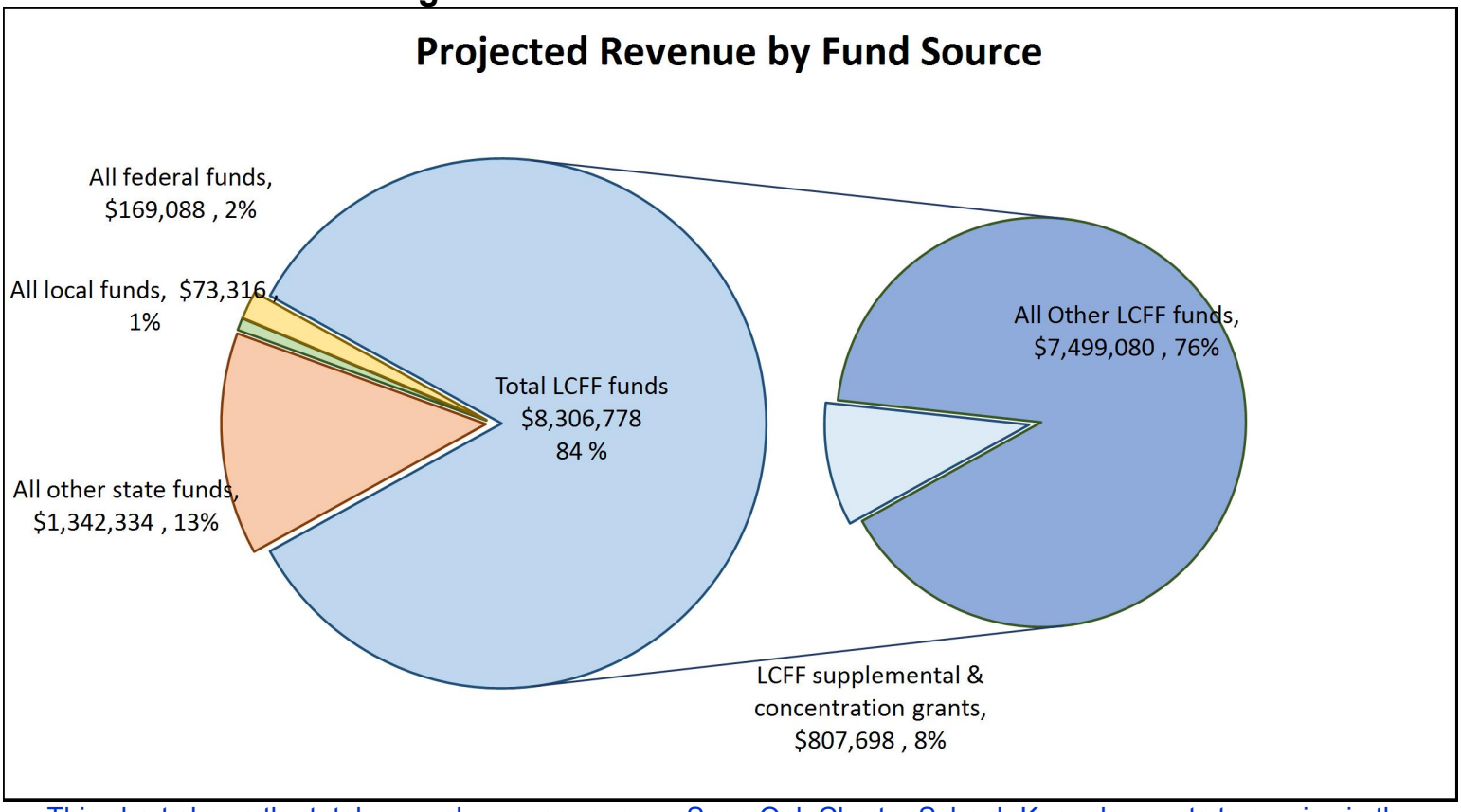
Required Prompts(s)	**Response(s)** **[FIELDS WILL APPEAR IF REQUIRED]**
Briefly describe any of the General Fund Budget Expenditures for the school year not included in the Local Control and Accountability Plan (LCAP).	Certain expenditures such as charter oversight fees, human resources administration, legal and compliance services, insurance, rent, and utilities, are necessary operational costs incurred to maintain Sage Oak's educational program and organization infrastructure.

LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Sage Oak Charter School- Keppel
CDS Code: 19-64642-0136127
School Year: 2026-27
LEA contact information:
Krista Woodgrift
Superintendent
kwoodgrift@sageoak.education
888-435-4445

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

Budget Overview for the 2026-27 School Year

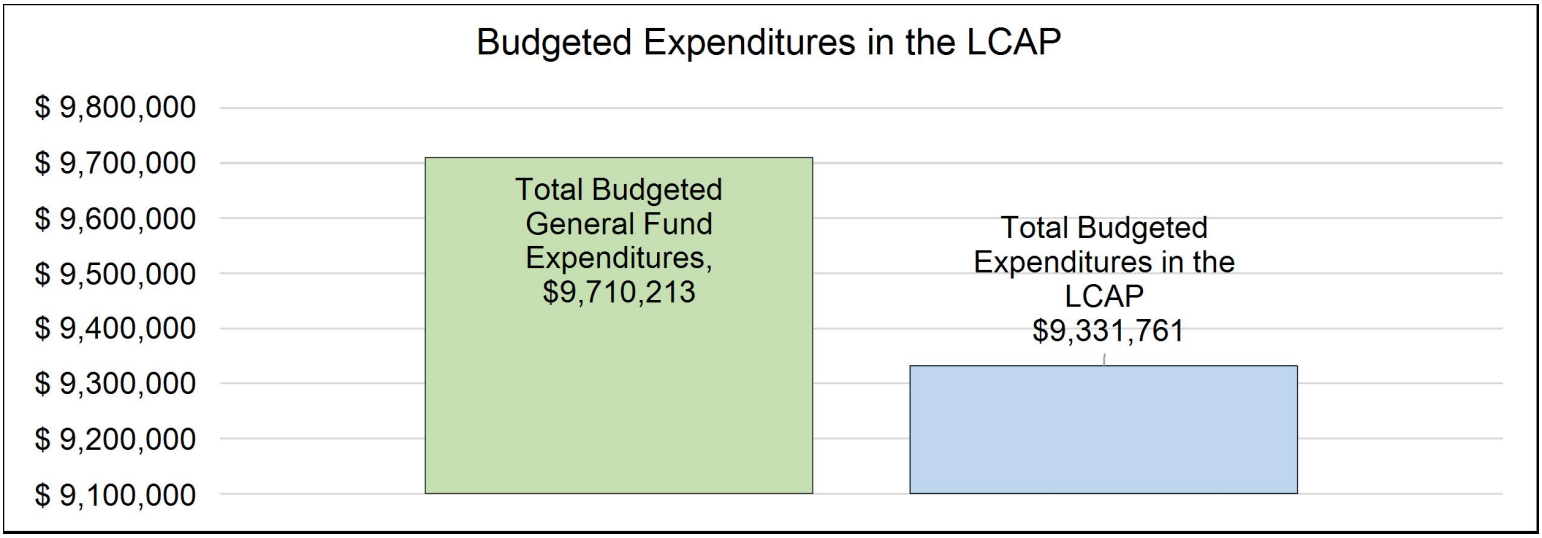


This chart shows the total general purpose revenue Sage Oak Charter School- Keppel expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Sage Oak Charter School-Keppel is $9,891,516, of which $8,306,778 is Local Control Funding Formula (LCFF), $1,342,334 is other state funds, $73,316 is local funds, and $169,088 is federal funds. Of the $8,306,778 in LCFF Funds, $807,698 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Sage Oak Charter School- Keppel plans to spend for 2026-27. It shows how much of the total is tied to planned actions and services in the LCAP.

The text description of the above chart is as follows: Sage Oak Charter School- Keppel plans to spend $9,710,213 for the 2026-27 school year. Of that amount, $9,331,761 is tied to actions/services in the LCAP and $378,452 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

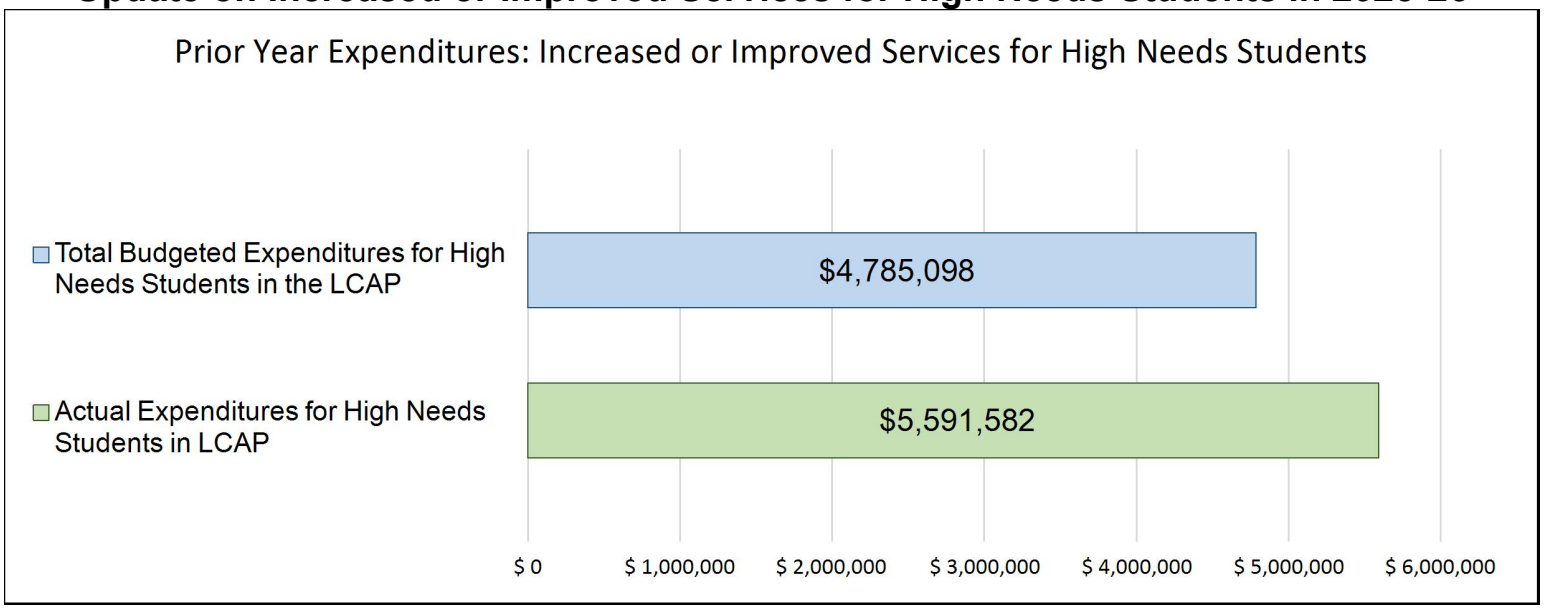
Certain expenditures such as charter oversight fees, human resources administration, legal and compliance services, insurance, rent, and utilities, are necessary operational costs incurred to maintain Sage Oak's educational program and organization infrastructure.

Increased or Improved Services for High Needs Students in the LCAP for the 2026-27 School Year

In 2026-27, Sage Oak Charter School- Keppel is projecting it will receive $807,698 based on the enrollment of foster youth, English learner, and low-income students. Sage Oak Charter School- Keppel must describe how it intends to increase or improve services for high needs students in the LCAP. Sage Oak Charter School- Keppel plans to spend $7,056,161 towards meeting this requirement, as described in the LCAP.

LCFF Budget Overview for Parents

Update on Increased or Improved Services for High Needs Students in 2025-26



This chart compares what Sage Oak Charter School- Keppel budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Sage Oak Charter School- Keppel estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2025-26, Sage Oak Charter School- Keppel's LCAP budgeted $4,785,098 for planned actions to increase or improve services for high needs students. Sage Oak Charter School- Keppel actually spent $5,591,582 for actions to increase or improve services for high needs students in 2025-26.

2026-27 LCFF Budget Overview for Parents Data Input Sheet

Local Educational Agency (LEA) Name:	Sage Oak Charter School- South
CDS Code:	37-75416-0139378
LEA Contact Information:	Name: Krista Woodgrift Position: Superintendent Email: kwoodgrift@sageoak.education Phone: 888-435-4445
Coming School Year:	2026-27
Current School Year:	2025-26

*NOTE: The "High Needs Students" referred to in the tables below are Unduplicated Students for LCFF funding purposes.

Projected General Fund Revenue for the 2026-27 School Year	**Amount** **Whole Numbers**
Total LCFF Funds	$10,358,376
LCFF Supplemental & Concentration Grants	$845,122
All Other State Funds	$1,648,580
All Local Funds	$230,236
All federal funds	$189,924
Total Projected Revenue	$12,427,116

Total Budgeted Expenditures for the 2026-27 School Year	**Amount** **Whole Numbers**
Total Budgeted General Fund Expenditures	$12,194,366
Total Budgeted Expenditures in the LCAP	$11,719,002
Total Budgeted Expenditures for High Needs Students in the LCAP	$8,940,537
Expenditures not in the LCAP	$475,364

Expenditures for High Needs Students in the 2025-26 School Year	**Amount** **Whole Numbers**
Total Budgeted Expenditures for High Needs Students in the LCAP	$6,365,943
Actual Expenditures for High Needs Students in LCAP	$7,461,661

Funds for High Needs Students	**Amount** **[AUTO-CALCULATED]**
2026-27 Difference in Projected Funds and Budgeted Expenditures	$8,095,415
2025-26 Difference in Budgeted and Actual Expenditures	$1,095,718

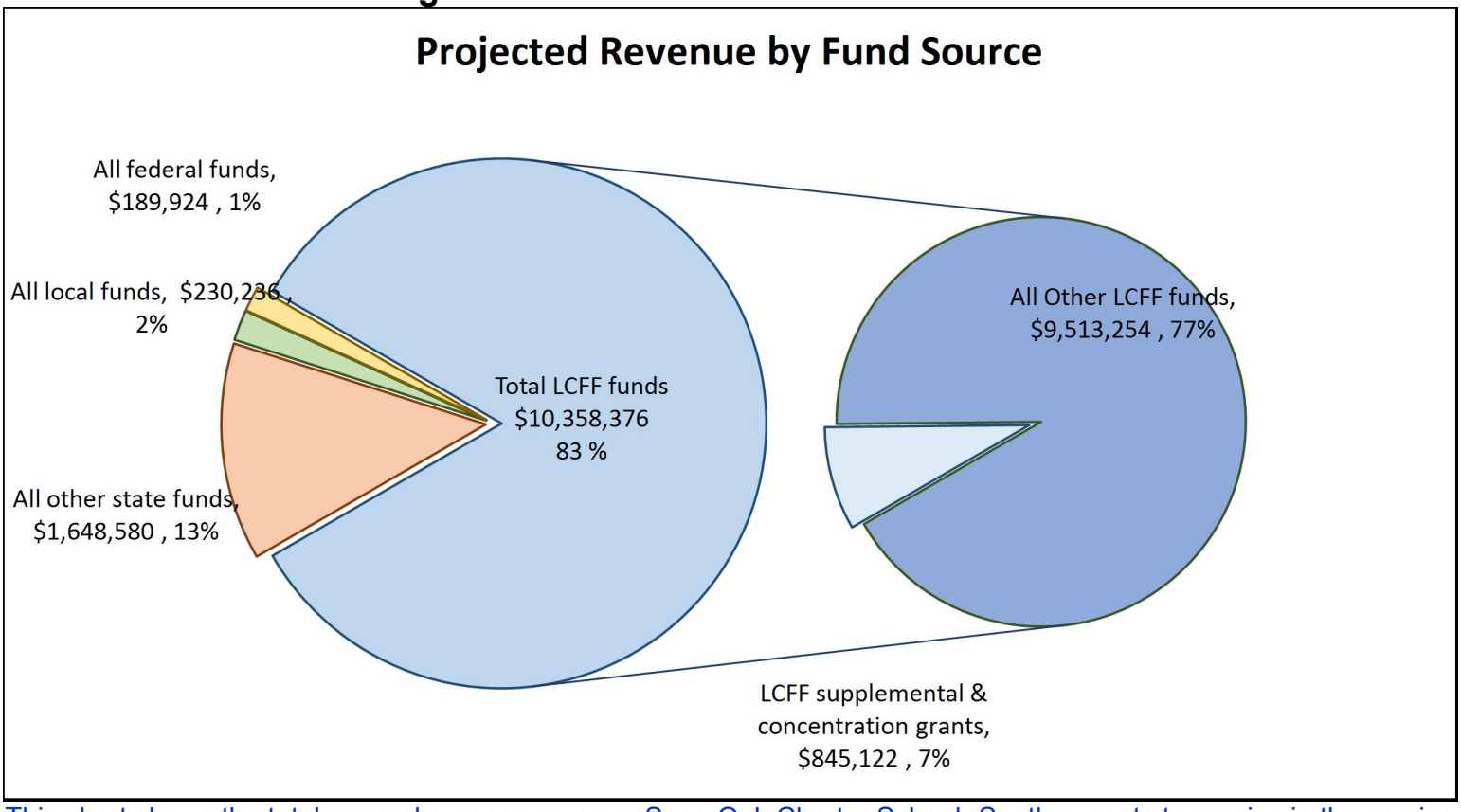
Required Prompts(s)	**Response(s)** **[FIELDS WILL APPEAR IF REQUIRED]**
Briefly describe any of the General Fund Budget Expenditures for the school year not included in the Local Control and Accountability Plan (LCAP).	Certain expenditures such as charter oversight fees, human resources administration, legal and compliance services, insurance, rent, and utilities, are necessary operational costs incurred to maintain Sage Oak's educational program and organization infrastructure.

LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Sage Oak Charter School- South
CDS Code: 37-75416-0139378
School Year: 2026-27
LEA contact information:
Krista Woodgrift
Superintendent
kwoodgrift@sageoak.education
888-435-4445

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

Budget Overview for the 2026-27 School Year

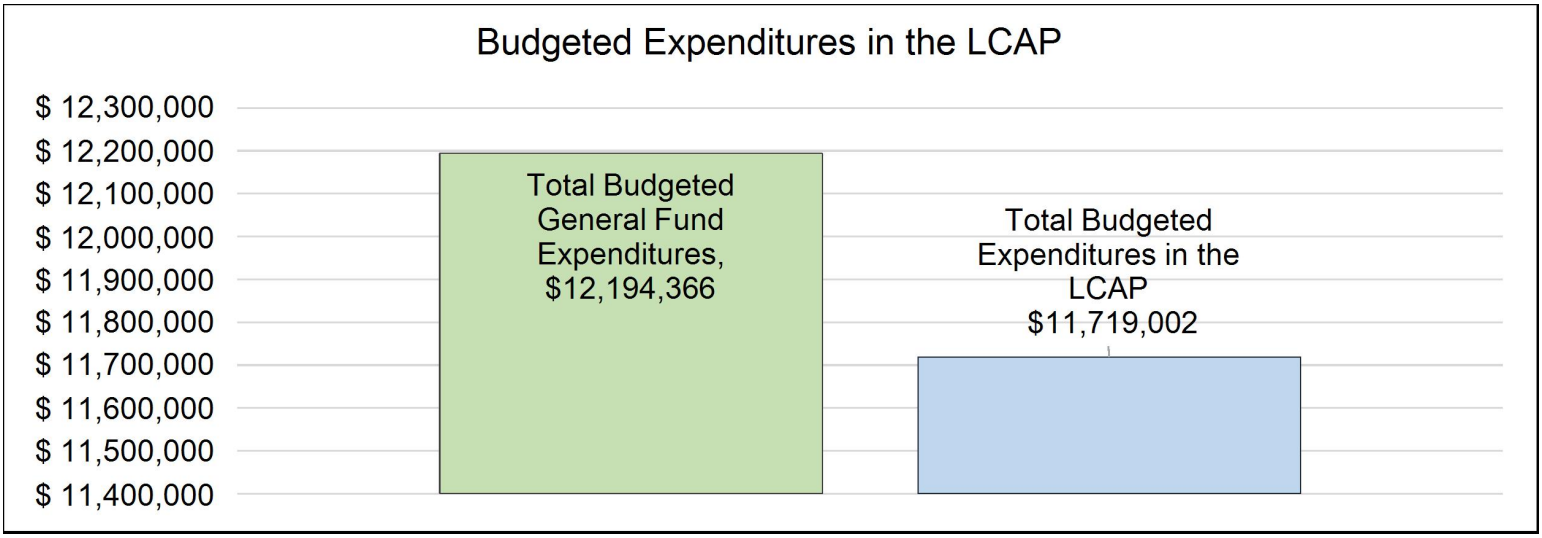


This chart shows the total general purpose revenue Sage Oak Charter School- South expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Sage Oak Charter School- South is $12,427,116, of which $10,358,376 is Local Control Funding Formula (LCFF), $1,648,580 is other state funds, $230,236 is local funds, and $189,924 is federal funds. Of the $10,358,376 in LCFF Funds, $845,122 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Sage Oak Charter School- South plans to spend for 2026-27. It shows how much of the total is tied to planned actions and services in the LCAP.

The text description of the above chart is as follows: Sage Oak Charter School- South plans to spend $12,194,366 for the 2026-27 school year. Of that amount, $11,719,002 is tied to actions/services in the LCAP and $475,364 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

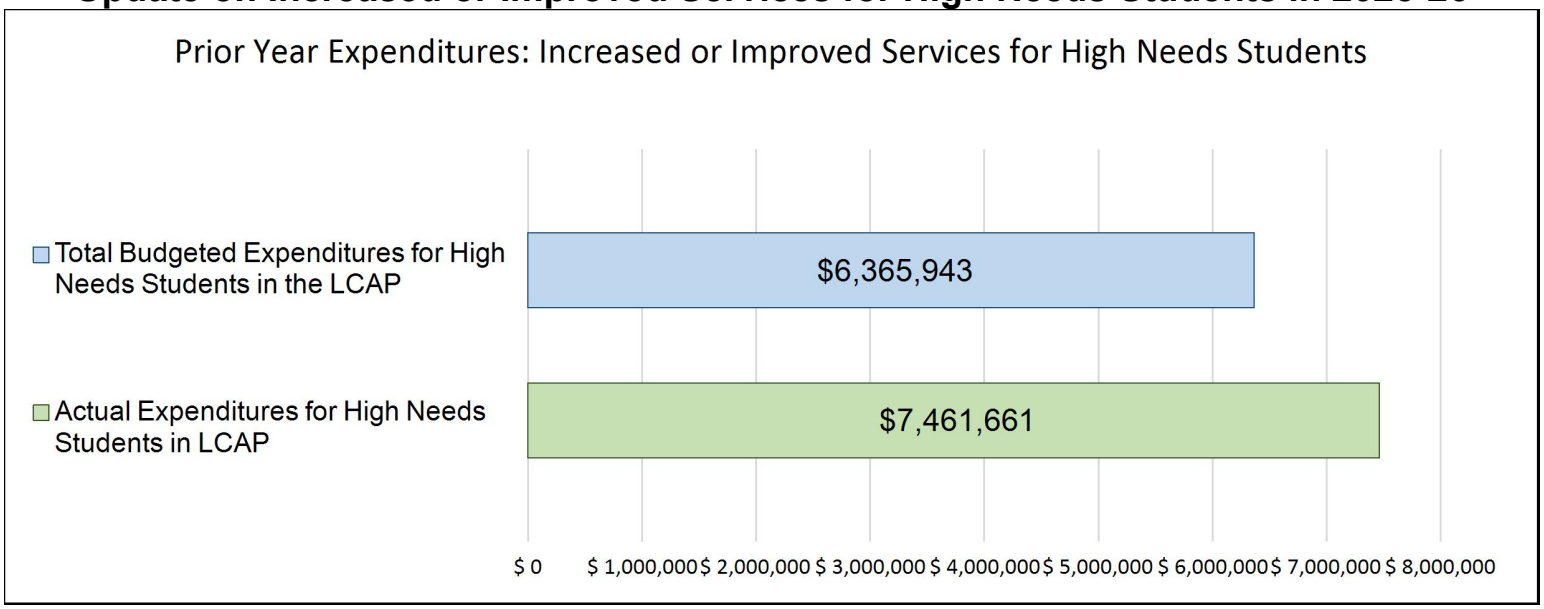
Certain expenditures such as charter oversight fees, human resources administration, legal and compliance services, insurance, rent, and utilities, are necessary operational costs incurred to maintain Sage Oak's educational program and organization infrastructure.

Increased or Improved Services for High Needs Students in the LCAP for the 2026-27 School Year

In 2026-27, Sage Oak Charter School- South is projecting it will receive $845,122 based on the enrollment of foster youth, English learner, and low-income students. Sage Oak Charter School- South must describe how it intends to increase or improve services for high needs students in the LCAP. Sage Oak Charter School- South plans to spend $8,940,537 towards meeting this requirement, as described in the LCAP.

LCFF Budget Overview for Parents

Update on Increased or Improved Services for High Needs Students in 2025-26



This chart compares what Sage Oak Charter School- South budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Sage Oak Charter School- South estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2025-26, Sage Oak Charter School- South's LCAP budgeted $6,365,943 for planned actions to increase or improve services for high needs students. Sage Oak Charter School-South actually spent $7,461,661 for actions to increase or improve services for high needs students in 2025-26.

EDUCATION PROTECTION ACCOUNT - SPENDING DETERMINATION

State law requires that our charter school make a specific determination of how Education Protection Account monies are received and spent. These funds may not be expended on administrative costs. Our practice is to expend 100% of all Education Protection Account monies on teacher salaries, to ensure that 100% of spending is instructionally-related and is not spent for administrative uses.

The table on the following page shows the historical and projected revenues and expenditures of Education Protection Account dollars, from the most recent audited fiscal year through the upcoming budget year.

This document shall be approved by the School's Governing Board as part of the approval of the annual budget in June, and a copy of the approved document shall be posted on the School's website.

Below is the actual law relating to this requirement:

Article XIII, Section 36, Subdivision (e), Paragraph (6) of the California Constitution:
(6) A community college district, county office of education, school district, or charter school shall have sole authority to determine how the moneys received from the Education Protection Account are spent in the school or schools within its jurisdiction, provided, however, that the appropriate governing board or body shall make these spending determinations in open session of a public meeting of the governing board or body and shall not use any of the funds from the Education Protection Account for salaries or benefits of administrators or any other administrative costs. Each community college district, county office of education, school district, and charter school shall annually publish on its Internet Web site an accounting of how much money was received from the Education Protection Account and how that money was spent.

EDUCATION PROTECTION ACCOUNT - EXPENDITURE SUMMARY		
Sage Oak Charter School		
Budgeted Expenditures through: June 30, 2027		
Resource 1400 Education Protection Account		
Description	**Object Codes**	**Amount**
AMOUNT AVAILABLE FOR THIS FISCAL YEAR		
Adjusted Beginning Fund Balance	9791-9795	$0
Education Protection Account Revenue	8010-8099	$934,042
Federal Revenue	8100-8299	$0
Other State Revenue	8300-8599	$0
Other Local Revenue	8600-8799	$0
All Other Financing Sources and Contributions	8900-8999	$0
Deferred Revenue	9650	$0
TOTAL AVAILABLE		$934,042
EXPENDITURES AND OTHER FINANCING USES		
(Objects 1000-7999)		
Instruction	1000-1999	$934,042
Instruction-Related Services		
Instructional Supervision and Administration	2100-2150	$0
AU of a Multidistrict SELPA	2200	$0
Instructional Library, Media, and Technology	2420	$0
Other Instructional Resources	2490-2495	$0
School Administration	2700	$0
Pupil Services		
Guidance and Counseling Services	3110	$0
Psychological Services	3120	$0
Attendance and Social Work Services	3130	$0

Health Services	3140	$0
Speech Pathology and Audiology Services	3150	$0
Pupil Testing Services	3160	$0
Pupil Transportation	3600	$0
Food Services	3700	$0
Other Pupil Services	3900	$0
Ancillary Services	4000-4999	$0
Community Services	5000-5999	$0
Enterprise	6000-6999	$0
General Administration	7000-7999	$0
Plant Services	8000-8999	$0
Other Outgo	9000-9999	$0
TOTAL EXPENDITURES AND OTHER FINANCING USES		$934,042
BALANCE (Total Available minus Total Expenditures and Other Financing Uses)		$0
The portion of EPA revenue expended on instruction (non-administrative)		**100.00%**

EDUCATION PROTECTION ACCOUNT - SPENDING DETERMINATION

State law requires that our charter school make a specific determination of how Education Protection Account monies are received and spent. These funds may not be expended on administrative costs. Our practice is to expend 100% of all Education Protection Account monies on teacher salaries, to ensure that 100% of spending is instructionally-related and is not spent for administrative uses.

The table on the following page shows the historical and projected revenues and expenditures of Education Protection Account dollars, from the most recent audited fiscal year through the upcoming budget year.

This document shall be approved by the School's Governing Board as part of the approval of the annual budget in June, and a copy of the approved document shall be posted on the School's website.

Below is the actual law relating to this requirement:

Article XIII, Section 36, Subdivision (e), Paragraph (6) of the California Constitution:
(6) A community college district, county office of education, school district, or charter school shall have sole authority to determine how the moneys received from the Education Protection Account are spent in the school or schools within its jurisdiction, provided, however, that the appropriate governing board or body shall make these spending determinations in open session of a public meeting of the governing board or body and shall not use any of the funds from the Education Protection Account for salaries or benefits of administrators or any other administrative costs. Each community college district, county office of education, school district, and charter school shall annually publish on its Internet Web site an accounting of how much money was received from the Education Protection Account and how that money was spent.

EDUCATION PROTECTION ACCOUNT - EXPENDITURE SUMMARY		
Sage Oak Charter School - South		
Budgeted Expenditures through: June 30, 2027		
Resource 1400 Education Protection Account		

Description	**Object Codes**	**Amount**
AMOUNT AVAILABLE FOR THIS FISCAL YEAR		
Adjusted Beginning Fund Balance	9791-9795	$0
Education Protection Account Revenue	8010-8099	$154,136
Federal Revenue	8100-8299	$0
Other State Revenue	8300-8599	$0
Other Local Revenue	8600-8799	$0
All Other Financing Sources and Contributions	8900-8999	$0
Deferred Revenue	9650	$0
TOTAL AVAILABLE		$154,136
EXPENDITURES AND OTHER FINANCING USES		
(Objects 1000-7999)		
Instruction	1000-1999	$154,136
Instruction-Related Services		
Instructional Supervision and Administration	2100-2150	$0
AU of a Multidistrict SELPA	2200	$0
Instructional Library, Media, and Technology	2420	$0
Other Instructional Resources	2490-2495	$0
School Administration	2700	$0
Pupil Services		
Guidance and Counseling Services	3110	$0
Psychological Services	3120	$0
Attendance and Social Work Services	3130	$0

Health Services	3140	$0
Speech Pathology and Audiology Services	3150	$0
Pupil Testing Services	3160	$0
Pupil Transportation	3600	$0
Food Services	3700	$0
Other Pupil Services	3900	$0
Ancillary Services	4000-4999	$0
Community Services	5000-5999	$0
Enterprise	6000-6999	$0
General Administration	7000-7999	$0
Plant Services	8000-8999	$0
Other Outgo	9000-9999	$0
TOTAL EXPENDITURES AND OTHER FINANCING USES		$154,136
BALANCE (Total Available minus Total Expenditures and Other Financing Uses)		$0
The portion of EPA revenue expended on instruction (non-administrative)		**100.00%**

EDUCATION PROTECTION ACCOUNT - SPENDING DETERMINATION

State law requires that our charter school make a specific determination of how Education Protection Account monies are received and spent. These funds may not be expended on administrative costs. Our practice is to expend 100% of all Education Protection Account monies on teacher salaries, to ensure that 100% of spending is instructionally-related and is not spent for administrative uses.

The table on the following page shows the historical and projected revenues and expenditures of Education Protection Account dollars, from the most recent audited fiscal year through the upcoming budget year.

This document shall be approved by the School's Governing Board as part of the approval of the annual budget in June, and a copy of the approved document shall be posted on the School's website.

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EDUCATION PROTECTION ACCOUNT - EXPENDITURE SUMMARY		
Sage Oak Charter School - Keppel		
Budgeted Expenditures through: June 30, 2027		
Resource 1400 Education Protection Account		

Description	**Object Codes**	**Amount**
AMOUNT AVAILABLE FOR THIS FISCAL YEAR		
Adjusted Beginning Fund Balance	9791-9795	$0
Education Protection Account Revenue	8010-8099	$122,090
Federal Revenue	8100-8299	$0
Other State Revenue	8300-8599	$0
Other Local Revenue	8600-8799	$0
All Other Financing Sources and Contributions	8900-8999	$0
Deferred Revenue	9650	$0
TOTAL AVAILABLE		$122,090
EXPENDITURES AND OTHER FINANCING USES		
(Objects 1000-7999)		
Instruction	1000-1999	$122,090
Instruction-Related Services		
Instructional Supervision and Administration	2100-2150	$0
AU of a Multidistrict SELPA	2200	$0
Instructional Library, Media, and Technology	2420	$0
Other Instructional Resources	2490-2495	$0
School Administration	2700	$0
Pupil Services		
Guidance and Counseling Services	3110	$0
Psychological Services	3120	$0
Attendance and Social Work Services	3130	$0

Health Services	3140	$0
Speech Pathology and Audiology Services	3150	$0
Pupil Testing Services	3160	$0
Pupil Transportation	3600	$0
Food Services	3700	$0
Other Pupil Services	3900	$0
Ancillary Services	4000-4999	$0
Community Services	5000-5999	$0
Enterprise	6000-6999	$0
General Administration	7000-7999	$0
Plant Services	8000-8999	$0
Other Outgo	9000-9999	$0
TOTAL EXPENDITURES AND OTHER FINANCING USES		$122,090
BALANCE (Total Available minus Total Expenditures and Other Financing Uses)		$0
The portion of EPA revenue expended on instruction (non-administrative)		**100.00%**