



SEQUOIA GROVE CHARTER ALLIANCE

Sequoia Grove Charter Alliance Regular Board Meeting

Date and Time:

**January 26, 2023
6:00 pm**

Location:

Join Zoom Meeting

<https://sequoiagrove-org.zoom.us/j/84659769547?pwd=WHlvUkpIMVBNempkQ0VYTEF3RkpoUT09>

**Meeting ID: 846 5976 9547
Passcode: 336065**

Agenda:

I. Opening items

- A. Record Attendance
- B. Call the Meeting to Order
- C. Approval of the Agenda
- D. Public Comments
- E. Approval of Minutes
 - a. Meeting 28: Sept 15, 2022
 - b. Meeting 29: December 15, 2022

II. Action Items

- A. Director's Report - Royce
 - a. By the numbers
 - b. Staff Moves
- B. Presentation: Staff Member intro - Royce
- C. Discussion: Finances - Cory
- D. Discussion and Possible Action: Fiscal Policy Handbook - Royce
- E. Discussion and Possible Action: Job Descriptions - Royce

IV. Closing items

- A. Board of Director's Comments & Requests
- B. Announcement of Next Regular Scheduled Board Meeting
- C. Adjourn Meeting

Public Comment Rules: Members of the public may address the Board on agenda or non-agenda items through the teleconference platform, Zoom. Zoom does not require the members of the public to have an account or login. Please either utilize the chat option to communicate to the administrative team of your desire to address the Board or simply communicate orally your desire to address the Board when the Board asks for public comments. Speakers may be called in the order requests are received. Comments are limited to 2 minutes each, with no more than 16 minutes per single topic. If a member of the public utilizes a translator to address the Board, those individuals are allotted 4 minutes each. If the Board utilizes simultaneous translation equipment in a manner that allows the Board to hear the translated public testimony simultaneously, those individuals are allotted 2 minutes each. By law, the Board is allowed to take action only on items on the agenda. The Board may, at its discretion, refer a matter to school staff or calendar the issue for future discussion.

Note: The Governing Board encourages those with disabilities to participate fully in the public meeting process. If you need a disability-related modification or accommodation, including auxiliary aids or services, to participate in the public meeting, please contact the Sequoia Grove Office at (916) 526-3794 at least 48 hours before the scheduled board meeting so every reasonable effort can be made to accommodate you. (Government Code § 54954.2; Americans with Disabilities Act of 1990, § 202 (42 U.S.C. § 12132)).



SEQUOIA GROVE CHARTER ALLIANCE

Sequoia Grove Charter Alliance Regular Board Meeting Minutes

Date and Time:

**September 15, 2022
6:00 pm**

Location:

Agenda:**I. Opening items**

- A. Record Attendance: 6:00 - All members in attendance.
Jason Baldwin, Robert McGuire, Sara Rose Bonetti
- B. Call the Meeting to Order: 6:01 Jason Baldwin Called the meeting to order.
- C. Approval of the Agenda: 6:02
Robert McGuire motioned, Jason Baldwin 2nd: 3 ayes 0 nays
- D. Public Comments: 6:02 - 6:05 – No comments
- E. Approval of Minutes: 6:05
Jason Baldwin motioned, Sara rose Bonetti 2nd: 3 ayes 0 nays

II. Action Items

- A. Director's Report 6:27
Royce Gave an overview of the progress made in August and Sept. The Enrollment team continues to enroll at 100%, the Compliance Team worked through 4,388 documents, The Ordering Team placed 11,949 orders, Library now at 25,896 vols, Account Payable worked through 6362, invoices, Community Partners are now serving 694 vendors. Royce complimented the team on working diligently through a very busy season.

Royce reported that the staff enjoyed an evening together at a RiverCats baseball game. The staff have also begun reading The Nordstrom Way, and discussing in team meetings, and at the staff monthly Rallies, custom service principles.

Royce shared with the Board that they have added one additional Compliance Team member.

Royce reported that the Art is being finalized and he anticipate the wraps to be completed over the holidays

- B. Discussion and Possible Action: Board Structure with removal of Winship: 6:28
Royce presented a Board restructure model suggested by the Member Schools with the removal of Winship, which closed. The recommendation includes 2 seats for Feather River, 2 seats for Clarksville, and one seat for Lakeview.

Jason Baldwin moved to approve the structure, Robert McGuire 2nd: 3 ayes, 0 nays

- C. Discussion and Possible Action: Winship Board Seat: Baldwin: 6:36
With Winship now closed, the Board directed Royce to communicate with Feather River that Jason Baldwin is now available to fill their open seat on the SGCA Board should they desire to appoint him there.

Jason Baldwin motioned to approve, Robert McGuire 2nd: 3 ayes, 0 nays

- D. Discussion and Possible Action: October Board Meetings/ Board Training: 6:38
Royce presented the Board with the invitation from the Member School Boards to join them at their annual Board Training meetings in October, covering Brown Act Training.
Jason Baldwin suggested that if everyone would commit to be at their Member School's meeting, they would move their October meeting to be in conjunction with each of their schools.
Robert McGuire responded, "I Like that. That works."

Jason Baldwin moved that the October Board Meeting would be in conjunction with the Member School's meetings, Sara Rose Bonetti 2nd: 3 ayes, 0 nays

- E. Discussion and Possible Action: Addition of April Board Meeting: 6:45
The Board discussed the addition of an April Board meeting for the purpose of working on Board tasks such as the Vision and Mission statements, and Board goals.
Robert McGuire suggested an earlier start, "maybe 4:30" in order to allow time to work.
Jason motioned to approve the addition of April 27 for the Board work session,
Robert McGuire 2nd: 3 ayes, 0 nays

6:53: Jason motioned to approve an adjusted Board Calendar adding April 27, 2023,
Robert McGuire 2nd: 3 ayes, 0 nays

IV. Closing items

- A. Board of Director's Comments & Requests: 6:54

Jason Baldwin mentioned that it has been good to see a handful of students representing their schools in Cross Country this season.

Robert McGuire mentioned he has enjoyed hearing about the Cross Country team this season, and would like to discuss more club sports, especially those mid-day for homeschool families.

B. Announcement of Next Regular Scheduled Board Meeting: 7:03

Jason Baldwin announced the next Board meeting as December 15

C. Adjourn Meeting 7:03

Jason Baldwin Adjourned the meeting

Prepared By: Royce Gough

Noted By: Board Secretary _____



SEQUOIA GROVE CHARTER ALLIANCE

Sequoia Grove Charter Alliance Regular Board Meeting MINUTES

Date and Time:

December 15, 2022
6:00 pm

Agenda:

I. Opening items

- A. Record Attendance: 6:03
Present: Robert McGuire, Sara Rose Bonetti
Absent: Jason Baldwin
- B. Call the Meeting to Order: 6:04 Robert McGuire called the meeting to order
- C. Approval of the Agenda: 6:04
Sara Rose Bonetti motioned, Robert McGuire 2nd: 2 ayes 0 nays
- D. Public Comments: 6:05 - 6:08 – No comments
- E. Approval of Minutes: 6:08
Royce requested the Minutes for the Sept 15 Board Meeting be presented at next meeting January 27, 2023
Robert McGuire motioned, Sara Rose Bonetti 2nd: 2 ayes 0 nays

II. Action Items

- A. Director's Report: 6:11
Royce presented an overview of the progress the Departments have made this year. Enrollment continues to hold at the 100%+ target for this term. The Compliance Team has touched 81,000+ documents. Ordering has processed 47,000+ orders. Account Payable is processing invoices by "next day." Library Services continues to get many returns on Park Days and has added a new Park Day stop in Oroville, they are continuing to look for ways to expand offerings in Lake County. The Community Partners team has started attending Park Days and meeting Community Partners face to face.

Royce noted the virtual staff Holiday Party will be held on Thursday, December 22 and extended an invitation to the Board.

Robert McGuire commented that it is "great that we are getting good participation with Ski Passes, it's great to see."

Sara Rose Bonetti noted that the Library was stacking up, and asked if there was “any way to encourage families to check the library first, before ordering?”

B. Discussion: Finances: 6:23

Cory presented the financials through October.

Robert McGuire thanked Cory for his “good work.”

C. Discussion and Possible Action: Draft Audit 6:33

Royce presented the draft Audit as prepared by Christy White & Associates.

The Audit had two findings recommending the use of “accrual method” vs. “cash method” and the development of a Fiscal Policy Guide. Cory presented the difference in Budget using Accrual, and noted that although the method used is a preference which varies by auditor, we would be using Accrual moving forward. Royce also noted that the leadership team is working with Procopio on the development of a Fiscal Policy Guide.

Robert McGuire note that the year audited was a start-up year, and it was “impressive we got as close as we did.”

Cory noted that this year the difference in accounting method will make up for the deficit left last year.

Robert McGuire commented “the notes are no surprise to me.”

Robert McGuire motioned to accept the audit, Sara Rose 2nd: 2 ayes, 0 nays

D. Discussion: Draft Fiscal Policy 6:47

Awaiting draft comments from Procopio, Royce asked to push this item to the next Board Meeting.

Robert McGuire motioned to approve, Sara Rose 2nd: 2 ayes, 0 nays

**** Noted:** it was noticed that items E and F were inadvertently presented out of order.
6:57 Robert McGuire motioned to amend the order of the Agenda to reflect this change, Sara Rose Bonetti 2nd: 2 ayes, 0 nays

E. Discussion and Possible Action: Calendar update January 2 (Federal holiday): **6:57**

Royce presented the current staff calendar for a slight adjustment, identifying January 2nd as the official Federal holiday which was missed when the calendar was created.

Sara Rose Bonetti motioned to approve the calendar, Robert McGuire 2nd 2 ayes, 0 nays

F. Discussion and Possible Action: Bylaws update: Removal of Winship **6:49**

Royce presented the updated Bylaws previously discussed which remove the closed Winship Charter School, and restructure the membership format of the Board to allow for 2 seats for Clarksville, 2 seats for Feather River, and 1 seat for Lake View.

Sara Rose Bonetti motioned to approve the amended Bylaws
Robert McGuire 2nd : 2 ayes, 0 nays

G. Discussion and Possible Action: Draft Service Agreement 2023/24 6:58

Royce presented the Draft Shared Service Agreement which leadership would like to submit to the schools for the 2023/24 school year. Royce noted that they are proposing no changes to the agreement with the single exception of the removal of Human Resources services to the schools, as the schools have hired their own HR staff.

Robert McGuire motioned to approve, Sara Rose 2nd: 2 ayes, 0 nays

IV. Closing items

A. Board of Director's Comments & Requests: 7:04

Robert McGuire commented that he "appreciated all the hard work everyone is doing." Sara Rose Bontetti noted that she "agreed."

B. Announcement of Next Regular Scheduled Board Meeting: 7:06

Robert McGuire announced the next Board meeting to be held January 26

C. Adjourn Meeting: 7:09

Robert McGuire adjourned the meeting

Prepared By: Royce Gough

Noted By: Board Secretary _____

Sequoia Grove Charter Alliance

Fiscal Policies & Procedures



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SECTION 1: OVERVIEW AND GENERAL BUSINESS POLICIES

The Board of Directors (“Board”) of Sequoia Grove Charter Alliance (“SGCA”) has reviewed and adopted the following policies and procedures to ensure the effective use of SGCA’s funds to support its mission and to ensure that the funds are budgeted, accounted for, expended, and maintained appropriately.

1. The Board approves financial policies and procedures, delegates administration of the policies and procedures to the Chief Executive Officer (“CEO”), and reviews operations and activities on a regular basis.
2. The CEO has responsibility for all operations and activities related to financial management. In the event an individual is unavailable to perform their duties (e.g., on medical leave) or if the position is vacant, the CEO may designate another appropriately trained staff member to temporarily perform those duties.
3. Financial duties and responsibilities must be separated so that no one employee has sole control authorizing transactions, recording financial transactions, and custody of assets.
4. SGCA will maintain in effect the following principles in its ongoing fiscal management practices to ensure that:
 - a. Expenditures are authorized by and in accord with amounts specified in the Board-adopted budget.
 - b. SGCA’s funds are managed and held in a manner that provides a high degree of protection of SGCA’s assets.
 - c. All transactions are recorded and documented in an appropriate manner.

Authorized Signers

The Board hereby authorizes the following SGCA officers (each an “Authorized Signer”) to execute contracts, purchases, and expenditures, and to endorse checks, drafts, and orders for the payment, withdrawal, or transfer of money in the name of and on behalf of SGCA: the CEO and the Board President, and other officers or officials as the Board may designate from time-to-time.

The above SGCA officer may sign contracts and other documents using an electronic signature (e.g., via DocuSign or a similar program where the signature is capable of verification). Checks approved by the Authorized Signer(s) may be signed using their facsimile signature.

Basis of Accounting

The accounting procedures used by SGCA shall conform to generally accepted accounting principles to ensure accuracy of information and compliance with external standards. SGCA uses the accrual-basis of accounting at year-end, meaning that revenues are recorded when earned, and expenses are recorded when a liability is incurred regardless of when the receipt or payment of cash takes place.

Budget Transfers and Revisions

The CEO may transfer up to \$50,000 from one budget item to another without Board approval, but shall notify the Board of the transfer at a Board meeting. Mid-year changes to the budget that result in total expenses increasing by 10% or total revenue decreasing by 10% will require a revised budget to be approved by the Board.

Banking Arrangements

SGCA will maintain its accounts in a federally insured commercial bank or credit union. Funds will be deposited in non-speculative accounts including federally-insured savings or checking accounts. All checks over \$50,000 must be signed by two Authorized Signers.

Unneeded Property

The CEO shall establish and maintain an inventory of all non-consumable goods and equipment worth over \$5,000 as determined by the CEO. This inventory shall include enough information appropriate for documenting SGCA's assets.

Any unneeded property owned by SGCA may be sold or auctioned by the CEO provided that the CEO engages in due diligence to obtain a reasonable value for SGCA. The sale or auction of property owned by SGCA with a fair market value in excess of \$3,000 must be approved in advance by the Board. SGCA may dispose of unneeded equipment and materials in its possession that are usable for its charitable and educational purposes by donation to another educational support organization or a charter school, school district or other public agency, county free library, nonprofit charitable organization, or to children or adults in California.

The Board will be notified of all known cases of theft, loss, damage or destruction of assets worth over \$5,000 as determined by the CEO.

Fixed Asset Capitalization and Depreciation

SGCA will capitalize and depreciate all assets with a useful life of more than one (1) year and costing \$5,000 or more. All other assets are charged to expense in the year incurred.

Capitalized assets are recorded at cost and depreciated under the straight-line method over their estimated useful lives which can range from:

1. Leasehold Improvement – Lease term or 10 years, whichever is shorter
2. Equipment – 3 years
3. Furniture – 5 years

Repair and maintenance costs that do not extend the useful lives of the assets are charged to expense. The cost of assets sold or retired and related amounts of accumulated depreciation are eliminated from the asset accounts, and any resulting gain or loss is included in the earnings for the year.

No Board Compensation

Board members shall serve without compensation, but may be reimbursed for actual and necessary expenses. Expenses for travel necessary to attend Board meetings and meetings of Board committees need not be approved in advance by the Board. All other expenses shall be approved in advance by the Board.

Fundraising, Grant Solicitation, and Donation Recognition

All fundraising or grant solicitation activities on behalf of SGCA must be approved in advance by the CEO. Acceptance of any non-cash or in-kind donations must be approved by the CEO.

Records Retention

SGCA will retain financial records for a minimum of seven years, or as long as required by applicable law, whichever is longer, including but not limited to transaction ledgers, bank reconciliations, canceled/duplicate checks, payroll records, and any other necessary documentation. Financial records may be retained in tangible and/or electronic format. Tangible records will be shredded at the end of their retention period. Electronic records will be permanently deleted from SGCA's computer systems with assistance from SGCA's information technology staff or vendor. Where duplicate records are involved, both/all copies should be destroyed/deleted. During the retention period, copies of electronic and/or paper records should be stored in a secure location.

General Ledger

All transactions will be posted in an electronic general ledger maintained by SGCA.

Loans

All loans, lines of credit, and other forms of indebtedness incurred by SGCA shall be approved by the Board, regardless of the amount. All loans, lines of credit, and other forms of indebtedness shall be documented in a writing signed by an Authorized Signer that specifies all material terms, including, but not limited to, the amount, the interest rate, and the repayment schedule.

SECTION 2: PROCUREMENT

Objectives

The Board is committed to safeguarding SGCA's funds and promoting transparency and accountability when it comes to the use of its funds. The objectives of these procurement policies are to ensure that SGCA receives high quality and cost effective equipment, materials, supplies, and services in an efficient manner from reputable vendors. Although cost is an important factor, SGCA is not required to select the vendor with the lowest price.

When approving contracts and purchases, SGCA must:

- Determine if the expenditure is budgeted.
- Determine if funds are available for the expenditure.

- Determine if the expenditure is allowable under the appropriate revenue source.
- Determine if the expenditure is appropriate and consistent with SGCA's corporate and charitable purposes, tax exemption, policies and procedures, and any related laws or applicable regulations.
- Determine if the price is reasonable and prudent.
- Comply with all applicable laws, including, but not limited to, any laws related to self-dealing transactions and conflicts of interest.

Approval Threshold

Except as otherwise provided herein, the CEO has authority to approve contracts and purchases up to \$50,000 without Board approval, provided funds are authorized and available within SGCA's adopted budget. Contracts or purchases in excess of \$50,000 must be submitted for Board approval. Approvals from the CEO shall be submitted in writing (e.g., email) or through SGCA's procurement system.

Once a contract is approved, the contract may be executed by an Authorized Signer or another person specifically designated by the Board at the time the contract was approved.

Notwithstanding the approval threshold, any purchase, sale, lease, or transfer of real property on behalf of SGCA, with a fair market value in excess of \$3,000, must be approved by the Board, and will be evidenced by a written agreement identifying all the material terms and conditions of the transaction.

Notwithstanding the approval threshold, Board approval is not required for:

- Employment contracts (except Board approval is required for the CEO's employment contract).
- Contracts or purchases in an "emergency" situation. "Emergency" is defined as work stoppage, threat of financial loss, or other situations that impair the health, welfare, and safety of staff or SGCA property. Such contracts/purchases must be accompanied by a memo noting the urgency of the contract/purchase and the justification, must be approved by the CEO, and must be reported to the Board.

Purchase and Contract Amounts

For purposes of the approval threshold (i.e., whether a contract must be approved by the Board), the "total" for a one-time purchase includes all taxes, shipping charges, and fees. Sometimes, multiple one-time purchases are made from the same vendor over time. It is within the discretion of the CEO whether to aggregate such purchases, taking into account the objectives of these procurement policies.

For purposes of the approval threshold, the "total" for a fixed price is the total amount to be paid under the contract (e.g., for a three-year contract for \$40,000/year, the total amount to be paid is \$120,000 so Board approval is required).

For contracts where the total amount to be paid cannot be determined upfront (e.g., contracts for certain ongoing services), the "total" for purposes of the approval threshold depends on, in the judgment of the CEO, how much SGCA reasonably expects to pay under the contract each fiscal year. For

any such contract, if SGCA ends up paying more than \$50,000 in a fiscal year, the contract shall be brought to the Board for ratification.

Bidding; Estimates

Bids or estimates will be obtained by SGCA where required by law or otherwise deemed by the CEO to be appropriate and in the best interests of SGCA.

SECTION 3: ACCOUNTS PAYABLE

Petty Cash

SGCA will not maintain petty cash.

Purchase Orders

SGCA will develop and maintain purchase order ("PO") forms to document the authorization of non-payroll expenditures. All non-recurring purchases require the use of a PO except when the vendor does not accept a PO or it would otherwise be impractical, as determined by the CEO.

Invoice Processing

The Director of Business will carefully review each invoice, review all supporting documentation (e.g., PO, contract, etc.), and verify that the specified services and/or goods were received. When receiving tangible goods from a vendor, the person designated to receive deliveries should review the packing list and note any items that were not in the shipment. The Director of Business will also verify that SGCA has accurate supporting documentation for any requests for expense reimbursements.

All invoices must be approved by the CEO and then the Director of Business will process the checks. If SGCA is experiencing cash flow issues, the CEO will be notified and will advise whether to hold or release the checks. The Director of Business will maintain a Check Register. All checks will be distributed directly to the payee.

The CEO may authorize the Director of Business to pay recurring expenses (e.g. utilities) without the CEO's approval of individual invoices when dollar amounts fall within a predetermined range. A list of the vendors and the dollar range for each vendor must be provided to the Director of Business in writing and updated on an annual basis.

Individual Check Requests

When there is a need to generate an individual check, SGCA will send appropriate documentation to the Director of Business (e.g., a check request form). Once the check request has been approved by the CEO, the Director of Business will prepare the check. Checks may not be written to cash or bearer. Under no circumstance will any individual sign a blank check.

The Director of Business will distribute the check directly to the payee, or to the CEO upon approval from the Board President.

Voided checks will have the signature line cut out and will have "VOID" written in ink. The original check will be retained by the Director of Business, who will attach any related documentation as appropriate.

Bank Reconciliations

Bank reconciliations will occur on a monthly basis. The reconciliation process ensures that transactions in the bank statement, such as bank fees and interest earnings, are recorded in the general ledger; ensures that checks and deposit amounts agree between the bank statement and the general ledger; and ensures that the checks and deposits that are recorded in the general ledger but have not yet cleared the bank account are identified.

Once the monthly bank statement is received, the Director of Business will prepare the monthly bank reconciliation by comparing the transactions in the general ledger to the bank statement. Any discrepancies will be immediately reported to the CEO, and the Director of Business will help facilitate any investigation of discrepancies as appropriate.

Any checks issued by SGCA that remain uncleared for ninety (90) days will be investigated. SGCA should either stop payment on the check or follow-up with the recipient until the check is deposited.

Credit Cards

The Board recognizes the value of a credit card as an efficient method of purchasing authorized goods, supplies, and services when using a check or purchase order is not practical or possible. However, use of SGCA credit cards is not intended to replace effective procurement planning or transactions that should be handled through purchase orders, checks, or other approved methods.

The Board hereby authorizes the following SGCA official(s) to be issued a SGCA credit card: the CEO and the Director of Business (each an "Authorized Cardholder"). The list of Authorized Cardholders will be reviewed and updated periodically as necessary to reflect current circumstances. The CEO may permit non-Authorized Cardholders to use a SGCA credit card from time to time in accordance with the procedures herein. SGCA credit cards will bear the names of both SGCA and the Authorized Cardholder.

The credit limit for all SGCA credit cards is currently \$50,000 in the aggregate. Any increases in the credit limit must be approved by the Board. The Board designates the CEO as custodian of SGCA credit cards. Use of SGCA credit cards is a privilege that may be revoked by the CEO or the Board at any time. Violation of this policy may result in the revocation of credit card use privileges and/or discipline up to and including termination.

The SGCA credit card will be kept under the supervision of the Authorized Cardholder. A credit card may only be checked out by a non-Authorized Cardholder for use after a written request has been submitted to the CEO describing the nature of the item(s) to be charged, estimated amount(s) to be charged, the date(s) of the requested credit card use, and the date the credit card will be returned. Credit cards should generally be returned by a non-Authorized Cardholder within one (1) business day after the requested use. Or, if traveling with the credit card, within one (1) business day of their return. Authorized Cardholders may carry their SGCA-issued credit card with them at all times.

All SGCA credit card users must take proper care of the card and take all reasonable precautions against damage, loss, or theft. Card numbers and information should be kept confidential and secure. If a SGCA credit card is lost or stolen, the appropriate user must report the loss or theft to the CEO immediately.

upon discovery. If the CEO loses or has a credit card stolen, he/she must report the loss or theft to the Board President immediately upon discovery.

An itemized receipt shall be turned into divvy online for all purchases indicating the date, amount, and description of each expense. Card users are responsible for retaining all receipts and submitting them to the CEO as soon as reasonably practicable, but no later than ten (10) business days after the transaction. If an itemized receipt is missing, the card user will be responsible for contacting the vendor and acquiring a new receipt. In rare instances when a replacement receipt cannot be acquired from the vendor, a missing receipt form shall be submitted to and approved by the CEO. Should the CEO be required to complete a missing receipt form, approval from the Board President is required.

If itemized receipts are not available, missing, or contain an inappropriate expense, the individual making the charge may be held responsible for payment. No personal charges are permitted on SGCA credit cards.

All reward points or discounts are property of SGCA. Use of such points or discounts is at the discretion of the CEO and must be used for SGCA purposes.

Upon termination of an Authorized Cardholder, the employee shall immediately return the credit card and all receipts to the CEO.

The Director of Business will review and reconcile credit card statements and transactions on a monthly basis and will verify that any items that were purchased were actually received. The CEO or designee will take appropriate action to follow up on any identified discrepancies in a timely manner.

Debit Cards

SGCA debit cards are not permitted. If a SGCA debit card is automatically issued by the bank, the CEO will destroy the physical card and contact the bank to deactivate the card service from the account.

Wire Transfers

Outgoing wire transfers will be executed upon receipt of appropriate documentation (e.g. vendor invoice, purchase order, etc.) and approval from the CEO. Any outgoing wire transfer over \$50,000 must also receive written secondary approval from the Board President. The CEO shall prepare and submit all supporting documentation for the wire transfer to the secondary approver, if applicable for approval. All outgoing wire transfers should be performed in-person at the bank or using the bank's secure website.

SECTION 4: CASH RECEIPT MANAGEMENT

General Procedures for Cash Receipts

For each fundraising or other event in which cash or checks will be collected, the following procedures shall be followed:

1. The CEO will designate a staff member to be responsible for managing the process to collect and secure all cash and checks related to the event.

2. All funds raised shall be counted immediately after the event (i.e., on the same day) by the designee and at least one other person, both of whom shall sign a Cash Count Sheet (or similar documentation attesting to the accuracy of the count).
3. The designee shall give the cash, checks, and Cash Count Sheet to the Director of Business immediately after the event.
4. The Director of Business will recount and reconcile the amount received with the Cash Count Sheet and the Director of Business will sign the Cash Count Sheet attesting to the accuracy of the count. The Director of Business will log the funds in a Cash Receipts Book (or similar documentation) and immediately put the funds in a designated, secure, locked location.
5. All funds shall be deposited in accordance with SGCA's policy for bank deposits set forth herein.

The following are general procedures for handling cash or checks received by SGCA:

1. All checks will be restrictively endorsed immediately upon receipt (e.g., "For Deposit Only").
2. All cash and checks will be placed in a designated, secure, locked location.
3. Upon receipt of a cash or check payment, the payor will be provided with a receipt. The SGCA staff person receiving the cash or check payment will fill out a funds verification form, which must be signed by the SGCA staff person receiving the payment and an additional SGCA staff person as witness. The cash or check payment, a copy of the receipt, and a copy of the funds verification form must be provided to the CEO or Director of Business.
4. The CEO or Director of Business will retain the receipt, funds verification form, and cash or check payment in a secure location.
5. Once the deposit is made, the Director of Business posts it to the general ledger.
6. A returned-check processing fee will be charged for checks returned as non-sufficient funds. The writer of the check is responsible for payment of the returned-check processing fee by cash, money order, or certified check. In the event that a second check is returned for non-sufficient funds for any individual, in addition to payment of the processing fee, the individual may lose check-writing privileges at the discretion of the CEO.

Bank Deposits

The CEO is responsible for making bank deposits. The CEO shall deposit cash and/or checks as soon as reasonably practicable, but no later than three (3) business days after receipt. Prior to deposit, the Director of Business staff will review the cash and/or checks and reconcile the amounts to the receipts and funds verification forms. The CEO will make a copy of each check.

The Director of Business will reconcile the receipts and funds verification forms to the deposit receipts and the bank statement as part of the monthly reconciliation process.

SECTION 5: HUMAN RESOURCES AND PAYROLL

Payroll Services and Setup

SGCA's payroll provider will prepare payroll checks, tax and retirement withholdings, and tax statements, and will perform other payroll support functions. The CEO will establish and oversee a system to ensure accurate and timely preparation of timesheets for hourly employees, and accurate tracking of leaves of absence.

The Director of Business will review payroll statements monthly to ensure that: (1) the salaries are consistent with employee contracts and personnel policies; and (2) the proper tax, retirement, disability, and other withholdings have been deducted and forwarded to the appropriate authority. All staff expense reimbursements will be on checks separate from payroll checks.

Upon hiring of new employees, the Director of Business will be responsible for the creation of a personnel file with all appropriate payroll-related documentation.

Requests for new employees shall be initiated by the CEO or designee and shall be consistent with the annual personnel budget approved by the Board.

Timesheets

All hourly employees will be responsible for completing a timesheet including vacation, sick, and holiday time (if applicable). The employee and their supervisor will approve the completed timesheet. Incomplete timesheets will be returned and late timesheets may be held until the next pay period. No employee will be paid until a correctly completed timesheet is submitted. If an employee is unexpectedly absent and therefore prevented from working the last day of the pay period or turning in the timesheet (e.g., an employee calling in sick), the employee is responsible for notifying their supervisor or for making other arrangements for the timesheet to be completed and submitted.

SGCA's payroll provider will prepare payroll in accordance with SGCA's payroll calendar.

Payroll Taxes and Record Keeping

SGCA's payroll provider will prepare payroll check summaries, tax and withholding summaries, and other payroll tracking summaries based on the reporting submitted. SGCA's payroll provider will also prepare the state and federal quarterly and annual payroll tax forms for income tax withholdings, Social Security, and Medicare and submit the forms to the respective agencies on behalf of SGCA.

The payroll provider will prepare the quarterly state returns for unemployment and disability, review the forms with the CEO, and submit the forms to the state on behalf of SGCA.

SGCA will maintain written records of all full time employees' use of sick leave, vacation pay, and any unpaid time.

Additional Stipends

At the discretion of the CEO or the Board, stipends may be given as a payment for extra duties outside of the typical job description, or to offset expenses associated with tasks or work that is beyond that which is typically expected. Stipends listed can be provided with a signed one page contract with a term listed. Auto stipend is classified as (1) or (2) dependent on the expected mileage and/or regular usage required for the position, (2) being less than 100 miles/week regularly, (1) more than 100 miles/ week regularly.

Approved stipends include:

- Lead position: \$300.00 monthly
- Internet: \$100 monthly
- Phone: \$100 monthly
- Auto (1): \$700 monthly
- Auto (2): \$350 monthly

Expense Reimbursements

SGCA will reimburse employees and Board members for SGCA-related expenses that are reasonable, necessary, accompanied by appropriate documentation, and approved in accordance with SGCA's procurement policies set forth herein. Individuals are strongly encouraged to submit expense reports as soon as possible but no later than thirty (30) calendar days after incurring the expense.

Any individual seeking to make a SGCA-related purchase must obtain approval in accordance with SGCA's procurement policies set forth herein. The individual shall submit an expense report via SGCA's electronic system to the CEO as soon as reasonably practicable after incurring the expense. Appropriate documentation (e.g. itemized receipt, maps for mileage, etc.) must be attached to the expense report. If an itemized receipt is missing, the individuals will be responsible for contacting the vendor and acquiring a new receipt. In rare instances when a replacement receipt cannot be acquired from the vendor, a missing receipt form shall be submitted to and approved by the CEO. Should the CEO be required to complete a missing receipt form, approval from the Board President is required.

Expense reports must be reviewed and approved for payment by the CEO. The CEO's expense reports must be reviewed and approved for payment by a Board member.

SGCA reserves the right to refuse reimbursement for any inappropriate expenses.

Travel Information and Arrangements

When employees travel for company-related purposes, it is SGCA's responsibility to provide safe and reliable travel arrangements. This company travel policy serves to clarify the conditions and parameters of a company-paid trip.

Purpose

The purpose of this company travel policy is to (a) outline the authorization and reimbursement process for travel arrangements and expenses; (b) list the company-paid travel expenses; and (c) establish protocols that oversee the travel arrangement process.

Scope

This company travel policy is applicable to all employees under contract at SGCA including contractors, seasonal, part-time, and full-time employees. SGCA sees traveling out of the city, state, and/or country as a fully-paid business trip, as well as one-day trips when the travel is 'away from home' or worksite for a duration longer than an ordinary day's worth of work (8 hours).

Authorization

All company travel arrangements must be authorized by senior employees at least 2 weeks before the expected travel date, depending on the circumstances and the required travel arrangement time period. Employees are not permitted to authorize their own travel arrangements.

Travel Arrangement

The Business Department is responsible for the booking and payment of all transportation, accommodation, and travel-related expenses. Employees shall not receive reimbursement for using airline or hotel rewards credits (credits, points, etc.) while conducting approved school business. Airline rewards credits do not translate to a cash value to be reimbursed by SGCA.

Travel Expenses

SGCA employees are entitled to a company-paid Coach/Economy Class travel ticket for any means of transportation the employee(s) require, including a return plane, boat, bus, or train ticket. If an employee desires additional travel for personal reasons, they will be financially responsible for the travel fare. SGCA neither compensates or reimburses employees for use of rental cars.

Accommodations/Lodging

The Business Services Department is responsible for securing the hotel room and paying for an employee's stay. SGCA employees shall only use commercial lodging establishments such as hotels and motels while traveling for company purposes. Accommodations/Lodging requests are approved for event days only. Separate reservations must be made by the employee at their own expenses if the employee intends to stay for additional days.

Meals & Incidentals

SGCA employees will be compensated for up to three daily meals in accordance with the IRS Per Diem Rates for FY 2022. For trips of four or more days including travel time, SGCA will pay the cost of one article of luggage/baggage. Employees will be reimbursed for their transportation to and from the hotel or motel such as a taxi/UBER/LYFT, including the cost of any gratuity or tip for each trip equaling 15%. For reimbursement, the employee must provide the Director of Business Services with all receipts for the aforementioned transportation within 30 days of the conclusion of the trip. If the employee is using their own personal vehicle for travel, the employee will be reimbursed at the current IRS rate.

Per Diem Rate for Meals & Incidentals

Whenever possible, SGCA will provide the employee with their Per Diem prior to travel. The Per Diem is intended to cover all meals and incidental expenses inclusive of gratuity or tip. The SGCA Per Diem Rates for FY 2022 are as follows:

Travel/Event Days: \$60

Alcoholic Beverages

SGCA employees shall not receive compensation or reimbursement for purchasing alcoholic beverages while conducting approved SGCA business.

Personal Expenses

SGCA will not be financially responsible for any personal expenses and travel arrangements. If an employee chooses to travel with a partner, SGCA is not responsible for their partner's accommodation, leisure, and/or travel expenses.

Driving on Company Business

This guidance applies to all SGCA employees who drive for company business — either a company-owned vehicle, or their personal vehicle.

Driver's License

All SGCA employees must have a valid driver's license to drive for company business and are expected to follow all local, state, and federal driving requirements.

Insurance Coverage

Most states' laws require the vehicle owner's insurance to be the primary coverage, not the company's, so if you're driving your own car, you must be sure that you carry personal auto insurance to comply with state insurance requirements. Consult your personal insurance agent to ensure that your coverage is adequate for your protection.

Traffic Citations

Employees are responsible for payment and resolution of any speeding tickets or other traffic or parking citations they may receive while driving for company business. Employees are expected to comply with all applicable traffic rules and regulations, avoid distractions, and practice defensive driving skills. Mobile phones and other devices should not be used when driving on company business.

SECTION 6: FINANCIAL REPORTING**Budget Development and Monitoring**

In consultation with the CEO, the Director of Business will prepare the annual budget for approval by the Board prior to the start of each fiscal year. The annual budget is meant to be an accurate reflection of programmatic and infrastructure goals for the coming year.

Annual Financial Audit

SGCA shall annually contract for the services of an independent certified public accountant to perform an annual fiscal audit. The audit shall include, but not be limited to, an audit of the accuracy of SGCA's financial statements and review of SGCA's internal controls over financial reporting. The audit shall be completed, and reviewed by the Board, prior to December 15 of each year.

Regular Financial Reporting

The Director of Business will prepare and submit the following quarterly financial reports to SGCA, which will be reviewed at a Board meeting:

- a. Statement of Financial Position
- b. Statement of Activities by Period

The Director of Business will regularly prepare and submit a budget vs. actuals report to SGCA, which will be reviewed at a Board meeting.

Fund Balance Reserve

A cash reserve will be maintained by SGCA at an appropriate level as determined by the Board (or as approved by its members). The Director of Business will provide the CEO with a Statement of Financial Position on a monthly basis. It is the responsibility of the CEO and the Board to monitor SGCA's cash situation. It is the responsibility of the CEO to prioritize payments as needed.



Office Receptionist	
Job Title	Office Receptionist
Direct Report	Senior Director of Business Services
FLSA Status	Non-exempt
Position Type	Full Time, M-F, 7:30AM to 4:00PM
Salary Schedule	Schedule A
Classification	Classified
Board Approved	5/2021, 4/25/2022
Revised	2/27/2022

**NOTE: Part-time positions are subject to an increase or decrease in hours according to school needs. Salary is prorated depending upon % of contract*

SUMMARY OF POSITION

Under the supervision of the Chief Executive Officer or administrative designee, the Office Receptionist will greet, assist, and provide direction and information to clients, visitors, and other guests of the organization.

REPRESENTATIVE DUTIES

Employees may perform any combination of the essential functions shown below. This position description is not intended to be an exhaustive list of all duties, knowledge or abilities associated with this classification, what is intended is to accurately reflect the principal job elements.

ESSENTIAL FUNCTIONS

- Greets clients, visitors, and guests; determines the purpose of each person's visit and directs or escorts him or her to the appropriate location.
- Answers, screens, and directs phone calls to staff; takes messages and schedules appointments.
- Receives mail, documents, packages, and courier deliveries and delivers or distributes items.
- Performs administrative and clerical support tasks.
- Performs basic filing and recordkeeping.
- Performs other duties.
- Other duties as assigned

REQUIRED SKILLS/ABILITIES

- Attention to detail and accuracy; excellent organizational, analytical and problem-solving skills.
- Ability to maintain accurate records and uphold confidentiality at all times.
- Ability to gather information and prepare reports.
- Ability to adhere to timelines.
- Ability to work collaboratively and tactfully with others.
- Strong verbal and written communication skills.
- Innovative and resourceful problem solving skills.
- Proficiency with computers and software including Google Suite, Word, Excel, ZOOM, and standard office equipment (e.g., copy machine).

EDUCATION/EXPERIENCE

- High school diploma or equivalent required.

WORK ENVIRONMENT/PHYSICAL DEMANDS

Outdoor and Indoor environments. Driving in various road and weather conditions; Office Environment - Work involves sitting most of the work day greater than 50% of the time. Typing and applying pressure with the fingers and palm required. Substantial repetitive movements (motions) of the wrists, hands, and/or fingers. Required to have close visual acuity to perform an activity such as: preparing and analyzing data and figures; transcribing; viewing a computer terminal; reading, primarily on a computer monitor. Occasional travel required for offsite meetings and events. Normally less than 10% of the time. Must be able to lift up to 40 lbs.

Potential Hazards: Traffic hazards and exposure to fuels, exhaust, and fumes from fluid used in the operation of equipment; exposure to chemical compounds used to clean equipment; exposure to surfaces of engine components being very hot, oily, and greasy.

**Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.*

EOE STATEMENT

Sequoia Grove Charter Alliance is an equal opportunity employer that is committed to diversity and inclusion in the workplace. We prohibit discrimination and harassment of any kind based on race, color, sex, religion, sexual orientation, national origin, disability, genetic information, pregnancy, or any other protected characteristic as outlined by federal, state, or local laws. This policy applies to all employment practices within our organization, including hiring, recruiting, promotion, termination, layoff, recall, leave of absence, compensation, benefits, training, and apprenticeship. Sequoia Grove Charter Alliance makes hiring decisions based solely on qualifications, merit, and business needs at the time.

ADDITIONAL REQUIREMENTS

DOJ fingerprint Clearance

Internal Professional Development/Training

Signature (Sequoia Grove Charter Alliance Representative)

Date

Employee

Date



Executive Assistant	
Job Title	Executive Assistant
Direct Report	CEO or Administrative Designee
FLSA Status	Non-Exempt
Position Type	Full Time, M-F, 7:30AM to 4:00PM
Salary Schedule	Schedule B
Classification	Classified
Board Approved	1/26/2023
Revised	NA

**NOTE: Part-time positions are subject to an increase or decrease in hours according to school needs. Salary is prorated depending upon % of contract*

SUMMARY OF POSITION

The Executive Assistant will provide administrative assistance and perform complex and highly specialized duties for the Chief Executive Officer including planning, coordinating, and participating in the administrative operations inherent to the assignment.

REPRESENTATIVE DUTIES

Employees may perform any combination of the essential functions shown below. This position description is not intended to be an exhaustive list of all duties, knowledge or abilities associated with this classification, what is intended is to accurately reflect the principal job elements.

ESSENTIAL FUNCTIONS

- Provides high-level administrative support and assistance to the Chief Executive Officer and/or other assigned leadership staff.
- Performs clerical and administrative tasks including drafting letters, memos, invoices, reports, and other documents for senior staff.
- Schedules and attends meetings on behalf of the Chief Executive Officer, taking notes and recording minutes.
- Receives incoming communication or memos on behalf of senior staff, reviews contents, determines importance, and summarizes and/or distributes contents to appropriate staff.
- Performs office tasks including maintaining records, ordering supplies, and performing basic bookkeeping.

- Handle regular and routine questions and requests concerning the specific application of policies and procedures.
- Research a variety of topics (e.g. current practices, policies, and education codes) for the purpose of providing information and addressing a variety of administrative functions.
- Work with community representatives and school administrators and staff.
- Utilize current technology for research, correspondence and public relations tasks.
- Create, maintain and monitor a variety of complex records, including but not limited to lists, files, Board agenda items, and databases including confidential materials.
- Provide administrative function and support for the Board of Directors including but not limited to board meeting preparation, minutes, and follow up.
- Perform other duties as may be assigned

REQUIRED SKILLS/ABILITIES

- Excellent verbal and written communication skills.
- Excellent organizational skills and attention to detail.
- Excellent time management skills with a proven ability to meet deadlines.
- Ability to function well in a high-paced and at times stressful environment.
- Extensive knowledge of office administration, clerical procedures, and recordkeeping systems.
- Able to type/word process a minimum of 50 words per minute.
- Proficiency with computers and software including Google Suite, Word, Excel, ZOOM, and standard office equipment.

EDUCATION/EXPERIENCE

- Completion of high school or equivalent
- BA/BS preferred
- Four (4) years of complex administrative office experience to include one (1) year of experience overseeing the daily operations of an office

WORK ENVIRONMENT/PHYSICAL DEMANDS

Office Environment - Work involves sitting most of the work day greater than 50% of the time. Walking and standing are required only occasionally. Typing and applying pressure with the fingers and palm required. Substantial repetitive movements (motions) of the wrists, hands, and/or fingers. Required to have close visual acuity to perform an activity such as: preparing and analyzing data and figures; transcribing; viewing a computer terminal; extensive reading, primarily on a computer monitor. Occasional travel required for offsite meetings and events. Normally less than 10% of the time. Must be able to lift up to 15 lbs.

**Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.*

EOE STATEMENT

Sequoia Grove Charter Alliance is an equal opportunity employer that is committed to diversity and inclusion in the workplace. We prohibit discrimination and harassment of any kind based on race, color, sex, religion, sexual orientation, national origin, disability, genetic information, pregnancy, or any other protected characteristic as outlined by federal, state, or local laws. This policy applies to all employment practices within our organization, including hiring, recruiting, promotion, termination, layoff, recall, leave of absence, compensation, benefits, training, and apprenticeship. Sequoia Grove Charter Alliance makes hiring decisions based solely on qualifications, merit, and business needs at

the time.

ADDITIONAL REQUIREMENTS

DOJ fingerprint Clearance

Internal Professional Development/Training

Signature (Sequoia Grove Charter Alliance Representative)

Date

Employee

Date



Director of Community Engagement	
Job Title	Director of Community Engagement
Direct Report	CEO or Administrative Designee
FLSA Status	Exempt
Position Type	Full Time, M-F, 7:30AM to 4:00PM
Salary Schedule	Schedule B
Classification	Classified
Board Approved	
Revised	NA

**NOTE: Part-time positions are subject to an increase or decrease in hours according to school needs. Salary is prorated depending upon % of contract*

SUMMARY OF POSITION

Under the supervision of the CEO or administrative designee, the Director of Customer Engagement is responsible for providing leadership in the areas of Library Services, Ordering, Community Partners, Marketing and Media Support Services.

REPRESENTATIVE DUTIES

Employees may perform any combination of the essential functions shown below. This position description is not intended to be an exhaustive list of all duties, knowledge or abilities associated with this classification, what is intended is to accurately reflect the principal job elements.

ESSENTIAL FUNCTIONS

- Coordinate and direct communications, information, resources and personnel to meet the instructional and student support needs of the member schools
- Supervise and evaluate the performance of assigned personnel; interview and select employees and recommend transfers, reassignment, termination and disciplinary actions; coordinate subordinate work assignments and review work to assure compliance with established standards, requirements and procedures.
- Oversee the development and implementation of the Website Manager/Marketing Coordinator as it relates to programs, services, plans, strategies, processes, systems, projects, goals and objectives; services and other instructional and student support activities as directed; assure

proper and timely resolution of student, staff, faculty, administrative, department, program and related issues, complaints and conflicts.

- Provide consultation and technical expertise to administrators, faculty and others concerning assigned departments, programs, services, operations and activities; respond to inquiries, resolve issues and conflicts
- Coordinate communications, programs, services, activities and information between administrators, outside organizations, students and the public. Oversee the preparation and distribution of correspondence and marketing and informational materials as assigned.
- Assure adequate resources and personnel to meet the needs of assigned departments
- Direct and participate in the preparation and maintenance of a variety of records, reports and files related to departments, programs, services, and personnel
- Coordinate, attend and conduct various meetings, committees, conferences, seminars and special events as assigned; present materials and information concerning assigned departments, programs and functions.
- Other duties as assigned.

REQUIRED SKILLS/ABILITIES

- Ability to communicate needs of departments and technical programs effectively to senior management.
- Experience and demonstrated leadership in the following areas: strategies for promoting student learning, retention and achievement while maintaining academic standards; application of technology and alternative delivery systems to instruction; curriculum development and evaluation; and professional development of faculty and instructional staff.
- Possession of excellent interpersonal communication skills and experience in conflict mediation.
- Demonstrated knowledge of management approaches that encourage creativity and promote teaching excellence.
- Ability to work collaboratively with faculty and staff.
- Ability to develop and manage budgets.
- Experience in working with community resources to generate support for educational programs.
- Experience with applications of technology and alternative delivery systems to instruction.
- Proficiency with computers and software including Google Suite, Word, Excel, ZOOM, and standard office equipment.

EDUCATION/EXPERIENCE

- Required Bachelor's degree; preferred Master's in related field
- Minimum of two years of formal training, internship, or leadership experience reasonably related to the administrator's administrative assignment; OR
- Combination of education and other accomplishments that is equivalent to the above. (If claiming equivalency, attach a separate statement that presents the basis for this claim and submit supporting evidence, e.g., transcripts, publications, and other work products.)
- Experience in an educational setting.

WORK ENVIRONMENT/PHYSICAL DEMANDS

Office Environment - Work involves sitting most of the work day greater than 50% of the time. Walking and standing are required only occasionally. Typing and applying pressure with the fingers and palm

required. Substantial repetitive movements (motions) of the wrists, hands, and/or fingers. Required to have close visual acuity to perform an activity such as: preparing and analyzing data and figures; transcribing; viewing a computer terminal; extensive reading, primarily on a computer monitor. Occasional travel required for offsite meetings and events. Normally less than 10% of the time. Must be able to lift up to 15 lbs.

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ADDITIONAL REQUIREMENTS

DOJ fingerprint Clearance

Internal Professional Development/Training

Signature (Sequoia Grove Charter Alliance Representative)

Date

Employee

Date