

## STUDENT SUCCESS PROGRAMS

DBA – AUDEO CHARTER SCHOOL · THE CHARTER SCHOOL OF SAN DIEGO

(A California Non-Profit Public Benefit Corporation)

*Len Hering RADM, USN (ret) – Chairman,*

*Scott Barton – Member, David Crean – Member, Tim Morton – Member, Eric Schweinfurter - Member*

### BOARD OF DIRECTORS MEETING

**Wednesday, February 16, 2022, 8:00 a.m.**

**Via Video Conference and at**

*Clairemont RC 4340 Genesee Avenue, Suite 109, SD 92117, College Avenue RC 4585 College Drive, Suite C, SD, 92111, Downtown RC 1095 K Street Suite A, SD 92101, Euclid RC 220 Euclid Avenue, SD 92114, Lake Murray RC 8776 Lake Murray Blvd., SD 29119, Mira Mesa RC 8290 B, Mira Mesa Blvd., SD 92126, North Park RC 2940 North Park Way, SD 92104, Northgate RC 4125 Alpha Street, Suite C, SD 92113, Old Town, 2245 San Diego Avenue, Suite 115, SD 92110, Petco RC 1091 K Street, Suite A101, SD 92101, Point Loma RC 3145 Rosecrans Street, Suite D, SD 92110, Scripps Ranch RC 9910 Mira Mesa Blvd, Suite A2, SD 92131, Sorrento Mesa Office 10170 Huennekens Street, SD, 92121, Tierrasanta RC 10425 Tierrasanta Blvd, Suite 101, SD 92124, Woodman RC 2939 Alta View Drive, Suite B/CSD 92139, and Kearny Mesa RC 7520 Mesa College Drive, SD 92111, K5 Home School Resource Center 10725 Tierrasanta Boulevard, CA 92124, La Jolla RC 7458 Girard Avenue, SD 92037, Pacific Beach RC 959 Hornblend Street, SD 92109, Mission Valley East RC 3230 Camino Del Rio North, SD 92108*

Access to the live video conference will be accessible prior to the start of the meeting at

CSSD: <https://charterschool-sandiego.net/board-governance/>  
Audeo: <https://www.audeocharterschool.net/board-of-directors/>

This agenda contains a brief, general description of each item to be considered.

Except as otherwise provided by law, no action shall be taken on any item not appearing in the following agenda.

#### 1.0 OPEN SESSION

- 1.1 Call to Order
- 1.2 Roll Call
- 1.3 Consideration and Approval of Adoption of the Board Findings Pursuant to Government Code Section 54953(e)(1)
 

*The Charter School Board of Directors determines, in accordance with Government Code Section 54953(e)(1)(B), that meeting in person would present imminent risks to the health or safety of attendees. Pursuant to Government Code Section 54953(e)(3), the Board has also reconsidered the circumstances of the State of Emergency declared by the Governor on March 4, 2020, and finds the State of Emergency continues to directly impact the ability of the Directors to meet safely in person and/or that State or local officials continue to impose or recommend measures to promote social distancing.*
- 1.4 Establishment of Quorum
- 1.5 Pledge of Allegiance
- 1.6 Approval of Agenda *P.1-4*

#### 2.0 PUBLIC COMMENT

If you would like to participate in public comment, please complete a speaker card and submit it to Staff. Public comment for items of interest to the public and within the scope of Student Success Programs Board (non-agenda) shall be no longer than two (2) minutes. Public comment for agenda items shall be no longer than three (3) minutes. Speakers may not yield their time. In accordance with the Brown Act, no discussion or action may occur at this time, but it is the Board's prerogative to respond or give direction to staff. All public comment will be heard at this point in the agenda as ordered below. Each agenda item being commented on will have a maximum of 20 minutes

allotted and each non-agenda item will have a maximum of 10 minutes allotted. If necessary, the Board Chair may equivalently decrease the time for each speaker in order to stay within the allotted maximum.

- 2.1 Non-Agenda Public Comment
- 2.2 Agenda Public Comment

### **3.0 PUBLIC HEARING – Time Certain 8:05 a.m., or soon thereafter**

*The Governing Board of Directors encourages participation by parents, teachers, and members of the community interested in the affairs of Audeo Charter School and The Charter School of San Diego.*

- 3.1 Public Hearing for the A-G Completion Improvement Grant Presented by Tim Tuter
  - 3.1.1 Audeo Charter School [P.5-10](#)
  - 3.1.2 The Charter School of San Diego [P.11-16](#)

### **4.0 CLOSED SESSION**

- 4.1 Board Chairman Announcement Regarding Closed Session Items
- 4.2 Public Comment on Closed Session Items

#### **MOVE TO CLOSED SESSION**

- 4.2.1 Conference with Legal Counsel--Anticipated Litigation Significant Exposure to Litigation Pursuant to Paragraph (2) Or (3) Of Subdivision (d) Of Section 54956.9: (one case)

#### **RETURN TO OPEN SESSION**

- 4.3 Report out of action taken in closed session, if any.

### **5.0 ADMINISTRATIVE ITEMS**

- 5.1 Consider Approval of Revised 2021-2022 Meeting Calendar to include additional Regular Meeting on Wednesday, March 16, 2022, 8:00 am
- 5.2 California Fair Political Practices Commission Statements of Economic Interests – Form 700 Annual Filing [P.17-39](#)
- 5.3 Governance Parental Representatives Postings 2022 – 2023 on Respective School Webpages and RC's on January 14, 2022. Deadline to Submit Application: April 14, 2022
  - 5.3.1 Audeo Charter School [P.40](#)
  - 5.3.2 The Charter School of San Diego [P.41](#)
- 5.4 Consider Acceptance of the Audit Report Financial Statements and Supplemental Information for Year Ended June 30, 2021 [P.42-94](#)
- 5.5 Consider Approval of Terms of Lease Renewal for APN # 427-480-12-00
- 5.6 Consider Approval of Terms of Lease Renewal for APN # 350-612-16-00
- 5.7 Consider Approval of Terms of Lease Renewal for APN # 535-362-20-04
- 5.8 Consider Approval of Terms of Lease Renewal for APN # 453-122-13-00
- 5.9 Consider Approval of Terms of Lease Renewal for APN # 450-420-04-00
- 5.10 Consider Approval of Terms of Lease Renewal for APN # 422-021-04-00

**5.11** Consider Approval of Terms of Lease Renewal for APN # 582-270-13-00

**5.12** Consider Approval of Terms of Lease Renewal for APN # 582-270-13-00

**5.13** President's Report

**5.13.1** Midyear Retreat Update

**5.13.2** New Assignments

**5.13.3** Partners and Collaborators

**5.14** Strategic Plan Update

**5.14.1** Audeo Charter School [P.95-102](#)

**5.14.1.1** School Participation Report for the Period of 2020- 2021  
Months 12-13: 05/3/2021 – 06/25/2021

**5.14.1.2** School Participation Report for the Period of 2021- 2022  
Months 1-6: 07/1/2021 – 12/10/2021

**5.14.2** The Charter School of San Diego [P.103-127](#)

**5.14.2.1** School Participation Report for the Period of 2020- 2021  
Months 12-13: 05/3/2021 – 06/25/2021

**5.14.2.2** School Participation Report for the Period of 2021- 2022  
Months 1-6: 07/1/2021 – 12/10/2021

## **6.0 CONSENT AGENDA**

All matters listed under the consent agenda are considered by the Board to be routine and will be approved/enacted by the Board in one motion in the form listed below. Unless specifically requested by a Board member for further discussion or removed from the agenda, there will be no discussion of these items prior to the Board votes on them. The President recommends approval of all consent agenda items.

### **6.1 Consent Action Items for the Audeo Charter School and The Charter School of San Diego for Each School**

**6.1.1** Consider Approval of Meeting Minutes for December 9,2021 [P.128-129](#)

**6.1.2** Consider Approval of 2020-2021 School Accountability Report Card

**6.1.2.1** Audeo Charter School [P.130 - 157](#)

**6.1.2.2** The Charter School of San Diego [P.158-185](#)

**6.1.3** Consider Approval of the Comprehensive School Safety Plan 2021-2022 [P.186-439](#)

**6.1.4** Consider Approval of Independent Study Policy 3200 AB167 Compliant Amendment [P.440-446](#)

**6.1.5** Consider Approval of Internal Fiscal Internal Control Policy 4600 Amendment [P.447-479](#)

## **7.0 ACTION ITEMS**

### **7.1 Action Items for Audeo Charter School and The Charter School of San Diego for Each School**

**7.1.1** Local Control and Accountability Plan (LCAP) Update Presentation by Tim Tuter

**7.1.1.1** 2021-2022 LCAP Supplement to the Annual Update

**7.1.1.1.1** Audeo Charter School [P.480-488](#)

**7.1.1.1.2** The Charter School of San Diego [P.489-497](#)

**7.1.1.2** 2021–2022 LCAP Outcome Data

**7.1.1.3** 2021-2022 Mid-Year Expenditure and Implementation Data

### **7.2 Action Items for Audeo Charter School**

**7.2.1** Consider Approval of Unaudited Actuals FY July 1, 2020 – June 20, 2021 [P.498-503](#)

- 7.2.2 Consider Approval of the First Interim Report 2021-2022 [P.504-507](#)
- 7.2.3 Review the February Revised Operational Budget Assumptions FY 2021-2022 and Consider Approval of February Revised Operational Budget FY 2021-2022 [P.508-517](#)

**7.3 Actions Items for The Charter School of San Diego**

- 7.3.1 Consider Approval of Unaudited Actuals FY July 1, 2020 – June 20, 2021 [P.518-523](#)
- 7.3.2 Consider Approval of the First Interim Report 2021-2022 [P.524-527](#)
- 7.3.3 Review the February Revised Operational Budget Assumptions FY 2021-2022 and Consider Approval of February Revised Operational Budget FY 2021-2022 [P.528-538](#)

**8.0 BOARD ANNOUNCEMENTS AND COMMENTS**

From time to time, the Board has topics of interest that they would like to share with the community. These are informational in nature and do not require action.

**9.0 ADJOURNMENT**

**Next Regular Board Meeting: TBA**

Meeting Agenda available at:

[www.charterschool-sandiego.net](http://www.charterschool-sandiego.net), [www.audeocharterschool.net](http://www.audeocharterschool.net)

**Accommodation** -- Student Success Programs, Inc. (School's), does not discriminate on the basis of disability in the admission or access to, or treatment or employment in, its programs or activities. Angela Neri, has been designated to receive requests for disability-related modifications or accommodations in order to enable individuals with disabilities to participate in School's open and public meetings. Please notify Angela Neri at (858) 678-2020 twenty-four (24) hours or more prior to disability accommodations being needed in order to participate in the meeting. Translation services are available by notifying Angela Neri at (858) 678-2045 twenty-four (24) hours or more prior to the board meeting. In compliance with Government Code Section 54957.5, non-exempt writings that are distributed to a majority or all of the board in advance of a meeting may be viewed at 10170 Huennekens Street, San Diego, CA 92121; or at the scheduled meeting. In addition, if you would like a copy of any record related to an item on the agenda, please contact Angela Neri (858) 678 -2020.

*Certification of Posting*

*I, Angela Neri, hereby certify that I posted this agenda on the Audeo Charter School and The Charter School of San Diego webpage on February 12, 2022.*



February 9, 2022

**NOTICE OF PUBLIC HEARING FOR**  
**AUDEO CHARTER SCHOOL**

The Student Success Programs Board of Directors Hereby Gives Notice that a Public Hearing will be held as follows:

**TOPICS OF HEARING**

A-G Completion Improvement Grant Plan

Copies may be inspected at the meeting or:  
10170 Huennekens Street, San Diego, CA 92121

HEARING DATE: Wednesday, February 16, 2022

TIME: \*8:05 a.m., or soon thereafter as such item may be heard

LOCATION: 10170 Huennekens Street  
San Diego, CA 92121 and/or  
Via clicking on the following link:  
<https://www.audeocharterschool.net/board-of-directors/>

\* The public, open session of the Student Success Programs Board Meeting will begin at 8:00 a.m.

*Certification of Posting*

*I, Angela Neri, certify that I posted this public notice on the Audeo Charter School and The Charter School of San Diego webpage on February 9, 2022.*

## A-G Completion Improvement Grant Plan

Local Educational Agency (LEA) Name	Total Grant Allocation
Audeo Charter School	Unavailable, expected by March 2022

### Plan Descriptions

#### A description of how the funds will be used to increase or improve services for foster youth, low-income students, and English learners to improve A-G eligibility

Audeo Charter School (Audeo) is an educational option that serves students in grades k-12. Audeo provides an innovative educational experience focused on supporting the needs of students whose futures are at risk because traditional methods have failed them. It is important to note that Audeo is identified by the California Department of Education (CDE) as **Dashboard Alternative School Status (DASS)**. To be eligible for DASS, schools must have an unduplicated count of at least 70 percent of the school's total enrollment (upon first entry to the school) comprised of high-risk student groups. Therefore, most students in grades 9-12 who enroll at Audeo are credit deficient and are at risk of not graduating high school on time.

As students and families enroll at Audeo, they inform teachers, counselors and administrators via surveys and conferences that their primary goal is to finish high school and start their post-secondary pathway at a local community college. While Audeo is equipped to educate and prepare students for multiple college and career pathways, including eligibility to enter four-year universities, most students and families are interested in local community colleges.

Audeo is committed to helping each student meet their academic goals. This includes enhanced educational services and programs focused on improving the number of students who satisfy A-G requirements, with an emphasis on foster youth, low-income students, and English learners. Audeo has engaged educational partners, including teachers, staff, students, parents, and family members to develop an A-G Completion Improvement Plan. Meaningful feedback was collected through multiple collaborative settings including surveys, conversations, school events, meetings, and training. Some of the most meaningful feedback was collected during School Site Council Meetings. At this collaborative venue, teachers, staff, students, and parents participated in a Needs Assessment: analyzed school A-G completion data, discussed achievement gaps, focused on current rates of achievement and the ideal rates of growth. Furthermore, educational partners discussed current programs and services designed to help students meet A-G requirements and how the School can enhance these approaches.

Based upon feedback collected from educational partners and a Needs Assessment, the School engaged in an in-depth selection process to

identify allowable activities that build capacity, are evidence based, and address the School's need to increase A-G eligibility. Audeo plans to implement the following educational actions and services with A-G Completion Improvement Grant funds:

- Low-ratio, high frequency tutoring for students focused on increasing credit completion in A-G coursework
- Additional paraprofessionals to aid in supplemental tutoring sessions designed for students repeating coursework which they earned less than a 'C' average at their prior school
- Expansion of AVID program, including additional tutors to maintain small group instruction and increased student participation
- Creation of new engaging and supportive A-G approved courses
- Specialized professional development provided to academic counselors, and Equity and Inclusion Department to acquire evidence-based strategies that promotes a 'college going mindset' for the school community
- Professional development for teachers and department chairs to design and implement UC A-G courses
- Improved A-G coursework monitoring system and tools for credentialed staff
- Mental health and social-emotional learning programs and services that promote life skills, wellness, positive behaviors and resiliency in achieving personal goals
- Partner with local universities, colleges, and non-profit organizations to provide informational and planning workshops related to A-G requirements and benefits available to the school community
- Design and disseminate marketing materials to the school community, including flyers, newsletters and social media content that encourages student participation in A-G programs
- Additional family engagement opportunities through Open House Events, Senior Night Events, ELAC, SSC, and Family Learning Series events to explain and promote A-G completion
- Financial assistance for underserved student groups to encourage registration in alternate A-G completion, including dual enrollment, articulation, and AP Exams

**A description of the extent to which all students, including foster youth, low-income students, and English learners, will have access to A-G courses approved by the University of California.**

All students, including foster youth, low-income, and English Learners have access to A-G courses through the A-G transcript audits and the yearly meetings that the counselor has with teachers reviewing their A-G course plans for each student. Three times a year, the counselor, instructional lead, and teacher review each student's transcript that has been translated on a credit audit. This ensures that correct and intentional course planning is occurring throughout the school year. Additionally, all core courses are on the UC A-G list along with the majority of Career Technical Education (CTE) courses (all CTE Pathways courses), all Visual and Performing Arts (VAPA) and Languages Other Than English (LOTE) courses, and many other general electives. These processes, along with the plethora of A-G approved course options, allows all students, including foster youth, low-income, and English Learners to have access to A-G courses.

**The number of students who were identified for opportunities to retake A-G approved courses in which they received a “D”, “F”, or “Fail” grade in the 2020 spring semester or the 2020-21 school year and a description of the method used to offer the opportunity retake courses.**

Upon student enrollment, our academic counselors review all transcripts and create a personalized pathways education plan. This customized course plan considers any D's or F's the student received and the graduation plan the student is pursuing. Due to the individualized and personalized nature of our program, students often come to us needing to remediate previously failed coursework and catch up to their grade level peers. Currently, 58% of Audeo are credit deficient when enrolling. This percentage reflects the students who enroll at Audeo with D's or F's on their high school transcript. All students can work towards an A-G diploma and retake A-G approved courses in which they received a “D”, “F” or “Fail” grade. Students retaking A-G approved courses in which they received a “D”, “F”, or “Fail” grade in the past will receive additional support in the course/s they are retaking through individualized tutoring. These students will also receive course planning guidance through Counseling Services. They will have the opportunity to take the course in a pre-test format to demonstrate prior knowledge and only focus on remediating the content they do not show proficiency in.

**A description of how the plan and described services, and associated expenditures, if applicable, supplement services in the Local Control and Accountability Plan and Learning Recovery Plan.**

Audeo's 2021-22 board approved LCAP contains five well-developed goals that are specific, measurable and time bound. Each goal is specific to a certain element of the educational program, including instruction, curriculum, professional development, school climate and engagement opportunities of educational partners. The narrative below will explain how the school plans to use A-G Completion Improvement Grant funds to supplement specific LCAP Goals and services.

LCAP Goal 1 is focused on providing personalized instruction to students that will improve student outcomes related to academic engagement and performance. This personalized instructional approach includes one-on-one and small group tutoring, provided virtually or in-person by teachers, depending on the preference of students and families. In addition, Audeo provides additional tutoring opportunities for underserved student groups and/or students at-risk of failing. Audeo plans to use A-G Completion Improvement Grant funds to further expand these tutoring opportunities, with a focus on providing the same tutors to students throughout the year. In addition, this expanded tutoring approach will support low-ratio, high-frequency meetings. The central goal of this expanded tutoring approach is to support high school students with the successful and timely completion of A-G coursework and/or added support to students earning a “D” or “F” in a prior school.

LCAP Goal 2 is focused on providing a rigorous course of study, aligned to California content standards and accessible to all students. The School provides all students with access to core courses that are A-G approved and advanced coursework, including honors and Advanced Placement (AP). In addition, each student has an academic counselor who supports the development of a personalized course plan and provides frequent opportunities to meet throughout the school year to discuss progress towards meeting college/career pathways. The school plans to use A-G

Completion Improvement Grant funds to design and develop new A-G courses that are both rigorous, engaging, and supportive. A-G Completion Improvement Grant funds can also supplement the payment of fees for students interested in taking AP exams and dual enrollment opportunities at community colleges.

LCAP Goal 3 aims to provide a data informed professional learning system to increase effectiveness of school staff meeting the unique educational needs of each student. Trainings include, knowledge of content standards, implementation of the English Learner Plan, effective use of technology, trauma informed practices for schools, Career Technical Education and more. The School will utilize A-G Completion Improvement Grant funds to expand training offerings to counselors and Equity and Inclusion staff, with an emphasis on evidence-based strategies that promote a 'university going mindset' for students and families. With this expanded training, counselors and staff will be equipped to implement these strategies and monitoring tools/methods in one-on-one counseling sessions with students and families and in information workshops delivered through the School's Family Learning Series. Counselors can also share strategies with teachers that will influence and impact the way they provide instruction and converse with students and families related to post-secondary plans.

LCAP Goal 4 is centered on providing a safe environment and supportive school culture for all educational partners. Some of the key services related to this goal include nursing services for physical health needs and licensed mental health therapists to provide counseling services to students. The School plans to use A-G Completion Improvement Grant funds to expand opportunities for students to participate in counseling and informational sessions related to mental and physical health. This expanded wellness program will be a multi-faceted approach that is proactive in maintaining wellness, but also responding to the unique needs of the students as they are identified. These added counseling services and informational sessions will support consistent student attendance, positive behaviors and increased achievement in school which will lead to improved completion of A-G requirements.

LCAP Goal 5 is focused on providing innovative, engaging and community-based resource centers that support the needs of students and families. Some of the key services embedded within Goal 5 include formal engagement opportunities, Family Learning Series, Bus Pass Program, and materials/resources that are accessible to non-English speaking families. The school plans to use A-G Completion Improvement Grant funds to partner with local colleges, universities, and non-profits with expertise in providing ongoing informational workshops focused on college preparation and access. Topics will include, but are not limited to, financial aid assistance, scholarships, benefits and what to expect. The school will also utilize A-G Completion Improvement Grant funds to create engaging flyers, handouts, and newsletters, in multiple languages and formats, focused on creating a college going mindset and recruitment of students and parents to attend workshops related to college preparation and planning.

## **Plan Expenditures**

Programs and services to increase or improve A-G completion	Planned Expenditures
<b>Instruction:</b> Low-ratio, high frequency academic tutoring opportunities for students focused on supporting student achievement in A-G coursework; expansion of AVID programs that promote college planning and readiness	Unavailable, expected Mar-22
<b>Curriculum:</b> Design new and engaging curriculum that is aligned to California content standards and receive A-G approval	Unavailable, expected Mar-22
<b>Professional Learning:</b> Professional development for teachers, counselors and staff related to building capacity to implement strategies and monitoring tools that will promote a 'college going mindset'	Unavailable, expected Mar-22
<b>Mental Health and Social Emotional Learning:</b> Counseling services and wellness programs that promote positive student behaviors, interactions, relationships and resiliency	Unavailable, expected Mar-22
<b>Community Partnerships:</b> Partner with colleges, universities, non-profits, and local organizations that can provide informational and counseling sessions related to college preparation and meeting A-G requirements	Unavailable, expected Mar-22
<b>Marketing and Recruitment:</b> Marketing materials and expenses related to the creation of flyers, newsletters and social media content that promote A-G completion	Unavailable, expected Mar-22
<b>Other:</b> Financial assistance for underserved student groups that promote successful completion of A-G requirements	Unavailable, expected Mar-22



February 9, 2022

**NOTICE OF PUBLIC HEARING FOR  
THE CHARTER SCHOOL OF SAN DIEGO**

The Student Success Programs Board of Directors Hereby Gives Notice that a Public Hearing will be held as follows:

**TOPICS OF HEARING:**

A-G Completion Improvement Grant Plan

Copies may be inspected at the meeting or:  
10170 Huennekens Street, San Diego, CA 92121

HEARING DATE: Wednesday, February 16, 2022

TIME: \*8:05 a.m., or soon thereafter as such item may be heard

LOCATION: 10170 Huennekens Street  
San Diego, CA 92121 and/or  
Via clicking on the following link:  
<https://charterschool-sandiego.nert/board-governance/>

\* The public, open session of the Student Success Programs Board Meeting will begin at 8:00 a.m.

### A-G Completion Improvement Grant Plan

Local Educational Agency (LEA) Name	Total Grant Allocation
The Charter School of San Diego	Unavailable, expected by March 2022

### Plan Descriptions

**A description of how the funds will be used to increase or improve services for foster youth, low-income students, and English learners to improve A-G eligibility**

The Charter School of San Diego (CSSD) is an educational option that serves students in grades 6-12. CSSD provides an innovative educational experience focused on supporting the needs of students whose futures are at risk because traditional methods have failed them. It is important to note that CSSD is identified by the California Department of Education (CDE) as **Dashboard Alternative School Status (DASS)**. To be eligible for DASS, schools must have an unduplicated count of at least 70 percent of the school’s total enrollment (upon first entry to the school) comprised of high-risk student groups. Therefore, most students who enroll at CSSD are credit deficient and are at risk of not graduating high school on time.

As students and families enroll at CSSD, they inform teachers, counselors and administrators via surveys and conferences that their primary goal is to finish high school and start their post-secondary pathway at a local community college. While CSSD is equipped to educate and prepare students for multiple college and career pathways, including eligibility to enter four-year universities, most students and families are interested in local community colleges.

CSSD is committed to helping each student meet their academic goals. This includes enhanced educational services and programs focused on improving the number of students who satisfy A-G requirements, with an emphasis on foster youth, low-income students, and English learners. CSSD has engaged educational partners, including teachers, staff, students, parents, and family members to develop an A-G Completion Improvement Plan. Meaningful feedback was collected through multiple collaborative settings including surveys, conversations, school events, meetings, and training. Some of the most meaningful feedback was collected during School Site Council Meetings. At this collaborative venue, teachers, staff, students, and parents participated in a Needs Assessment: analyzed school A-G completion data, discussed achievement gaps, focused on current rates of achievement and the ideal rates of growth. Furthermore, educational partners discussed current programs and services designed to help students meet A-G requirements and how the School can enhance these approaches.

Based upon feedback collected from educational partners and a Needs Assessment, the School engaged in an in-depth selection process to

identify allowable activities that build capacity, are evidence based, and address the School's need to increase A-G eligibility. CSSD plans to implement the following educational actions and services with A-G Completion Improvement Grant funds:

- Low-ratio, high frequency tutoring for students focused on increasing credit completion in A-G coursework
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**The number of students who were identified for opportunities to retake A-G approved courses in which they received a “D”, “F”, or “Fail” grade in the 2020 spring semester or the 2020-21 school year and a description of the method used to offer the opportunity retake courses.**

Upon student enrollment, our academic counselors review all transcripts and create a personalized pathways education plan. This customized course plan considers any D's or F's the student received and the graduation plan the student is pursuing. Due to the individualized and personalized nature of our program, students often come to us needing to remediate previously failed coursework and catch up to their grade level peers. Currently, 60% of CSSD are credit deficient when enrolling. This percentage reflects the students who enroll at CSSD with D's or F's on their high school transcript. All students can work towards an A-G diploma and retake A-G approved courses in which they received a “D”, “F” or “Fail” grade. Students retaking A-G approved courses in which they received a “D”, “F”, or “Fail” grade in the past will receive additional support in the course/s they are retaking through individualized tutoring. These students will also receive course planning guidance through Counseling Services. They will have the opportunity to take the course in a pre-test format to demonstrate prior knowledge and only focus on remediating the content they do not show proficiency in.

**A description of how the plan and described services, and associated expenditures, if applicable, supplement services in the Local Control and Accountability Plan and Learning Recovery Plan.**

CSSD's 2021-22 board approved LCAP contains five well-developed goals that are specific, measurable and time bound. Each goal is specific to a certain element of the educational program, including instruction, curriculum, professional development, school climate and engagement opportunities of educational partners. The narrative below will explain how the school plans to use A-G Completion Improvement Grant funds to supplement specific LCAP Goals and services.

LCAP Goal 1 is focused on providing personalized instruction to students that will improve student outcomes related to academic engagement and performance. This personalized instructional approach includes one-on-one and small group tutoring, provided virtually or in-person by teachers, depending on the preference of students and families. In addition, CSSD provides additional tutoring opportunities for underserved student groups and/or students at-risk of failing. CSSD plans to use A-G Completion Improvement Grant funds to further expand these tutoring opportunities, with a focus on providing the same tutors to students throughout the year. In addition, this expanded tutoring approach will support low-ratio, high-frequency meetings. The central goal of this expanded tutoring approach is to support high school students with the successful and timely completion of A-G coursework and/or added support to students earning a “D” or “F” in a prior school.

LCAP Goal 2 is focused on providing a rigorous course of study, aligned to California content standards and accessible to all students. The School provides all students with access to core courses that are A-G approved and advanced coursework, including honors and Advanced Placement (AP). In addition, each student has an academic counselor who supports the development of a personalized course plan and provides frequent opportunities to meet throughout the school year to discuss progress towards meeting college/career pathways. The school plans to use A-G

Completion Improvement Grant funds to design and develop new A-G courses that are both rigorous, engaging, and supportive. A-G Completion Improvement Grant funds can also supplement the payment of fees for students interested in taking AP exams and dual enrollment opportunities at community colleges.

LCAP Goal 3 aims to provide a data informed professional learning system to increase effectiveness of school staff meeting the unique educational needs of each student. Trainings include, knowledge of content standards, implementation of the English Learner Plan, effective use of technology, trauma informed practices for schools, Career Technical Education and more. The School will utilize A-G Completion Improvement Grant funds to expand training offerings to counselors and Equity and Inclusion staff, with an emphasis on evidence-based strategies that promote a 'university going mindset' for students and families. With this expanded training, counselors and staff will be equipped to implement these strategies and monitoring tools/methods in one-on-one counseling sessions with students and families and in information workshops delivered through the School's Family Learning Series. Counselors can also share strategies with teachers that will influence and impact the way they provide instruction and converse with students and families related to post-secondary plans.

LCAP Goal 4 is centered on providing a safe environment and supportive school culture for all educational partners. Some of the key services related to this goal include nursing services for physical health needs and licensed mental health therapists to provide counseling services to students. The School plans to use A-G Completion Improvement Grant funds to expand opportunities for students to participate in counseling and informational sessions related to mental and physical health. This expanded wellness program will be a multi-faceted approach that is proactive in maintaining wellness, but also responding to the unique needs of the students as they are identified. These added counseling services and informational sessions will support consistent student attendance, positive behaviors and increased achievement in school which will lead to improved completion of A-G requirements.

LCAP Goal 5 is focused on providing innovative, engaging and community-based resource centers that support the needs of students and families. Some of the key services embedded within Goal 5 include formal engagement opportunities, Family Learning Series, Bus Pass Program, and materials/resources that are accessible to non-English speaking families. The school plans to use A-G Completion Improvement Grant funds to partner with local colleges, universities, and non-profits with expertise in providing ongoing informational workshops focused on college preparation and access. Topics will include, but are not limited to, financial aid assistance, scholarships, benefits and what to expect. The school will also utilize A-G Completion Improvement Grant funds to create engaging flyers, handouts, and newsletters, in multiple languages and formats, focused on creating a college going mindset and recruitment of students and parents to attend workshops related to college preparation and planning.

## **Plan Expenditures**

Programs and services to increase or improve A-G completion	Planned Expenditures
<b>Instruction:</b> Low-ratio, high frequency academic tutoring opportunities for students focused on supporting student achievement in A-G coursework; expansion of AVID programs that promote college planning and readiness	Unavailable, expected Mar-22
<b>Curriculum:</b> Design new and engaging curriculum that is aligned to California content standards and receive A-G approval	Unavailable, expected Mar-22
<b>Professional Learning:</b> Professional development for teachers, counselors and staff related to building capacity to implement strategies and monitoring tools that will promote a 'college going mindset'	Unavailable, expected Mar-22
<b>Mental Health and Social Emotional Learning:</b> Counseling services and wellness programs that promote positive student behaviors, interactions, relationships and resiliency	Unavailable, expected Mar-22
<b>Community Partnerships:</b> Partner with colleges, universities, non-profits, and local organizations that can provide informational and counseling sessions related to college preparation and meeting A-G requirements	Unavailable, expected Mar-22
<b>Marketing and Recruitment:</b> Marketing materials and expenses related to the creation of flyers, newsletters and social media content that promote A-G completion	Unavailable, expected Mar-22
<b>Other:</b> Financial assistance for underserved student groups that promote successful completion of A-G requirements	Unavailable, expected Mar-22

# 2021-2022 Statement of Economic Interests



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## Form 700

A Public Document

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- Helpful Resources**
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  - Excel Version
  - FAQs
  - Gift and Travel Fact Sheet for State and Local Officials

## California Fair Political Practices Commission

1102 Q Street, Suite 3000 • Sacramento, CA 95811

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

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

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

## Quick Start Guide

Detailed instructions begin on page 3.

### WHEN IS THE ANNUAL STATEMENT DUE?

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

### WHERE DO I FILE?

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

### ITEMS TO NOTE!

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

### NOTHING TO REPORT?

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

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

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

### QUESTIONS?

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

### E-FILING ISSUES?

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

## What's New

### Gift Limit Increase

The gift limit increased to **\$520** for calendar years **2021** and **2022**. The gift limit in 2020 was **\$500**.

### Who must file:

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

#### Exception:

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

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

### Where to file:

#### 87200 Filers

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

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

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

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

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

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

Candidates file as follow:

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

### How to file:

The Form 700 is available at [www.fppc.ca.gov](http://www.fppc.ca.gov). Form 700 schedules are also available in Excel format. Each Statement must have a handwritten "wet" signature or "secure electronic signature," meaning either (1) a signature submitted using an approved electronic filing system or (2) if permitted by the filing officer, a digital signature submitted via the filer's agency email address. (See Regulations 18104 and 18757.) Companies such as Adobe and DocuSign offer digital signature services. All statements are signed under the penalty of perjury and must be verified by the filer. See Regulation 18723.1(c) for filing instructions for copies of expanded statements.

### When to file:

#### Annual Statements

##### ⇒ March 1, 2022

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

##### ⇒ April 1, 2022

- Most other filers

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

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

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

#### Assuming Office and Leaving Office Statements

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

#### Exception:

If you assumed office between October 1, 2021, and December 31, 2021, and filed an assuming office statement, you are not required to file an annual statement until March 1, 2023, or April 1, 2023, whichever is applicable. The annual statement will cover the day after you assumed office through December 31, 2022. (See Reference Pamphlet, page 6, for additional exceptions.)

#### Candidate Statements

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

#### Late Statements

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

#### Amendments

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

## Types of Statements

### Assuming Office Statement:

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

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

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

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

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

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

### Annual Statement:

Generally, the period covered is January 1, 2021, through December 31, 2021. If the period covered by the statement is different than January 1, 2021, through December 31, 2021, (for example, you assumed office between October 1, 2020, and December 31, 2020 or you are combining statements), you must specify the period covered.

- Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement must be reported. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2021.

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

### Leaving Office Statement:

Generally, the period covered is January 1, 2021, through the date you stopped performing the duties of your position. If the period covered differs from January 1, 2021, through the date you stopped performing the duties of your position (for example, you assumed office between October 1, 2020, and December 31, 2020, or you are combining statements), the period covered must be specified. The reporting period can cover parts of two calendar years.

- Report: Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2021.

### Candidate Statement:

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

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

### Amendments:

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

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

### Expanded Statement:

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

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

Please type or print in ink.

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

**1. Office, Agency, or Court**

Agency Name (Do not use acronyms)

Division, Board, Department, District, if applicable Your Position

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

Agency: Position:

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

- State  Judge, Retired Judge, Pro Tem Judge, or Court Commissioner (Statewide Jurisdiction)
- Multi-County  County of
- City of  Other

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

- Annual: The period covered is January 1, 2021, through December 31, 2021.  Leaving Office: Date Left / / (Check one circle.)
- or- The period covered is / /, through  The period covered is January 1, 2021, through the date of leaving office.
- Assuming Office: Date assumed / / -or-  The period covered is / /, through the date of leaving office.
- Candidate: Date of Election and office sought, if different than Part 1:

**4. Schedule Summary (must complete) ► Total number of pages including this cover page:**

**Schedules attached**

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

-or-  None - No reportable interests on any schedule

**5. Verification**

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

DAYTIME TELEPHONE NUMBER EMAIL ADDRESS  
( )

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

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

Date Signed (month, day, year)

Signature (File the originally signed paper statement with your filing official.)

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

**Part 1. Office, Agency, or Court**

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

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

**Example:**

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

**Part 2. Jurisdiction of Office**

- Check the box indicating the jurisdiction of your agency and, if applicable, identify the jurisdiction. Judges, judicial candidates, and court commissioners have statewide jurisdiction. All other filers should review the Reference Pamphlet, page 13, to determine their jurisdiction.
- If your agency is a multi-county office, list each county in which your agency has jurisdiction.

- If your agency is not a state office, court, county office, city office, or multi-county office (e.g., school districts, special districts and JPAs), check the “other” box and enter the county or city in which the agency has jurisdiction.

**Example:**

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

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

**Part 3. Type of Statement**

Check at least one box. The period covered by a statement is determined by the type of statement you are filing. If you are completing a 2021 annual statement, **do not** change the pre-printed dates to reflect 2022. Your annual statement is used for reporting the **previous year’s** economic interests. Economic interests for your annual filing covering January 1, 2022, through December 31, 2022, will be disclosed on your statement filed in 2023. See Reference Pamphlet, page 4.

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

**Part 4. Schedule Summary**

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

**Part 5. Verification**

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

**When you sign your statement, you are stating, under penalty of perjury, that it is true and correct.** Only the filer has authority to sign the statement. An unsigned statement is not considered filed and you may be subject to late filing penalties.

# SCHEDULE A-1

## Investments

### Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.

Name

▶ NAME OF BUSINESS ENTITY

---

GENERAL DESCRIPTION OF THIS BUSINESS

---

FAIR MARKET VALUE

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

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

NATURE OF INVESTMENT

Stock       Other \_\_\_\_\_ (Describe)

Partnership       Income Received of \$0 - \$499

Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_/\_\_\_\_/21      \_\_\_\_/\_\_\_\_/21

ACQUIRED      DISPOSED

▶ NAME OF BUSINESS ENTITY

---

GENERAL DESCRIPTION OF THIS BUSINESS

---

FAIR MARKET VALUE

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

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

NATURE OF INVESTMENT

Stock       Other \_\_\_\_\_ (Describe)

Partnership       Income Received of \$0 - \$499

Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_/\_\_\_\_/21      \_\_\_\_/\_\_\_\_/21

ACQUIRED      DISPOSED

▶ NAME OF BUSINESS ENTITY

---

GENERAL DESCRIPTION OF THIS BUSINESS

---

FAIR MARKET VALUE

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

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

NATURE OF INVESTMENT

Stock       Other \_\_\_\_\_ (Describe)

Partnership       Income Received of \$0 - \$499

Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_/\_\_\_\_/21      \_\_\_\_/\_\_\_\_/21

ACQUIRED      DISPOSED

▶ NAME OF BUSINESS ENTITY

---

GENERAL DESCRIPTION OF THIS BUSINESS

---

FAIR MARKET VALUE

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

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

NATURE OF INVESTMENT

Stock       Other \_\_\_\_\_ (Describe)

Partnership       Income Received of \$0 - \$499

Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_/\_\_\_\_/21      \_\_\_\_/\_\_\_\_/21

ACQUIRED      DISPOSED

▶ NAME OF BUSINESS ENTITY

---

GENERAL DESCRIPTION OF THIS BUSINESS

---

FAIR MARKET VALUE

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

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

NATURE OF INVESTMENT

Stock       Other \_\_\_\_\_ (Describe)

Partnership       Income Received of \$0 - \$499

Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_/\_\_\_\_/21      \_\_\_\_/\_\_\_\_/21

ACQUIRED      DISPOSED

▶ NAME OF BUSINESS ENTITY

---

GENERAL DESCRIPTION OF THIS BUSINESS

---

FAIR MARKET VALUE

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

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

NATURE OF INVESTMENT

Stock       Other \_\_\_\_\_ (Describe)

Partnership       Income Received of \$0 - \$499

Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_/\_\_\_\_/21      \_\_\_\_/\_\_\_\_/21

ACQUIRED      DISPOSED

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

Print

Clear

## Instructions – Schedules A-1 and A-2 Investments

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

### Reportable investments include:

- Stocks, bonds, warrants, and options, including those held in margin or brokerage accounts and managed investment funds (See Reference Pamphlet, page 13.)
- Sole proprietorships
- Your own business or your spouse’s or registered domestic partner’s business (See Reference Pamphlet, page 8, for the definition of “business entity.”)
- Your spouse’s or registered domestic partner’s investments even if they are legally separate property
- Partnerships (e.g., a law firm or family farm)
- Investments in reportable business entities held in a retirement account (See Reference Pamphlet, page 15.)
- If you, your spouse or registered domestic partner, and dependent children together had a 10% or greater ownership interest in a business entity or trust (including a living trust), you must disclose investments held by the business entity or trust. (See Reference Pamphlet, page 16, for more information on disclosing trusts.)
- Business trusts

### You are not required to disclose:

- Government bonds, diversified mutual funds, certain funds similar to diversified mutual funds (such as exchange traded funds) and investments held in certain retirement accounts. (See Reference Pamphlet, page 13.) (Regulation 18237)
- Bank accounts, savings accounts, money market accounts and certificates of deposits
- Insurance policies
- Annuities
- Commodities
- Shares in a credit union
- Government bonds (including municipal bonds)

### Reminders

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

- Retirement accounts invested in non-reportable interests (e.g., insurance policies, mutual funds, or government bonds) (See Reference Pamphlet, page 15.)
- Government defined-benefit pension plans (such as CalPERS and CalSTRS plans)
- Certain interests held in a blind trust (See Reference Pamphlet, page 16.)

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

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

### To Complete Schedule A-1:

Do not attach brokerage or financial statements.

- Disclose the name of the business entity.
- Provide a general description of the business activity of the entity (e.g., pharmaceuticals, computers, automobile manufacturing, or communications).
- Check the box indicating the highest fair market value of your investment during the reporting period. If you are filing a candidate or an assuming office statement, indicate the fair market value on the filing date or the date you took office, respectively. (See page 20 for more information.)
- Identify the nature of your investment (e.g., stocks, warrants, options, or bonds).
- An acquired or disposed of date is only required if you initially acquired or entirely disposed of the investment interest during the reporting period. The date of a stock dividend reinvestment or partial disposal is not required. Generally, these dates will not apply if you are filing a candidate or an assuming office statement.

### Examples:

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

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

# SCHEDULE A-2

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

(Ownership Interest is 10% or Greater)

**▶ 1. BUSINESS ENTITY OR TRUST**

Name \_\_\_\_\_

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

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

GENERAL DESCRIPTION OF THIS BUSINESS

---

FAIR MARKET VALUE                      IF APPLICABLE, LIST DATE:

<input type="checkbox"/> \$0 - \$1,999	_____ / _____ / <b>21</b>	_____ / _____ / <b>21</b>
<input type="checkbox"/> \$2,000 - \$10,000	ACQUIRED	DISPOSED
<input type="checkbox"/> \$10,001 - \$100,000		
<input type="checkbox"/> \$100,001 - \$1,000,000		
<input type="checkbox"/> Over \$1,000,000		

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

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

**▶ 1. BUSINESS ENTITY OR TRUST**

Name \_\_\_\_\_

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

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

GENERAL DESCRIPTION OF THIS BUSINESS

---

FAIR MARKET VALUE                      IF APPLICABLE, LIST DATE:

<input type="checkbox"/> \$0 - \$1,999	_____ / _____ / <b>21</b>	_____ / _____ / <b>21</b>
<input type="checkbox"/> \$2,000 - \$10,000	ACQUIRED	DISPOSED
<input type="checkbox"/> \$10,001 - \$100,000		
<input type="checkbox"/> \$100,001 - \$1,000,000		
<input type="checkbox"/> Over \$1,000,000		

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

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

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

<input type="checkbox"/> \$0 - \$499	<input type="checkbox"/> \$10,001 - \$100,000
<input type="checkbox"/> \$500 - \$1,000	<input type="checkbox"/> OVER \$100,000
<input type="checkbox"/> \$1,001 - \$10,000	

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

<input type="checkbox"/> \$0 - \$499	<input type="checkbox"/> \$10,001 - \$100,000
<input type="checkbox"/> \$500 - \$1,000	<input type="checkbox"/> OVER \$100,000
<input type="checkbox"/> \$1,001 - \$10,000	

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

None    or     Names listed below

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

None    or     Names listed below

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

Check one box:  
 INVESTMENT     REAL PROPERTY

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

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

FAIR MARKET VALUE                      IF APPLICABLE, LIST DATE:

<input type="checkbox"/> \$2,000 - \$10,000	_____ / _____ / <b>21</b>	_____ / _____ / <b>21</b>
<input type="checkbox"/> \$10,001 - \$100,000	ACQUIRED	DISPOSED
<input type="checkbox"/> \$100,001 - \$1,000,000		
<input type="checkbox"/> Over \$1,000,000		

NATURE OF INTEREST  
 Property Ownership/Deed of Trust     Stock     Partnership

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

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

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

Check one box:  
 INVESTMENT     REAL PROPERTY

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

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

FAIR MARKET VALUE                      IF APPLICABLE, LIST DATE:

<input type="checkbox"/> \$2,000 - \$10,000	_____ / _____ / <b>21</b>	_____ / _____ / <b>21</b>
<input type="checkbox"/> \$10,001 - \$100,000	ACQUIRED	DISPOSED
<input type="checkbox"/> \$100,001 - \$1,000,000		
<input type="checkbox"/> Over \$1,000,000		

NATURE OF INTEREST  
 Property Ownership/Deed of Trust     Stock     Partnership

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

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

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

**Print**    **Clear**

## Instructions – Schedule A-2

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

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

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

#### To Complete Schedule A-2:

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

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

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

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

- Disclose each source of income and outstanding loan **to the business entity or trust** identified in Part 1 if your pro rata share of the **gross** income (including your community property interest in your spouse's or registered domestic partner's share) to the business entity or trust from that source was \$10,000 or more during the reporting period. (See Reference Pamphlet, page 11, for examples.) Income from governmental sources may be reportable if not considered salary. See Regulation 18232. Loans from commercial lending institutions made in the lender's regular course of business on terms available to members of the public without regard to your official status are not reportable.
- Disclose each individual or entity that was a source of commission income of \$10,000 or more during the reporting period through the business entity identified in Part 1. (See Reference Pamphlet, page 8.)

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

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

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

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



## Instructions – Schedule B Interests in Real Property

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

### Interests in real property include:

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

### You are **not** required to report:

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

### To Complete Schedule B:

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

#### Reminders

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

disclose the number of years remaining on the lease.

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

When reporting a loan:

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

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

### Example:

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

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

# SCHEDULE C

## Income, Loans, & Business Positions

(Other than Gifts and Travel Payments)

**CALIFORNIA FORM 700**

FAIR POLITICAL PRACTICES COMMISSION

Name \_\_\_\_\_

▶ 1. INCOME RECEIVED
▶ 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME \_\_\_\_\_

ADDRESS *(Business Address Acceptable)* \_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF SOURCE \_\_\_\_\_

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

GROSS INCOME RECEIVED     No Income - Business Position Only

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

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

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

Salary     Spouse's or registered domestic partner's income  
*(For self-employed use Schedule A-2.)*

Partnership (Less than 10% ownership. For 10% or greater use  
Schedule A-2.)

Sale of \_\_\_\_\_  
*(Real property, car, boat, etc.)*

Loan repayment

Commission or     Rental Income, list each source of \$10,000 or more

\_\_\_\_\_ *(Describe)*

Other \_\_\_\_\_  
*(Describe)*

NAME OF SOURCE OF INCOME \_\_\_\_\_

ADDRESS *(Business Address Acceptable)* \_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF SOURCE \_\_\_\_\_

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

GROSS INCOME RECEIVED     No Income - Business Position Only

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

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

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

Salary     Spouse's or registered domestic partner's income  
*(For self-employed use Schedule A-2.)*

Partnership (Less than 10% ownership. For 10% or greater use  
Schedule A-2.)

Sale of \_\_\_\_\_  
*(Real property, car, boat, etc.)*

Loan repayment

Commission or     Rental Income, list each source of \$10,000 or more

\_\_\_\_\_ *(Describe)*

Other \_\_\_\_\_  
*(Describe)*

▶ 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD

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

NAME OF LENDER\* \_\_\_\_\_

ADDRESS *(Business Address Acceptable)* \_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF LENDER \_\_\_\_\_

HIGHEST BALANCE DURING REPORTING PERIOD

\$500 - \$1,000

\$1,001 - \$10,000

\$10,001 - \$100,000

OVER \$100,000

INTEREST RATE                      TERM (Months/Years)

\_\_\_\_\_ %     None                      \_\_\_\_\_

SECURITY FOR LOAN

None                       Personal residence

Real Property \_\_\_\_\_  
*Street address*

\_\_\_\_\_ *City*

Guarantor \_\_\_\_\_

Other \_\_\_\_\_  
*(Describe)*

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

## Instructions – Schedule C

### Income, Loans, & Business Positions

#### (Income Other Than Gifts and Travel Payments)

#### Reporting Income:

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

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

#### Reporting Business Positions:

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

#### Commonly reportable income and loans include:

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

#### Reminders

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

#### You are not required to report:

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

(See Reference Pamphlet, page 12.)

#### To Complete Schedule C:

##### Part 1. Income Received/Business Position Disclosure

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

##### Part 2. Loans Received or Outstanding During the Reporting Period

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

## SCHEDULE D Income – Gifts

Name \_\_\_\_\_

▶ NAME OF SOURCE *(Not an Acronym)*

\_\_\_\_\_

ADDRESS *(Business Address Acceptable)*

\_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF SOURCE

\_\_\_\_\_

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

▶ NAME OF SOURCE *(Not an Acronym)*

\_\_\_\_\_

ADDRESS *(Business Address Acceptable)*

\_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF SOURCE

\_\_\_\_\_

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

▶ NAME OF SOURCE *(Not an Acronym)*

\_\_\_\_\_

ADDRESS *(Business Address Acceptable)*

\_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF SOURCE

\_\_\_\_\_

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

▶ NAME OF SOURCE *(Not an Acronym)*

\_\_\_\_\_

ADDRESS *(Business Address Acceptable)*

\_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF SOURCE

\_\_\_\_\_

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

▶ NAME OF SOURCE *(Not an Acronym)*

\_\_\_\_\_

ADDRESS *(Business Address Acceptable)*

\_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF SOURCE

\_\_\_\_\_

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

▶ NAME OF SOURCE *(Not an Acronym)*

\_\_\_\_\_

ADDRESS *(Business Address Acceptable)*

\_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF SOURCE

\_\_\_\_\_

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

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

**Print**      **Clear**

## Instructions – Schedule D

### Income – Gifts

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

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

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

#### Commonly reportable gifts include:

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

#### Reminders

- Gifts from a single source are subject to a \$520 limit in 2021. (See Reference Pamphlet, page 10.)
- Code filers – you only need to report gifts from reportable sources.

#### Gift Tracking Mobile Application

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

#### You are not required to disclose:

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

#### To Complete Schedule D:

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

**CALIFORNIA FORM 700**  
 FAIR POLITICAL PRACTICES COMMISSION  
 Name \_\_\_\_\_

## SCHEDULE E

### Income – Gifts

### Travel Payments, Advances, and Reimbursements

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

▶ NAME OF SOURCE *(Not an Acronym)* \_\_\_\_\_

ADDRESS *(Business Address Acceptable)* \_\_\_\_\_

CITY AND STATE \_\_\_\_\_

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

DATE(S): \_\_\_\_/\_\_\_\_/\_\_\_\_ - \_\_\_\_/\_\_\_\_/\_\_\_\_ AMT: \$ \_\_\_\_\_  
*(If gift)*

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

Made a Speech/Participated in a Panel

Other - Provide Description \_\_\_\_\_

▶ If Gift, Provide Travel Destination \_\_\_\_\_

▶ NAME OF SOURCE *(Not an Acronym)* \_\_\_\_\_

ADDRESS *(Business Address Acceptable)* \_\_\_\_\_

CITY AND STATE \_\_\_\_\_

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

DATE(S): \_\_\_\_/\_\_\_\_/\_\_\_\_ - \_\_\_\_/\_\_\_\_/\_\_\_\_ AMT: \$ \_\_\_\_\_  
*(If gift)*

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

Made a Speech/Participated in a Panel

Other - Provide Description \_\_\_\_\_

▶ If Gift, Provide Travel Destination \_\_\_\_\_

▶ NAME OF SOURCE *(Not an Acronym)* \_\_\_\_\_

ADDRESS *(Business Address Acceptable)* \_\_\_\_\_

CITY AND STATE \_\_\_\_\_

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

DATE(S): \_\_\_\_/\_\_\_\_/\_\_\_\_ - \_\_\_\_/\_\_\_\_/\_\_\_\_ AMT: \$ \_\_\_\_\_  
*(If gift)*

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

Made a Speech/Participated in a Panel

Other - Provide Description \_\_\_\_\_

▶ If Gift, Provide Travel Destination \_\_\_\_\_

▶ NAME OF SOURCE *(Not an Acronym)* \_\_\_\_\_

ADDRESS *(Business Address Acceptable)* \_\_\_\_\_

CITY AND STATE \_\_\_\_\_

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

DATE(S): \_\_\_\_/\_\_\_\_/\_\_\_\_ - \_\_\_\_/\_\_\_\_/\_\_\_\_ AMT: \$ \_\_\_\_\_  
*(If gift)*

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

Made a Speech/Participated in a Panel

Other - Provide Description \_\_\_\_\_

▶ If Gift, Provide Travel Destination \_\_\_\_\_

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

**Print** **Clear**

## Instructions – Schedule E Travel Payments, Advances, and Reimbursements

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

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

**You are not required to disclose:**

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

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

**To Complete Schedule E:**

- Disclose the full name (not an acronym) and address of the source of the travel payment.
- Identify the business activity if the source is a business entity.
- Check the box to identify the payment as a gift or income, report the amount, and disclose the date(s).
  - **Travel payments are gifts** if you did not provide services that were equal to or greater in value than the payments received. You must disclose gifts totaling \$500 or more from a single source during the period covered by the statement.

When reporting travel payments that are gifts, you must provide a description of the gift, the **date(s)** received, and the **travel destination**.

- **Travel payments are income** if you provided services that were equal to or greater in value than the

payments received. You must disclose income totaling \$500 or more from a single source during the period covered by the statement. You have the burden of proving the payments are income rather than gifts. When reporting travel payments as income, you must describe the services you provided in exchange for the payment. You are not required to disclose the date(s) for travel payments that are income.

**Example:**

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

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

**Example:**

Mayor Kim travels to China on a trip organized by China Silicon Valley Business Development, a California nonprofit, 501(c)(6) organization. The Chengdu Municipal People's Government pays for Mayor Kim's airfare and travel costs, as well as his meals and lodging during the trip. The trip's agenda shows that the trip's purpose is to promote job creation and economic activity in China and in Silicon Valley, so the trip is reasonably related to a governmental purpose. Thus, Mayor Kim must report the gift of travel,

<small>▶ NAME OF SOURCE (Not an Acronym)</small>	
Chengdu Municipal People's Government	
<small>ADDRESS (Business Address Acceptable)</small>	
2 Caoshi St. CaoShiJie, Qingyang Qu, Chengdu Shi,	
<small>CITY AND STATE</small>	
Sichuan Sheng, China, 610000	
<input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE	
<small>DATE(S):</small> <u>09/04/XX</u> <small>(if gift)</small> <small>AMT: \$</small> 3,874.38	
<small>▶ MUST CHECK ONE:</small> <input checked="" type="checkbox"/> Gift <small>-or-</small> <input type="checkbox"/> Income	
<input type="radio"/> Made a Speech/Participated in a Panel	
<input checked="" type="radio"/> Other - Provide Description <u>Travel reimbursement for trip to China.</u>	
<small>▶ If Gift, Provide Travel Destination</small> <u>Sichuan Sheng, China</u>	

but the gift is exempt from the gift limit. In this case, the travel payments are not subject to the gift limit because the source is a foreign government and because the travel is reasonably related to a governmental purpose. (Section 89506(a)(2).) Note that Mayor Kim could be disqualified from participating in or making decisions about The Chengdu Municipal People's Government for 12 months. Also note that if China Silicon Valley Business Development (a 501(c)(6) organization) paid for the travel costs rather than the governmental organization, the payments would be subject to the gift limits. (See the FPPC fact sheet, Limitations and Restrictions on Gifts, Honoraria, Travel and Loans, at [www.fppc.ca.gov](http://www.fppc.ca.gov).)

## Restrictions and Prohibitions

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

### Gift Prohibition

Gifts received by most state and local officials, employees, and candidates are subject to a limit. In 2021-2022, the gift limit increased to \$520 from a single source during a calendar year. In 2019 and 2020, the gift limit was \$500 from a single source during a calendar year.

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

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

### Disqualification

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

### Honorarium Ban

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

### Loan Restrictions

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

### Post-Governmental Employment

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

### Late Filing

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

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

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

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

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

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

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

## Questions and Answers

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### General

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

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

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

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

### Investment Disclosure

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

## Questions and Answers Continued

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

### Income Disclosure

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

## Questions and Answers Continued

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

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

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

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

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

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

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

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

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

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

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

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

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

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

### Real Property Disclosure

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

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

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

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

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

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

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

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

## Questions and Answers Continued

### Gift Disclosure

- Q. If I received a reportable gift of two tickets to a concert valued at \$100 each, but gave the tickets to a friend because I could not attend the concert, do I have any reporting obligations?
- A. Yes. Since you accepted the gift and exercised discretion and control of the use of the tickets, you must disclose the gift on Schedule D.
- Q. Julia and Jared Benson, a married couple, want to give a piece of artwork to a county supervisor. Is each spouse considered a separate source for purposes of the gift limit and disclosure?
- A. Yes, each spouse may make a gift valued at the gift limit during a calendar year. For example, during 2021 the gift limit was \$520, so the Bensons may have given the supervisor artwork valued at no more than \$1,040. The supervisor must identify Jared and Julia Benson as the sources of the gift.
- Q. I am a Form 700 filer with full disclosure. Our agency holds a holiday raffle to raise funds for a local charity. I bought \$10 worth of raffle tickets and won a gift basket valued at \$120. The gift basket was donated by Doug Brewer, a citizen in our city. At the same event, I bought raffle tickets for, and won a quilt valued at \$70. The quilt was donated by a coworker. Are these reportable gifts?
- A. Because the gift basket was donated by an outside source (not an agency employee), you have received a reportable gift valued at \$110 (the value of the basket less the consideration paid). The source of the gift is Doug Brewer and the agency is disclosed as the intermediary. Because the quilt was donated by an employee of your agency, it is not a reportable gift.
- Q. My agency is responsible for disbursing grants. An applicant (501(c)(3) organization) met with agency employees to present its application. At this meeting, the applicant provided food and beverages. Would the food and beverages be considered gifts to the employees? These employees are designated in our agency's conflict of interest code and the applicant is a reportable source of income under the code.
- A. Yes. If the value of the food and beverages consumed by any one filer, plus any other gifts received from the same source during the reporting period total \$50 or more, the food and beverages would be reported using the fair market value and would be subject to the gift limit.
- Q. I received free admission to an educational conference related to my official duties. Part of the conference fees included a round of golf. Is the value of the golf considered informational material?
- A. No. The value of personal benefits, such as golf, attendance at a concert, or sporting event, are gifts subject to reporting and limits.

## STUDENT SUCCESS PROGRAMS Corporation

### Now accepting applications for Governance Parental Representatives

The qualification of the members of the Board shall correspond to its purposes. The members shall be persons who:

- Submits a resume and letter of intent outlining the applicant's reasons for wanting to join the Board of Directors.
- Demonstrates a strong commitment to quality education.
- Displays sound judgment.
- Shows ability to work effectively with Administration and Board of Directors.
- Excellent communication skills.
- Has displayed positive support of charter concept, including the need for change and accountability.
- Demonstrates the highest standard of professional behavior. Has strong problem-solving techniques.
- Demonstrates a respect for issues relating to confidentiality.
- Possess the skills to publicly represent the Charter School with the highest integrity.
- Demonstrates a willingness and commitment to working on Charter Board business.
- Demonstrates the ability to take on a Program wide perspective to planning.
- Capable of representing the diversity of the community.
- Are open and willing to commit a high level of time and energy to governance activities for the School.
- Commit to attending all Board meetings.
- Has means of transportation to any of the resource centers where Board meetings may be held.
- **Has a student currently enrolled in a charter school operated by the Corporation.**
- **A recommendation from the Parent Representative Applicant student's teacher of record.**

For inquiries, please contact your student's teacher.

To submit your application, please email the board at [board@audeocharterschool.net](mailto:board@audeocharterschool.net)

***Deadline to submit application is April 14, 2022***

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- Has displayed positive support of charter concept, including the need for change and accountability.
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- Demonstrates a respect for issues relating to confidentiality.
- Possess the skills to publicly represent the Charter School with the highest integrity.
- Demonstrates a willingness and commitment to working on Charter Board business.
- Demonstrates the ability to take on a Program wide perspective to planning.
- Capable of representing the diversity of the community.
- Are open and willing to commit a high level of time and energy to governance activities for the School.
- Commit to attending all Board meetings.
- Has means of transportation to any of the resource centers where Board meetings may be held.
- **Has a student currently enrolled in a charter school operated by the Corporation.**
- **A recommendation from the Parent Representative Applicant student's teacher of record.**

For inquiries, please contact your student's teacher.

To submit your application, please email the board at [board@charterschool-sandiego.net](mailto:board@charterschool-sandiego.net)

***Deadline to submit application is April 14, 2022***

# Student Success Programs

Nonprofit Corporation

County of San Diego  
San Diego, California

Audit Report

June 30, 2021

The Charter School of San Diego  
(Charter #28)

Audeo Charter School  
(Charter #406)

  
WILKINSON HADLEY  
KING & CO. LLP  
CPAs AND ADVISORS

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Brian K. Hadley, CPA  
Aubrey W. Mann, CPA  
Kevin A. Sproul, CPA

## Independent Auditor's Report

To the Board of Trustees of  
Student Success Programs  
San Diego, California

### Report on the Financial Statements

We have audited the accompanying financial statements of Student Success Programs, which comprise the statement of financial position as of June 30, 2021, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

### Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

### Auditor's Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the respective financial position of Student Success Programs as of June 30, 2021, and the respective changes in financial position and, where applicable, cash flows thereof for the year then ended in accordance with accounting principles generally accepted in the United States of America.

**Other Matters***Other Information*

Our audit was conducted for the purpose of forming an opinion on the financial statements as a whole. The accompanying schedule of expenditures of federal awards, as required by Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, is presented for purposes of additional analysis and is not a required part of the financial statements. The accompanying additional supplementary information, as required by the *2020-21 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, prescribed in Title 5, *California Code of Regulations*, section 19810 is presented for purposes of additional analysis and is not a required part of the financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated, in all material respects, in relation to the financial statements as a whole.

**Other Reporting Required by *Government Auditing Standards***

In accordance with *Government Auditing Standards*, we have also issued our report dated January 31, 2022, on our consideration of Student Success Programs' internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the School's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the School's internal control over financial reporting and compliance.

*Wilkinson Hadley King & Co LLP*

El Cajon, California  
January 31, 2022

## Financial Statements

**STUDENT SUCCESS PROGRAMS**

## Statement of Financial Position

June 30, 2021

**Assets**

Cash and cash equivalents	\$ 22,801,350
Operating investments	103,900
Accounts receivable	718,265
Accounts receivable - grantor government	5,685,284
Accounts receivable - related entities	94,435
Prepaid expenses	727,993
Security deposits	78,383
Property and equipment, net	23,356,745
Total Assets	<u><u>\$ 53,566,355</u></u>

**Liabilities and Net Assets**

## Liabilities

Accounts payable	\$ 290,412
Accounts payable - grantor government	90,610
Accounts payable - related entity	1,375,473
Accrued payroll and related liabilities	352,965
Accrued vacation liability	327,153
Unearned revenue	477,872
Deferred lease liability	123,827
Capital lease obligations	386,343
Notes and loans payable	8,569,921
Total Liabilities	<u>11,994,576</u>

## Net Assets

Without donor restrictions	
Undesignated	17,294,016
Invested in property and equipment, net of related debt	23,356,745
	<u>40,650,761</u>
With donor restrictions	
Restricted for state programs	921,018
	<u>921,018</u>
Total Net Assets	<u>41,571,779</u>
Total Liabilities and Net Assets	<u><u>\$ 53,566,355</u></u>

The accompanying notes are an integral part of this statement.

## STUDENT SUCCESS PROGRAMS

Statement of Activities  
Year Ended June 30, 2021

	Without Donor Restrictions	Without Donor Restrictions	Total
<b>Revenue, Support, and Gains</b>			
Local Control Funding Formula (LCFF) sources			
State aid	\$ 7,817,466	\$ -	\$ 7,817,466
Education protection account state aid	451,046	-	451,046
Transfers in lieu of property taxes	15,964,548	-	15,964,548
Total LCFF sources	<u>24,233,060</u>	<u>-</u>	<u>24,233,060</u>
Federal contracts and grants	37,578	2,698,778	2,736,356
State contracts and grants	504,117	4,738,885	5,243,002
Local contracts and grants	135,184	-	135,184
Interest and investment earnings	124,471	-	124,471
Net assets released from restriction -			
Grant restrictions satisfied	9,036,624	(9,036,624)	-
Contributions from unrestricted sources	<u>(2,346,851)</u>	<u>2,346,851</u>	<u>-</u>
Total revenue, support, and gains	<u>31,724,183</u>	<u>747,890</u>	<u>32,472,073</u>
<b>Expenses and Losses</b>			
Program services expense	28,809,191	-	28,809,191
Supporting services expense	<u>3,221,816</u>	<u>-</u>	<u>3,221,816</u>
Total expenses and losses	<u>32,031,007</u>	<u>-</u>	<u>32,031,007</u>
<b>Change in Net Assets</b>	(306,824)	747,890	441,066
<b>Net Assets, Beginning of Year</b>	<u>40,957,585</u>	<u>173,128</u>	<u>41,130,713</u>
<b>Net Assets, End of Year</b>	<u>\$ 40,650,761</u>	<u>\$ 921,018</u>	<u>\$ 41,571,779</u>

The accompanying notes are an integral part of this statement.

## STUDENT SUCCESS PROGRAMS

## Statement of Functional Expenses

Year Ended June 30, 2021

	Program Services	Supporting Services	
	Educational Programs	Management and General	Total
Salaries of Officers, Directors & Key Employees	\$ 555,437	\$ 322,789	\$ 878,226
Other salaries and wages	12,737,665	535,782	13,273,447
Pension plan accruals and contributions	3,375,043	152,064	3,527,107
Other employee benefits	3,260,684	156,534	3,417,218
Payroll taxes	253,507	67,320	320,827
Fees for services:	-		
Legal	31,493	73,453	104,946
Accounting	-	12,475	12,475
Special education	1,122,634	-	1,122,634
Professional consulting	34,164	331,686	365,850
District oversight	9,452	378,666	388,118
Temporary agency services	14,442	-	14,442
Other fees	65,599	-	65,599
Advertising and promotion	175,360	15,146	190,506
Office expenses	363,174	7,230	370,404
Information technology	621,759	136,248	758,007
Occupancy	1,961,471	56,409	2,017,880
Travel	89,372	1,784	91,156
Conferences, conventions, and meetings	10,848	8,085	18,933
Interest	23,121	84,486	107,607
Depreciation	1,141,656	308,964	1,450,620
Insurance	5,348	181,630	186,978
Books and supplies	675,278	30,863	706,141
Maintenance, leases and repairs	537,326	226,553	763,879
Other expenses	152,890	133,649	286,539
Transfer of funds to related entity	1,591,468	-	1,591,468
Total expenses included in the expense section on the statement of activities	<u>\$ 28,809,191</u>	<u>\$ 3,221,816</u>	<u>\$ 32,031,007</u>

The accompanying notes are an integral part of this statement.

## STUDENT SUCCESS PROGRAMS

Statement of Cash Flows  
Year Ended June 30, 2021

<b>Cash Flows from Operating Activities</b>	
Receipts from federal, state, and local contracts and grants	\$ 12,643,420
Receipts from property taxes	16,687,750
Receipts from operating interest	161,892
Transfers to related parties	(216,164)
Payments for salaries, benefits and payroll taxes	(21,355,106)
Payments to vendors	(5,230,386)
Payments for facility leases	(1,838,060)
<b>Net Cash From Operating Activities</b>	<u>853,346</u>
<b>Cash Flows from Investing Activities</b>	
Proceeds from sale of operating investments	1,552,349
Purchases of property and equipment	(875,970)
Net proceeds from disposal of property and equipment	216,164
<b>Net Cash Used for Investing Activities</b>	<u>892,543</u>
<b>Cash Flows from Financing Activities</b>	
Proceeds from notes and loans payable	4,759,721
Net proceeds and payments on capital leases	(130,430)
<b>Net Cash Used for Financing Activities</b>	<u>4,629,291</u>
<b>Net Change in Cash and Cash Equivalents</b>	6,375,180
<b>Cash and Cash Equivalents, Beginning of Year</b>	<u>16,426,170</u>
<b>Cash and Cash Equivalents, End of Year</b>	<u>\$ 22,801,350</u>
<b>Reconciliation of Change in Net Assets to Net Cash Used For Operating Activities</b>	
Change in net assets	\$ 441,066
Adjustments to reconcile change in net assets to net cash:	
Depreciation and amortization	1,450,620
Changes in operating assets and liabilities	
(Increase) Decrease in assets	
Accounts receivable	(667,642)
Accounts receivable - grantor government	(1,725,862)
Accounts receivable - related entities	(45,054)
Prepaid expenses	(375,338)
Security deposits	11,289
Increase (Decrease) in liabilities	
Accounts payable	(111,712)
Accounts payable - grantor government	(258)
Accounts payable - related entities	1,370,732
Accrued payroll and related liabilities	13,432
Accrued vacation liability	48,287
Unearned revenue	435,341
Deferred lease liability	8,445
<b>Net Cash From Operating Activities</b>	<u>\$ 853,346</u>

The accompanying notes are an integral part of this statement.

**STUDENT SUCCESS PROGRAMS**

Notes to the Financial Statements

Year Ended June 30, 2021

---

**A. Principal Activity and Summary of Significant Accounting Policies***Organization*

Student Success Programs (the Corporation) is a non-profit public benefit corporation established on March 10, 2003. Under the Charter Schools Act of 1992, a charter school is authorized to elect to operate as, or be operated by, a nonprofit public benefit corporation. The Charter School of San Diego and the Audeo Charter School elected to be operated by Student Success Programs. These charter schools were authorized by San Diego Unified School District (SDUSD). The Corporation is organized and operated exclusively for educational and charitable purposes pursuant to and within the meaning of section 501(c)(3) of the Internal Revenue Code. The specific purposes of this corporation are: (1) to support and benefit, and carry out the purposes of (a) the Charter School of San Diego, a California public charter school and (b) such other public charter schools (“Related Public Charter Schools”) as may be established to provide public education based on the educational and teaching concepts, methods, models, techniques, systems and materials of the Charter School of San Diego (collectively the “Altus Model”); (2) to manage, enhance, improve, disseminate, administer, guide and direct the Altus Model and its use by Related Public Charter Schools.

The Charter School of San Diego was formed on July 1, 1994 as a charter school pursuant to California Education Code §47600 under a charter agreement with San Diego Unified School District. It is a public school that offers independent study instruction to students in grades six through twelve at fourteen resource centers throughout San Diego. Students receive a personalized and rigorous academic experience from highly qualified credentialed faculty. They learn in a safe and supportive environment. Charter School of San Diego is fully accredited by the Western Association of Schools and Colleges.

Audeo Charter School was formed on November 1, 2001 as a charter pursuant to California Education Code §47600 under an agreement with San Diego Unified School District. It is a public school that offers independent study instruction to students in grades kindergarten through twelve at six resource centers throughout San Diego. Students receive a personalized and rigorous academic experience from highly qualified credentialed faculty. They learn in a safe and supportive environment. Audeo Charter School is fully accredited by the Western Association of Schools and Colleges.

The Corporation’s mission is to implement personalized education programs to facilitate student achievement. These educational programs will demonstrate that student-based educational reform can provide a prototype for changing the way teachers teach and students learn in the future. The Corporation operates under the oversight of a board of directors which is comprised of five members.

*Nature of Activities*

The Charter School of San Diego is an educational option designed for students in grades six through twelve. The core instructional method is a modified independent study program. The Corporation designs the students’ course of study around their own personalized education plans. It offers students a rigorous academic experience taught by multi-certificated and specially trained teachers. The Corporation also offers small-group instruction that focuses on building skills around a curriculum that is standards based. This “university model” owes much of its positive outcomes to the unique collaboration between parents, student, and teacher.

**STUDENT SUCCESS PROGRAMS**

Notes to the Financial Statements (Continued)  
Year Ended June 30, 2021

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Audeo Charter School is an educational option designed for students in grades kindergarten through twelve. The core instructional method is a modified independent study program. The Corporation designs the students' course of study around their own personalized education plans. It offers students a rigorous academic experience taught by multi-certificated and specially trained teachers. The Corporation also offers small-group instruction that focuses on building skills around a curriculum that is standards based. This "university model" owes much of its positive outcomes to the unique collaboration between parents, student, and teacher.

*Basis of Accounting*

The financial statements were prepared in accordance with accounting principles generally accepted in the United States of America as applicable to not-for-profit organizations. The Organization uses the accrual basis of accounting, under which revenues are recognized when they are earned, and expenses are recognized in the accounting period in which the liability is incurred.

*Cash and Cash Equivalents*

The Corporation considers all cash and highly liquid financial instruments with original maturities of three months or less, which are neither held for nor restricted by donors for long-term purposes, to be cash and cash equivalents.

*Accounts Receivable*

Accounts receivable consist primarily of noninterest-bearing amounts due to the Corporation for federal, state, and local grants and contracts receivable. The amounts in accounts receivable are considered fully collectable and as such there has not been an allowance for uncollectable accounts or discount established for the Corporation.

*Property and Equipment*

The Corporation records property and equipment additions over \$5,000 at cost, or if donated, at fair value on the date of donation. Depreciation and amortization are computed using the straight-line method over the estimated useful lives of the assets ranging from 3 to 30 years, or in the case of capitalized leased assets or leasehold improvements, the lesser of the useful life of the asset or the lease term. When assets are sold or otherwise disposed of, the cost and related depreciation or amortization are removed from the accounts, and any resulting gain or loss is included in the statements of activities. Costs of maintenance and repairs that do not improve or extend the useful lives of the respective assets are expensed in the current period.

The Corporation reviews the carrying values of property and equipment for impairment whenever events or circumstances indicate that the carrying value of an asset may not be recoverable from the estimated future cash flows expected to result from its use and eventual disposition. When considered impaired an impairment loss is recognized to the extent carrying value exceeds the fair value of the asset. There were no indicators of asset impairment during the year ended June 30, 2021.

*Investments*

The Corporation's method of accounting for investments, in accordance with generally accepted accounting principles, is the fair value method. Fair value is determined by published quotes. Changes in fair value of investments result in increases or decreases in unrealized fair values of equity investments. Adjustments to fair values are reflected as unrealized gain/loss on investments in the accompanying statement of activities. The Corporation's policy is to follow the fair value measurement and reporting requirements contained in FASB ASC 820 *Fair Value Measurements and Disclosures*.

**STUDENT SUCCESS PROGRAMS**  
Notes to the Financial Statements (Continued)  
Year Ended June 30, 2021

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*Net Assets*

Net assets, revenues, gains and losses are classified based on the existence or absence of donor or grantor-imposed restrictions. Accordingly, net assets and changes therein are classified and reported as follows:

*Net Assets Without Donor Restrictions* – Net assets available for use in general operations and not subject to donor (or certain grantor) restrictions.

*Net Assets With Donor Restrictions* – Net assets subject to donor (or certain grantor) imposed restrictions. Some donor-imposed restrictions are temporary in nature, such as those that will be met by the passage of time or other events specified by the donor. Other donor-imposed restrictions are perpetual in nature, where the donor stipulates that resources be maintained in perpetuity. Donor-imposed restrictions are released when a restriction expires, that is, when the stipulated time has elapsed, when the stipulated purpose for which the resource was restricted has been fulfilled, or both.

*Revenue and Revenue Recognition*

The School primarily receives funds from the California Department of Education (CDE). Local Control Funding Formula revenue and state revenues received from CDE are based on the School's average daily attendance (ADA) of students and recognized in the period the ADA occurs.

In addition, the School receives state and local revenues for the enhancement of various educational programs. This assistance is generally received based on applications and submitted to and approved by various granting agencies. This revenue is typically restricted by the grantors and is recorded as restricted. Subsequently, when performance obligations have been met the funds are released from restriction.

*Donated Services and In-Kind Contributions*

Volunteers contribute significant amounts of time to the Corporation's program services, administrating, and fundraising and development activities; however, the financial statements do not reflect the value of these contributed services because they do not meet recognition criteria prescribed by generally accepted accounting principles. Contributed goods are recorded at fair value at the date of donation. We record donated professional services at the respective fair values of the services received. No significant contributions of such goods or services were received during the year ended June 30, 2021.

*Advertising*

Advertising costs are expensed as incurred and approximated \$190,506 during the year ended June 30, 2021.

*Functional Allocation of Expenses*

The costs of program and supporting services activities have been summarized on a functional basis in the statement of activities. The statement of functional expenses presents the natural classification detail of expenses by function. Accordingly, certain costs have been allocated among the program and supporting services benefited.

*Estimates*

The preparation of financial statements in conformity with generally accepted accounting principles requires the Corporation to make estimates and assumptions that affect the reported amounts of assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates, and those differences could be material.

**STUDENT SUCCESS PROGRAMS**

Notes to the Financial Statements (Continued)  
Year Ended June 30, 2021

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*Income Taxes*

The Corporation is a 509(a)(1) publicly supported non-profit Corporation that is exempt from income taxes under Sections 501(a) and 501(c)(3) of the Internal Revenue Code. The Corporation is also exempt from California franchise or income tax under Section 23701d of the California Revenue and Taxation Code. The Corporation may be subject to tax on income which is not related to its exempt purpose. For the year ended June 30, 2021, no such unrelated business income was reported and, therefore, no provision for income taxes has been made.

The Corporation follows provisions of uncertain tax positions as addressed in ASC 958. The Corporation recognizes accrued interest and penalties associated with uncertain tax positions as part of the income tax provision, when applicable. There are no amounts accrued in the financial statements related to uncertain tax positions for the year ended June 30, 2021.

*Financial Instruments and Credit Risk*

The Corporation manages deposit concentration risk by placing cash, money market accounts, and certificates of deposit with financial institutions believed by the Corporation to be creditworthy. At times, amounts on deposit may exceed insured limits or include uninsured investments in money market mutual funds. To date, the Corporation has not experienced losses in any of these accounts. Credit risk associated with accounts receivable is considered to be limited due to high historical collection rates and because substantial portions of the outstanding amounts are due from government agencies. Investments are made by diversified investment managers whose performance is monitored by The Corporation and the investment committee of the Board of Directors. Although the fair values of investments are subject to fluctuation on a year-to-year basis, The Corporation believes that the investment policies and guidelines are prudent for the long-term welfare of the organization.

*LCFF Revenues and Payments in Lieu of Property Taxes*

The Corporation's primary funding source is a combination of local property taxes and state revenues. The California Department of Education computes the local control funding formula (LCFF) on statewide charter school rates multiplied by the schools' average daily attendance (ADA) as reported at the second principal apportionment period (P2). The result is then reduced by property tax revenues transferred from the District to the school, which is funding in lieu of property taxes, and education protection account funds paid by the state under proposition 30. The remaining balance is paid from the state general fund, in the form of LCFF State Aid. LCFF funding sources, inclusive of state and local sources, made up 74.6% of the Corporation's revenue.

The LCFF includes the following components applicable to the Corporation:

1. Provides a base grant for each school based on the school's ADA. The actual base grant varies based on grade span.
2. Provides an adjustment of 2.6 percent on the base grant amount for grades nine through twelve.
3. Provides a supplemental grant equal to 20 percent of the adjusted base grants for targeted disadvantaged students. Targeted students are those classified as English learners (EL), eligible to receive a free or reduced-price meal (FRPM), foster youth, homeless youth, or any combination of these factors (unduplicated count).
4. Provides a concentration grant equal to 50 percent of the adjusted base grant for targeted students exceeding 55 percent of the school's enrollment.

The Corporation is not at risk of losing these funding sources, as long as the schools maintain a steady level of ADA, as these funding sources are mandated by the California State Constitution to fund schools.

**STUDENT SUCCESS PROGRAMS**  
Notes to the Financial Statements (Continued)  
Year Ended June 30, 2021

*New Accounting Guidance*

The Financial Accounting Standards Board (FASB) issues accounting standards updates and additional guidance for not-for-profit and for-profit agencies to establish consistent accounting across all organizations in the United States. The following table represents items that have been issued by FASB that became effective in the 2020-21 fiscal year:

Description	Date Issued
FASB Accounting Standards Update 2017-11 - <i>Earnings Per Share (Topic 260)</i>	Jan-18
FASB Accounting Standards Update 2017-11 - <i>Distinguishing Liabilities from Equity (Topic 480)</i>	Jan-18
FASB Accounting Standards Update 2017-11 - <i>Derivatives and Hedging (Topic 815)</i>	Jan-18
FASB Accounting Standards Update 2019-05 - <i>Financial Instruments, Credit Losses (Topic 326)</i>	May-19
FASB Accounting Standards Update 2019-11 - <i>Codification Improvements to Financial Instruments, Credit Losses (Topic 326)</i>	Nov-19
FASB Accounting Standards Update 2020-03 - <i>Codification Improvements to Financial Instruments</i>	Mar-20
FASB Accounting Standards Update 2020-04 - <i>Reference Rate Reform (Topic 848)</i>	Mar-20
FASB Accounting Standards Update 2021-01 - <i>Reference Rate Reform (Topic 848)</i>	Jan-21
FASB Accounting Standards Update 2021-03 - <i>Intangibles Goodwill and Other (Topic 350)</i>	Mar-21

These updates were issued to provide clarification and simplification in accounting for certain transactions. In addition, they provide for additional note disclosures to create transparency involving these transactions. The School has adopted provisions of effective Accounting Standards Updates. The implementation of these items did not result in a change to financial presentation for the School.

*Subsequent Events*

In preparing these financial statements, the Corporation has evaluated events and transactions for potential recognition or disclosure through January 31, 2022, the date the financial statements were available to be issued.

**STUDENT SUCCESS PROGRAMS**  
Notes to the Financial Statements (Continued)  
Year Ended June 30, 2021

**B. Liquidity and Availability**

Financial assets available for general expenditure, that is, without donor or other restrictions limiting their use, within one year of the statement of financial position date, comprise the following:

	Charter School of San Diego	Audeo Charter School	Student Success Programs Corporation	Total
Cash and cash equivalents	\$ 18,377,038	\$ 3,327,572	\$ 1,096,740	\$ 22,801,350
Operating investments	103,900	-	-	103,900
Accounts receivable	538,931	179,334	-	718,265
Accounts receivable - grantor government	4,019,383	1,665,901	-	5,685,284
Accounts receivable - related entities	7,950	86,485	-	94,435
Intracompany receivables	3,844	175	-	4,019
	<u>\$ 23,051,046</u>	<u>\$ 5,259,467</u>	<u>\$ 1,096,740</u>	<u>\$ 29,407,253</u>

As part of the Corporation's liquidity management plan, The Corporation invests cash in excess of daily requirements in short-term investments, CDs, and money market funds.

**C. Fair Value Measurements and Disclosures**

The Corporation reports certain assets and liabilities at fair value in the financial statements. Fair value is the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction in the principal, or most advantageous, market at the measurement date under current market conditions regardless of whether that price is directly observable or estimated using another valuation technique. Inputs used to determine fair value refer broadly to the assumptions that market participants would use in pricing the asset or liability, including assumptions about risk. Inputs may be observable or unobservable. Observable inputs are inputs that reflect the assumptions market participants would use in pricing the asset or liability based on market data obtained from sources independent of the reporting entity. Unobservable inputs are inputs that reflect the reporting entity's own assumptions about the assumptions market participants would use in pricing the asset or liability based on the best information available. A three-tier hierarchy categorizes the inputs as follows:

- Level 1: Quoted prices (unadjusted) in active markets for identical assets or liabilities that we can access at the measurement date.
- Level 2: Inputs other than quoted prices included within Level 1 that are observable for the asset or liability, either directly or indirectly. These include quoted prices for similar assets or liabilities in active markets, quoted prices for identical or similar assets or liabilities in markets that are not active, inputs other than quoted prices that are observable for the asset or liability, and market-corroborated inputs.
- Level 3: Unobservable inputs for the asset or liability. In these situations, the Corporation develops inputs using the best information available in the circumstances.

**STUDENT SUCCESS PROGRAMS**  
Notes to the Financial Statements (Continued)  
Year Ended June 30, 2021

In some cases, the inputs used to measure the fair value of an asset or a liability might be categorized within different levels of the fair value hierarchy. In those cases, the fair value measurement is categorized in its entirety in the same level of the fair value hierarchy as the lowest level input that is significant to the measurement. Assessing the significance of a particular input to entire measurement requires judgment, taking into account factors specific to the asset or liability. The categorization of an asset within the hierarchy is based upon the pricing transparency of the asset and does not necessarily correspond to the Corporation's assessment of the quality, risk, or liquidity profile of the asset or liability.

The following table presents assets and liabilities measured at fair value on a recurring basis at June 30, 2021:

Assets	Total	Quoted Prices in Active Markets for Identical Assets (Level 1)	Significant Other Observable Inputs (Level 2)	Significant Unobservable Inputs (Level 3)
Operating investments:				
Certificate of deposit	\$ 103,900	\$ 103,900	\$ -	\$ -

#### **D. Cash and Cash Equivalents**

Cash and cash equivalents at June 30, 2021 consisted of the following:

	Charter School of San Diego	Audeo Charter School	Student Success Programs Corporation	Total
Cash in county treasury	\$ 6,964,874	\$ 2,296,302	\$ -	\$ 9,261,176
Cash in bank accounts	2,129,525	619,567	371,871	3,120,963
Cash equivalents	7,382,639	386,703	724,869	8,494,211
Cash with fiscal agent	1,900,000	25,000	-	1,925,000
Total cash and cash equivalents	<u>\$ 18,377,038</u>	<u>\$ 3,327,572</u>	<u>\$ 1,096,740</u>	<u>\$ 22,801,350</u>

#### *Cash in County Treasury*

The Corporation is a voluntary participant and therefore maintain a portion of its cash in the San Diego County Treasury as part of the common investment pool (\$9,261,176 as of June 30, 2021). The County Treasury is restricted by Government Code §53635 pursuant to §53601 to invest in time deposits, U.S. Government Securities, state registered warrants, notes or bonds, State Treasurer's investment pool, banker's acceptances, commercial paper, negotiable certificates of deposit, and repurchase or reverse agreements.

The fair value of the Corporations' investment in this pool is reported in the accompanying financial statements at amounts based upon the Corporation's pro-rata share of the fair value provided by the County Treasury for the entire County Treasury portfolio (in relation to the amortized cost of that portfolio). The balance available for withdrawal is based on the accounting records maintained by the County Treasury, which are recorded on an amortized cost basis. Cash may be added or withdrawn from the investment pool without limitation.

## STUDENT SUCCESS PROGRAMS

Notes to the Financial Statements (Continued)  
Year Ended June 30, 2021

*Cash Equivalents*

The Corporation maintains a portion of their funds in short term investments with maturities less than three months in length (\$8,494,211 as of June 30, 2021). These cash equivalents consist of United States Government Money Market Funds. These funds are not FDIC insured and are therefore exposed to custodial credit risk. The Corporation does not anticipate any losses as a result of this risk. Cash may be added or withdrawn from the money market accounts without limitation.

*Cash with Fiscal Agent*

The Corporation maintains a portion of their cash (\$1,925,000 as of June 30, 2021) with the San Diego County Schools Fringe Benefits Consortium (FBC). The funds are held by the FBC as a reserve for benefits payable.

*Cash in Bank*

The remainder of the Corporation's cash (\$3,120,963 as of June 30, 2021) is held in financial institutions which are either insured by the Federal Deposit Insurance Corporation (FDIC) up to a limit of \$250,000 per depositor or certain non-interest-bearing accounts that are fully insured by the FDIC. As of June 30, 2021, The Corporation held \$2,620,963 in excess of the FDIC insured amounts. The Corporation reduces its exposure to risk by maintaining such deposits with high quality financial institutions. The Corporation has not experienced any losses in such accounts and believe it is not exposed to any significant credit risk.

**E. Accounts Receivable**

As of June 30, 2021, accounts receivable consisted of the following:

	<u>Charter School of San Diego</u>	<u>Audeo Charter School</u>	<u>Total</u>
Interest receivable	\$ 13,395	4,606	\$ 18,001
Other local sources	525,536	174,728	700,264
Total Accounts Receivable	<u>\$ 538,931</u>	<u>\$ 179,334</u>	<u>\$ 718,265</u>
	<u>Charter School of San Diego</u>	<u>Audeo Charter School</u>	<u>Total</u>
Federal Government			
Special Education	\$ 285,661	\$ 79,485	\$ 365,146
ESSA CSI	-	94,238	94,238
ESSER	419,401	408,563	827,964
Other Federal Programs	8,055	3,137	11,192
State Government			
LCFF State Aid	1,666,549	492,011	2,158,560
Lottery	114,725	44,993	159,718
Special Education	336,824	121,108	457,932
Mental Health	201,344	44,232	245,576
CTE Grant	11,205	27,392	38,597
Local Government			
In lieu of property taxes	975,619	350,742	1,326,361
Total Accounts Receivable - Grantor Governments	<u>\$ 4,019,383</u>	<u>\$ 1,665,901</u>	<u>\$ 5,685,284</u>

**STUDENT SUCCESS PROGRAMS**  
Notes to the Financial Statements (Continued)  
Year Ended June 30, 2021

**F. Prepaid Expenses**

As of June 30, 2021, prepaid expenses consisted of the following:

	Charter School of San Diego	Audeo Charter School	Total
Prepaid rent and leases	\$ 123,104	\$ 13,426	\$ 136,530
Prepaid vendors	488,678	102,785	591,463
<b>Total Prepaid Expenses</b>	<b>\$ 611,782</b>	<b>\$ 116,211</b>	<b>\$ 727,993</b>

**G. Property and Equipment**

Property and equipment for Charter School of San Diego consisted of the following at June 30, 2021:

<u>Charter School of San Diego</u>	Beginning Balance	Additions	Deletions	Ending Balance
<b>Non-Depreciable Capital Assets</b>				
Land	\$ 6,119,672	\$ -	\$ -	\$ 6,119,672
Work in Progress	2,375,403	524,496	699,488	2,200,411
<b>Total Non-Depreciable Capital Assets</b>	<b>8,495,075</b>	<b>524,496</b>	<b>699,488</b>	<b>8,320,083</b>
<b>Depreciable Capital Assets</b>				
Land Improvements	102,475	-	-	102,475
Buildings	9,938,308	295,512	-	10,233,820
Leasehold Improvements	3,394,640	463,867	-	3,858,507
Equipment, Furniture, and Fixtures	1,671,364	97,592	75,018	1,693,938
<b>Total Depreciable Capital Assets</b>	<b>15,106,787</b>	<b>856,971</b>	<b>75,018</b>	<b>15,888,740</b>
<b>Total Capital Assets</b>	<b>23,601,862</b>	<b>1,381,467</b>	<b>774,506</b>	<b>24,208,823</b>
<b>Less Accumulated Depreciation</b>	<b>(3,791,081)</b>	<b>(1,036,013)</b>	<b>(75,018)</b>	<b>(4,752,076)</b>
<b>Capital Assets, Net</b>	<b>\$ 19,810,781</b>	<b>\$ 345,454</b>	<b>\$ 699,488</b>	<b>\$ 19,456,747</b>

Property and equipment for Audeo Charter School consisted of the following at June 30, 2021:

<u>Audeo Charter School</u>	Beginning Balance	Additions	Deletions	Ending Balance
<b>Non-Depreciable Capital Assets</b>				
Work in Progress	\$ 2,280,439	\$ 165,518	\$ 323,745	\$ 2,122,212
<b>Total Non-Depreciable Capital Assets</b>	<b>2,280,439</b>	<b>165,518</b>	<b>323,745</b>	<b>2,122,212</b>
<b>Depreciable Capital Assets</b>				
Leasehold Improvements	2,331,556	278,154	655,957	1,953,753
Equipment, Furniture, and Fixtures	584,335	74,064	42,905	615,494
<b>Total Depreciable Capital Assets</b>	<b>2,915,891</b>	<b>352,218</b>	<b>698,862</b>	<b>2,569,247</b>
<b>Total Capital Assets</b>	<b>5,196,330</b>	<b>517,736</b>	<b>1,022,607</b>	<b>4,691,459</b>
<b>Less Accumulated Depreciation</b>	<b>(859,552)</b>	<b>(414,607)</b>	<b>(482,698)</b>	<b>(791,461)</b>
<b>Capital Assets, Net</b>	<b>\$ 4,336,778</b>	<b>\$ 103,129</b>	<b>\$ 539,909</b>	<b>\$ 3,899,998</b>

**STUDENT SUCCESS PROGRAMS**  
Notes to the Financial Statements (Continued)  
Year Ended June 30, 2021

Combined property and equipment consisted of the following at June 30, 2021:

<u>Combined Student Success Programs</u>	<u>Beginning Balance</u>	<u>Additions</u>	<u>Deletions</u>	<u>Ending Balance</u>
<b>Non-Depreciable Capital Assets</b>				
Land	\$ 6,119,672	\$ -	\$ -	\$ 6,119,672
Work in Progress	4,655,842	690,014	1,023,233	4,322,623
Total Non-Depreciable Capital Assets	<u>10,775,514</u>	<u>690,014</u>	<u>1,023,233</u>	<u>10,442,295</u>
<b>Depreciable Capital Assets</b>				
Land Improvements	102,475	-	-	102,475
Buildings	9,938,308	295,512	-	10,233,820
Leasehold Improvements	5,726,196	742,021	655,957	5,812,260
Equipment, Furniture, and Fixtures	2,255,699	171,656	117,923	2,309,432
Total Depreciable Capital Assets	<u>18,022,678</u>	<u>1,209,189</u>	<u>773,880</u>	<u>18,457,987</u>
Total Capital Assets	28,798,192	1,899,203	1,797,113	28,900,282
Less Accumulated Depreciation	(4,650,633)	(1,450,620)	(557,716)	(5,543,537)
Capital Assets, Net	<u>\$ 24,147,559</u>	<u>\$ 448,583</u>	<u>\$ 1,239,397</u>	<u>\$ 23,356,745</u>

#### **H. Accounts Payable**

As of June 30, 2021, accounts payable consists of the following:

	<u>Charter School of San Diego</u>	<u>Audeo Charter School</u>	<u>Total</u>
Vendors payable	\$ 67,083	\$ 65,258	\$ 132,341
Sponsoring school district	56,096	57,054	113,150
Other current liabilities	33,602	11,319	44,921
Total accounts payable	<u>\$ 156,781</u>	<u>\$ 133,631</u>	<u>\$ 290,412</u>

	<u>Charter School of San Diego</u>	<u>Audeo Charter School</u>	<u>Total</u>
California clean energy grant	\$ 6,871	\$ 9,196	\$ 16,067
College readiness block grant	74,543	-	74,543
Total accounts payable - grantor government	<u>\$ 81,414</u>	<u>\$ 9,196</u>	<u>\$ 90,610</u>

#### **I. Unearned Revenue**

As of June 30, 2021, unearned revenue consisted of:

	<u>Charter School of San Diego</u>	<u>Audeo Charter School</u>	<u>Total</u>
ESSA School Improvement	\$ 9,649	\$ 44,387	\$ 54,036
Career Technical Education Incentive Grant	109,977	313,859	423,836
Total Unearned Revenue	<u>\$ 119,626</u>	<u>\$ 358,246</u>	<u>\$ 477,872</u>

**STUDENT SUCCESS PROGRAMS**  
Notes to the Financial Statements (Continued)  
Year Ended June 30, 2021

The following table provides information about significant changes in unearned revenue for the year ended June 30, 2021:

	Charter School of San Diego	Audeo Charter School	Total
Unearned Revenue, beginning of period	\$ -	\$ 42,531	\$ 42,531
Increases in deferred revenue due to cash received during the period	119,626	358,246	477,872
Decreases in deferred revenue due to performance obligations met during the period	-	(42,531)	(42,531)
Unearned Revenue, end of period	<u>\$ 119,626</u>	<u>\$ 358,246</u>	<u>\$ 477,872</u>

**J. Net Assets With Donor Restrictions**

Net assets with donor restrictions are restricted for the following purposes or periods at June 30, 2021:

	Charter School of San Diego	Audeo Charter School	Total
Subject to expenditure for specified purpose:			
California Clean Energy Jobs Act	\$ 65,213	\$ 39,818	\$ 105,031
Classified School Employee Prof. Development Block Grant	571	2,792	3,363
Expanded Learning Opportunities Grant	<u>599,224</u>	<u>213,400</u>	<u>812,624</u>
Total net assets with donor restrictions	<u>\$ 665,008</u>	<u>\$ 256,010</u>	<u>\$ 921,018</u>

Net assets were released from donor restrictions by incurring expenses satisfying the restricted purpose as follows for the year ended June 30, 2021:

	Charter School of San Diego	Audeo Charter School	Total
Beginning restricted net assets	\$ 126,444	\$ 46,684	\$ 173,128
Restricted grants received	5,063,973	2,373,690	7,437,663
Contributions from unrestricted sources	1,756,251	590,600	2,346,851
Net assets released from restriction:			
Restricted purpose satisfied	<u>(6,281,660)</u>	<u>(2,754,964)</u>	<u>(9,036,624)</u>
Ending restricted net assets	<u>\$ 665,008</u>	<u>\$ 256,010</u>	<u>\$ 921,018</u>

**K. Loan Payable**

On May 8, 2020, the Corporation was approved for \$3,810,200 in Paycheck Protection Program (PPP) Loan from the Small Business Administration. The PPP, established as part of the Coronavirus Aid, Relief and Economic Securities Act (CARES Act), provides for loans to qualifying businesses for amounts up to 2.5 times of the average monthly payroll expenses of the qualifying business. The loans and accrued interest are forgivable after 24 weeks as long as the borrower uses the loan proceeds for eligible purposes, including payroll, benefits, rent and utilities, and maintains its payroll levels. The Corporation demonstrated full compliance and the loan was forgiven in full on July 29, 2021.

**STUDENT SUCCESS PROGRAMS**

Notes to the Financial Statements (Continued)  
Year Ended June 30, 2021

On December 11, 2020, the Corporation entered into a promissory note agreement with the Bank of Southern California for a loan of \$2,500,000. The loan carries a variable interest rate equal to the Libor Base Rate. At the time of the note the resulting interest rate was 3.150%. At June 30, 2021 the rate had decreased to 3.095%. Interest accrual at year end was \$39,721 resulting in a total amount due of \$2,539,721. The Corporation fully repaid principal and accrued interest on August 6, 2021.

On March 30, 2021, the Corporation entered into a Charter School Pooled Revenue Anticipation Notes loan with the California School Finance Authority for a loan of \$2,220,000. Loan costs of \$46,330 were paid up front. The full principal of \$2,220,000 became due and was paid in full on August 27, 2021. The effective interest rate on the loan was 2.09%.

**L. Leases**

The Corporation leases office space under various operating leases and copy machines under various capital leases expiring at various dates through 2026.

Future minimum lease payments are as follows:

Year Ended June 30	Capital Leases	Operating Leases
2022	\$ 134,360	\$ 1,491,086
2023	126,052	1,197,969
2024	119,112	862,422
2025	39,705	155,304
2026	-	44,276
Total minimum lease payments	419,229	\$ 3,751,057
Less amount representing interest	(32,886)	
Capital lease obligation	\$ 386,343	

Rent expense for facilities leases for the year ended June 30, 2021, totaled \$1,846,505. In accordance with generally accepted accounting principles, rent is expensed on a straight-line method. The difference between rent expense and cash payments for rent is a deferred lease liability of \$123,827.

**M. Employee Retirement System**

Qualified employees are covered under multiple-employer defined benefit pension plans by agencies of the State of California. Certificated employees are members of the California State Teachers' Retirement System (CalSTRS) and classified employees are members of the California Public Employees' Retirement System (CalPERS). The risks of participating in these multi-employer plans are different from single-employer plans in the following aspects:

## STUDENT SUCCESS PROGRAMS

Notes to the Financial Statements (Continued)  
Year Ended June 30, 2021

- Assets contributed to the multi-employer plan by one employer may be used to provide benefits to employees of the other participating employers.
- If a participating employer stops contributing to the plan, the unfunded obligations of the plan may be borne by the remaining participating employers.
- If the Corporation choose to stop participating in some of its multi-employer plans, the Corporation may be required to pay those plans an amount based on the underfunded status of the plan, referred to as a withdrawal liability.

The Corporation's participation in these plans for the fiscal year ended June 30, 2021, is outlined in the table below. The "EIN/Pension Plan Number" column provides the Employee Identification Number (EIN) and the three-digit plan number, if applicable. Unless otherwise noted, the most recent Pension Protection Act (PPA) zone status available in 2021, 2020 and 2019 is for the plan's year-end at June 30, 2021, 2020 and 2019, respectively. The zone status is based on information that the School received from the plan and is certified by the plan's actuary. Among other factors, plans in the red zone are generally less than 65% funded, plans in the yellow zone are less than 80% funded, and plans in the green zone are at least 80% funded. The "FIP/RP Status Pending/Implemented" column indicates plans for which a financial improvement plan (FIP) or a rehabilitation plan (RP) is either pending or has been implemented.

*Period to Period Comparability:*

There are no economic or other factors that affect period to period comparability as presented below.

Pension Fund	EIN/ Pension Plan Number	Pension Protection Act Zone Status Year Ended June 30,			FIP/RP Status Pending/ Implemented	
		2021	2020	2019		
<b>Charter School of San Diego</b>						
CalSTRS	37069	Yellow	Yellow	Yellow	No	
CalPERS	2894216509	Yellow	Yellow	Yellow	No	
<b>Audeo Charter School</b>						
CalSTRS	37058	Yellow	Yellow	Yellow	No	
CalPERS	588503125	Yellow	Yellow	Yellow	No	
Pension Fund		Contributions			Number of Employees	Surcharge Imposed
		2021	2020	2019		
<b>Charter School of San Diego</b>						
CalSTRS	\$ 2,206,392	\$ 2,082,574	\$ 2,394,805	125	No	
CalPERS	350,604	557,505	838,392	32	No	
<b>Audeo Charter School</b>						
CalSTRS	902,223	791,245	797,839	63	No	
CalPERS	67,888	115,355	167,540	12	No	
Total	<u>\$ 3,527,107</u>	<u>\$ 3,546,679</u>	<u>\$ 4,198,576</u>	<u>232</u>		

**STUDENT SUCCESS PROGRAMS**

Notes to the Financial Statements (Continued)  
Year Ended June 30, 2021

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**CalSTRS:**

The Schools contribute to the California State Teachers' Retirement System (CalSTRS), a cost-sharing multiple employer public employee retirement system defined benefit pension plan administered by CalSTRS. Required contribution rates are set by the California Legislature and detailed in Teachers' Retirement Law. Contribution rates are expressed as a level of percentage of payroll using the entry age normal actuarial cost method. CalSTRS also uses the level of percentage of payroll method to calculate the amortization of any unfunded liability. Copies of the STRS annual report may be obtained from the STRS, 7667 Folsom Boulevard, Sacramento, California 95826.

For the fiscal year ended June 30, 2021, active plan members were required to contribute between 10.205% and 10.25% of their salary, depending on their hire date. The employer contribution rate was 16.15% of annual payroll. CalSTRS issues a separate comprehensive annual financial report that includes financial statements and required supplementary information. The School made contributions as noted above. For the year ended June 30, 2021, the State contributed \$1,169,964 (10.238% of certificated salaries) on behalf of the Corporation.

**CalPERS:**

The School contributes to the School Employer Pool under the California Public Employees' Retirement System (CalPERS), a cost-sharing multiple employer public employee retirement system defined benefit pension plan administered by CalPERS. The plan provides retirement and disability benefits, annual cost of living adjustments, and death benefits to plan members and beneficiaries. Benefit provisions are established by state statutes, as legislatively amended, with the Public Employees' Retirement Law. CalPERS issues a separate comprehensive annual financial report that includes financial statements and required supplementary information. Copies of the CalPERS annual financial report may be obtained from the CalPERS Executive Office, 400 P Street, Sacramento, California 95814.

Active plan members are required to contribute 7% of their salary and the School is required to contribute an actuarially determined rate. The actuarial methods and assumptions used for determining the rate are those adopted by the CalPERS Board of Administration. The required employer contribution rate for fiscal year 2020-21 was 20.70% of classified salaries. The School made contributions as noted above.

**N. Joint Ventures (Joint Powers Agreements)**

The Corporation participates in two joint powers agreement (JPA) entities, the San Diego County Schools Risk Management (SDCSRM) and the San Diego County Schools Fringe Benefits Consortium (FBC).

The JPAs arrange for and provide for various types of insurances for its member districts and charter schools as requested. The JPAs are governed by boards consisting of one or more representatives from each member. The boards control the operations of the JPAs, including selection of management and approval of operating budgets, independent of any influence by the member districts and schools beyond their representation on the boards. Each member district and school pay a premium commensurate with the level of coverage requested and shares surpluses and deficits proportionate to their participation in the JPAs.

Information on JPAs financials can be obtained by contacting the JPAs directly at 6401 Linda Vista Road, San Diego, CA 92111.

**STUDENT SUCCESS PROGRAMS**  
Notes to the Financial Statements (Continued)  
Year Ended June 30, 2021

**O. Related Party Transactions**

Related parties as defined by generally accepted accounting standards include:

1. Affiliates of the entity,
2. Management and members of their immediate families, or
3. Other parties that can significantly influence management or operating policies.

Student Success Programs, Audeo Charter School Corporation, and Mirus Education are affiliated through common executive management. In order to benefit from cost savings associated with sharing of employees, bulk purchasing, and other negotiations that benefit all three organizations, the organizations reimburse such expenses to the organization paying the transaction if there are any.

During the year ended June 30, 2021, the Corporation made a transfer to Audeo Charter School Corporation in the amount of \$1,591,468 in order to transfer fund balance generated by a school site that was originally part of one of the Corporation's charter schools into a newly established charter school for the school site. The establishment of the new charter school resulted from the Corporation curing an order to comply with geographic location restrictions under Education Code §47605.1 as amended by Assembly Bill 1505 and Assembly Bill 1507.

The following represent related party accounts receivable at June 30, 2021:

<u>Affiliated Organization</u>	<u>Receivable</u>	<u>Purpose</u>	<u>Repayment Term</u>
Audeo Charter School Corporation	\$ 93,231	Reimburse expenses	Due within 90 days
Mirus Education	1,204	Reimburse expenses	Due within 90 days
Total	<u>\$ 94,435</u>		

The following represent related party accounts payable at June 30, 2021:

<u>Affiliated Organization</u>	<u>Payable</u>	<u>Purpose</u>	<u>Repayment Term</u>
Audeo Charter School Corporation	\$ 1,375,304	Transfer of fund balance	Due within 90 days
Mirus Education	169	Reimburse expenses	Due within 90 days
Total	<u>\$ 1,375,473</u>		

**P. Other Charter School Requirements**

1. Each school administers to each pupil the achievement test designed by the California State Board of Education, such as CAASPP, ELPAC, and Physical Fitness Test.
2. All teachers hold a valid California Teaching Credential.
3. Each school has complied with the state requirements relating to the number of instructional days.

**STUDENT SUCCESS PROGRAMS**  
Notes to the Financial Statements (Continued)  
Year Ended June 30, 2021

**Q. Upcoming Changes in Accounting Pronouncements**

The Financial Accounting Standards Board (FASB) has issued the following Accounting Standards Updates (ASU) that become effective over the next few fiscal years:

Description	Date Issued	Fiscal Year Effective
FASB Accounting Standards Update 2016-02 - <i>Leases (Topic 842)</i>	Feb-16	2022-23
FASB Accounting Standards Update 2016-13 - <i>Credit Losses (Topic 326)</i>	Jun-16	2023-24
FASB Accounting Standards Update 2017-04 - <i>Intangibles, Goodwill &amp; Other (Topic 350)</i>	Jan-17	2023-24
FASB Accounting Standards Update 2017-12 - <i>Derivatives and Hedging (Topic 815)</i>	Aug-17	2021-22
FASB Accounting Standards Update 2018-01 - <i>Leases (Topic 842)</i>	Jan-18	2022-23
FASB Accounting Standards Update 2018-10 - <i>Codification Improvements to Topic 842 Leases</i>	Jul-18	2021-22
FASB Accounting Standards Update 2018-11 - <i>Leases Targeted Improvements (Topic 842)</i>	Jul-18	2022-23
FASB Accounting Standards Update 2018-12 - <i>Financial Services Insurance (Topic 944)</i>	Aug-18	2024-25
FASB Accounting Standards Update 2018-14 - <i>Compensation, Retirement Benefits - Defined Benefit Plans (Topic 715-20)</i>	Aug-18	2022-23
FASB Accounting Standards Update 2018-15 - <i>Intangibles, Goodwill and Other, Internal Use Software (Topic 350-40)</i>	Aug-18	2021-22
FASB Accounting Standards Update 2018-16 - <i>Derivatives and Hedging (Topic 815)</i>	Oct-18	2021-22
FASB Accounting Standards Update 2018-17 - <i>Consolidation (Topic 810)</i>	Oct-18	2021-22
FASB Accounting Standards Update 2018-18 - <i>Collaborative Arrangements (Topic 808)</i>	Nov-18	2021-22
FASB Accounting Standards Update 2018-19 - <i>Codification Improvements for Credit Losses (Topic 326)</i>	Nov-18	2023-24
FASB Accounting Standards Update 2018-20 - <i>Leases (Topic 842)</i>	Dec-18	2022-23
FASB Accounting Standards Update 2019-01 - <i>Leases (Topic 842)</i>	Mar-19	2022-23
FASB Accounting Standards Update 2019-02 - <i>Entertainment Film Costs (Topic 926-20)</i>	Mar-19	2021-22
FASB Accounting Standards Update 2019-09 - <i>Financial Services, Insurance (Topic 944)</i>	Nov-19	2024-25
FASB Accounting Standards Update 2019-10 - <i>Financial Instruments, Credit Losses</i>	Nov-19	2023-24

**STUDENT SUCCESS PROGRAMS**  
Notes to the Financial Statements (Continued)  
Year Ended June 30, 2021

Description	Date Issued	Fiscal Year Effective
FASB Accounting Standards Update 2019-10 - <i>Derivatives and Hedging (Topic 815)</i>	Nov-19	2021-22
FASB Accounting Standards Update 2019-12 - <i>Income Taxes (Topic 740)</i>	Dec-19	2022-23
FASB Accounting Standards Update 2020-01 - <i>Investments (Topics 321, 323, and 815)</i>	Jan-20	2022-23
FASB Accounting Standards Update 2020-05 - <i>Revenue from Contracts with Customers (Topic 606)</i>	Jun-20	2022-23
FASB Accounting Standards Update 2020-05 - <i>Leases (Topic 842)</i>	Jun-20	2022-23
FASB Accounting Standards Update 2020-06 - <i>Debt (Topic 470-20)</i>	Aug-20	2024-25
FASB Accounting Standards Update 2020-06 - <i>Derivatives and Hedging (Topic 815-40)</i>	Aug-20	2024-25
FASB Accounting Standards Update 2020-07 - <i>Not-For-Profit Entities (Topic 958)</i>	Sep-20	2021-22
FASB Accounting Standards Update 2020-08 - <i>Codification Improvements for Receivables (Topic 310-20)</i>	Oct-20	2022-23
FASB Accounting Standards Update 2020-10 - <i>Codification Improvements</i>	Nov-20	2025-26
FASB Accounting Standards Update 2021-02 - <i>Franchisors Revenue (Topic 952-606)</i>	Jan-21	2022-23
FASB Accounting Standards Update 2021-04 - <i>Earnings Per Share (Topic 260)</i>	May-21	2022-23
FASB Accounting Standards Update 2021-04 - <i>Debt Modifications and Extinguishments (Topic 470-50)</i>	May-21	2022-23
FASB Accounting Standards Update 2021-04 - <i>Stock Compensation (Topic 718)</i>	May-21	2022-23
FASB Accounting Standards Update 2021-04 - <i>Derivatives and Hedging (Topic 815-40)</i>	May-21	2022-23
FASB Accounting Standards Update 2021-05 - <i>Leases (Topic 842)</i>	Jul-21	2022-23
FASB Accounting Standards Update 2021-07 - <i>Stock Compensation (Topic 718)</i>	Oct-21	2022-23
FASB Accounting Standards Update 2021-08 - <i>Business Combinations (Topic 805)</i>	Oct-21	2024-25
FASB Accounting Standards Update 2021-09 - <i>Leases (Topic 842)</i>	Nov-21	2022-23

These updates were issued to provide clarification and simplification in accounting for certain transactions. In addition, they provide for additional note disclosures to create transparency involving these transactions. The updates effective during the future fiscal years are not expected to impact the financial accounting or presentation for the School.

**STUDENT SUCCESS PROGRAMS**  
Notes to the Financial Statements (Continued)  
Year Ended June 30, 2021

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**R. COVID-19 Impact and Considerations**

In March 2020 the World Health Organization declared the outbreak of the novel coronavirus COVID-19 a global pandemic. The nature of the pandemic resulted in a mandatory school property closure affecting the Student Success Programs from March 16, 2020 and continuing into the Fall of 2020-21 school year. California Governor Gavin Newsom issued a state-wide executive order mandating that schools remain closed until the county in which the school is located is off the COVID-19 watch list for fourteen consecutive days. The school operated by Student Success Programs continued with independent study programs for their students during the mandated school closure period. Resource centers re-opened in October 2020 on modified schedules in accordance with the Corporations re-opening plan that included enhanced safety measures and personal protective equipment for employees and students.

In addition to school closures, new regulations and safety measures were required to be put in place by all schools in California as part of a re-opening plan. Student Success Programs has established a re-opening plan that they believe will provide a safe environment for the students and teachers.

The federal and state government have provided schools with temporary funds to assist in the additional costs that resulted from the COVID-19 pandemic. Additionally, no attendance was reported for the 2020-21 fiscal year with all local education agencies, including charter schools, continuing funding based on 2019-20 reported attendance. Already offering an independent study model, Student Success Programs was able to adapt quickly and provide the same exceptional level of service to students as were provided prior to the pandemic. Additionally, Student Success Programs has added services for students to address pandemic related issues, including mental health concerns.

**STUDENT SUCCESS PROGRAMS**  
Notes to the Financial Statements (Continued)  
Year Ended June 30, 2021

**S. Subsequent Events**

Subsequent to fiscal year end the Corporation entered into new facility lease agreements. The agreements provide for monthly payments that vary each year. The leases vary in length from twenty-four months to sixty months.

Future minimum lease payments under the agreements are as follows:

Charter School of San Diego			
Year Ended June 30,	Rent Expense	Lease Payments	Deferred Rent
2022	\$ 96,444	\$ 90,722	\$ 5,722
2023	144,314	138,530	11,506
2024	144,314	143,606	12,214
2025	144,314	147,176	9,353
2026	144,314	150,762	2,905
Thereafter	47,871	50,776	-
Total	<u>\$ 721,571</u>	<u>\$ 721,572</u>	

Audeo Charter School			
Year Ended June 30,	Rent Expense	Lease Payments	Deferred Rent
2022	\$ 30,858	\$ 30,105	\$ 753
2023	41,144	41,646	251
2024	10,286	10,537	-
Total	<u>\$ 82,288</u>	<u>\$ 82,288</u>	

## Supplementary Information

**Student Success Programs**  
**Combining Statement of Financial Position**  
**June 30, 2021**

	Charter School of San Diego	Audeo Charter School	Student Success Programs Corporation	Elimination	Total
<b>Assets</b>					
Cash and cash equivalents	\$ 18,377,038	\$ 3,327,572	\$ 1,096,740	\$ -	\$ 22,801,350
Operating investments	103,900	-	-	-	103,900
Accounts receivable	538,931	179,334	-	-	718,265
Accounts receivable - grantor government	4,019,383	1,665,901	-	-	5,685,284
Accounts receivable - related entities	7,950	86,485	-	-	94,435
Intracompany receivables	3,844	175	-	(4,019)	-
Prepaid expenses	611,782	116,211	-	-	727,993
Security deposits	58,771	19,612	-	-	78,383
Property and equipment, net	19,456,747	3,899,998	-	-	23,356,745
Total Assets	<u>\$ 43,178,346</u>	<u>\$ 9,295,288</u>	<u>\$ 1,096,740</u>	<u>\$ (4,019)</u>	<u>\$ 53,566,355</u>
<b>Liabilities and Net Assets</b>					
<b>Liabilities</b>					
Accounts payable	\$ 156,781	\$ 133,631	\$ -	\$ -	\$ 290,412
Accounts payable - grantor government	81,414	9,196	-	-	90,610
Accounts payable - related entity	169	1,375,304	-	-	1,375,473
Accrued payroll and related liabilities	255,297	97,668	-	-	352,965
Accrued vacation liability	294,666	32,487	-	-	327,153
Intracompany payables	175	3,844	-	(4,019)	-
Unearned revenue	119,626	358,246	-	-	477,872
Deferred lease liability	101,940	21,887	-	-	123,827
Capital lease obligations	299,044	87,299	-	-	386,343
Notes and loans payable	7,118,443	1,451,478	-	-	8,569,921
Total Liabilities	<u>8,427,555</u>	<u>3,571,040</u>	<u>-</u>	<u>(4,019)</u>	<u>11,994,576</u>
<b>Net Assets</b>					
Without donor restrictions					
Undesignated	14,629,036	1,568,240	1,096,740	-	17,294,016
Invested in property and equipment, net of related debt	19,456,747	3,899,998	-	-	23,356,745
	<u>34,085,783</u>	<u>5,468,238</u>	<u>1,096,740</u>	<u>-</u>	<u>40,650,761</u>
With donor restrictions					
Restricted for state programs	665,008	256,010	-	-	921,018
	<u>665,008</u>	<u>256,010</u>	<u>-</u>	<u>-</u>	<u>921,018</u>
Total Net Assets	<u>34,750,791</u>	<u>5,724,248</u>	<u>1,096,740</u>	<u>-</u>	<u>41,571,779</u>
Total Liabilities and Net Assets	<u>\$ 43,178,346</u>	<u>\$ 9,295,288</u>	<u>\$ 1,096,740</u>	<u>\$ (4,019)</u>	<u>\$ 53,566,355</u>

See Accompanying Notes to Supplementary Information

## Student Success Programs

### Combining Statement of Activities

June 30, 2021

	Charter School of San Diego		Audeo Charter School		Student Success Programs Corporation	Total		Total
	Without Donor Restrictions	With Donor Restrictions	Without Donor Restrictions	With Donor Restrictions	Without Donor Restrictions	Without Donor Restrictions	Without Donor Restrictions	
<b>Revenue, Support, and Gains</b>								
Local Control Funding Formula (LCFF) sources								
State aid	\$ 5,927,702	\$ -	\$ 1,889,764	\$ -	\$ -	\$ 7,817,466	\$ -	\$ 7,817,466
Education protection account state aid	331,772	-	119,274	-	-	451,046	-	451,046
Transfers in lieu of property taxes	11,742,904	-	4,221,644	-	-	15,964,548	-	15,964,548
Total LCFF sources	<u>18,002,378</u>	<u>-</u>	<u>6,230,682</u>	<u>-</u>	<u>-</u>	<u>24,233,060</u>	<u>-</u>	<u>24,233,060</u>
Federal contracts and grants	27,286	1,767,909	10,292	930,869	-	37,578	2,698,778	2,736,356
State contracts and grants	366,243	3,296,064	137,874	1,442,821	-	504,117	4,738,885	5,243,002
Local contracts and grants	98,637	-	36,547	-	-	135,184	-	135,184
Interest and investment earnings	85,117	-	37,508	-	1,846	124,471	-	124,471
Net assets released from restriction -								
Grant restrictions satisfied	6,281,660	(6,281,660)	2,754,964	(2,754,964)	-	9,036,624	(9,036,624)	-
Contributions from unrestricted sources	<u>(1,756,251)</u>	<u>1,756,251</u>	<u>(590,600)</u>	<u>590,600</u>	<u>-</u>	<u>(2,346,851)</u>	<u>2,346,851</u>	<u>-</u>
Total revenue, support, and gains	<u>23,105,070</u>	<u>538,564</u>	<u>8,617,267</u>	<u>209,326</u>	<u>1,846</u>	<u>31,724,183</u>	<u>747,890</u>	<u>32,472,073</u>
<b>Expenses and Losses</b>								
Program services expense	19,504,304	-	9,304,887	-	-	28,809,191	-	28,809,191
Supporting services expense	<u>2,450,329</u>	<u>-</u>	<u>765,856</u>	<u>-</u>	<u>5,631</u>	<u>3,221,816</u>	<u>-</u>	<u>3,221,816</u>
Total expenses and losses	<u>21,954,633</u>	<u>-</u>	<u>10,070,743</u>	<u>-</u>	<u>5,631</u>	<u>32,031,007</u>	<u>-</u>	<u>32,031,007</u>
<b>Change in Net Assets</b>	1,150,437	538,564	(1,453,476)	209,326	(3,785)	(306,824)	747,890	441,066
<b>Net Assets, Beginning of Year</b>	<u>32,935,346</u>	<u>126,444</u>	<u>6,921,714</u>	<u>46,684</u>	<u>1,100,525</u>	<u>40,957,585</u>	<u>173,128</u>	<u>41,130,713</u>
<b>Net Assets, End of Year</b>	<u>\$ 34,085,783</u>	<u>\$ 665,008</u>	<u>\$ 5,468,238</u>	<u>\$ 256,010</u>	<u>\$ 1,096,740</u>	<u>\$ 40,650,761</u>	<u>\$ 921,018</u>	<u>\$ 41,571,779</u>

See Accompanying Notes to Supplementary Information

**Student Success Programs**  
Combining Statement of Functional Expenses  
June 30, 2021

	Charter School of San Diego		Audeo Charter School		Student Success Programs Corporation	Total		Total
	Program Services	Supporting Services	Program Services	Supporting Services	Supporting Services	Program Services	Supporting Services	
	Educational Programs	Management and General	Educational Programs	Management and General	Management and General	Educational Programs	Management and General	
Salaries of Officers, Directors & Key Employees	\$ 431,026	\$ 273,170	\$ 124,411	\$ 49,619	\$ -	\$ 555,437	\$ 322,789	\$ 878,226
Other salaries and wages	9,063,738	445,329	3,673,927	90,453	-	12,737,665	535,782	13,273,447
Pension plan accruals and contributions	2,432,990	124,006	942,053	28,058	-	3,375,043	152,064	3,527,107
Other employee benefits	2,311,098	117,338	949,586	39,196	-	3,260,684	156,534	3,417,218
Payroll taxes	188,737	55,393	64,770	11,927	-	253,507	67,320	320,827
Fees for services:						-		
Legal	15,031	37,469	16,462	35,984	-	31,493	73,453	104,946
Accounting	-	9,725	-	2,750	-	-	12,475	12,475
Special education	822,744	-	299,890	-	-	1,122,634	-	1,122,634
Professional consulting	27,819	253,790	6,345	72,856	5,040	34,164	331,686	365,850
District oversight	6,398	186,646	3,054	192,020	-	9,452	378,666	388,118
Temporary agency services	-	-	14,442	-	-	14,442	-	14,442
Other fees	18,118	-	47,481	-	-	65,599	-	65,599
Advertising and promotion	159,046	14,799	16,314	347	-	175,360	15,146	190,506
Office expenses	260,618	7,102	102,556	128	-	363,174	7,230	370,404
Information technology	460,655	98,539	161,104	37,709	-	621,759	136,248	758,007
Occupancy	1,601,596	35,665	359,875	20,744	-	1,961,471	56,409	2,017,880
Travel	59,964	1,414	29,408	370	-	89,372	1,784	91,156
Conferences, conventions, and meetings	8,478	8,085	2,370	-	-	10,848	8,085	18,933
Interest	17,309	73,948	5,812	10,538	-	23,121	84,486	107,607
Depreciation	746,447	289,566	395,209	19,398	-	1,141,656	308,964	1,450,620
Insurance	3,821	141,542	1,527	39,497	591	5,348	181,630	186,978
Books and supplies	418,192	19,602	257,086	11,261	-	675,278	30,863	706,141
Maintenance, leases and repairs	352,437	169,245	184,889	57,308	-	537,326	226,553	763,879
Other expenses	98,042	87,956	54,848	45,693	-	152,890	133,649	286,539
Transfer of funds to related entity	-	-	1,591,468	-	-	1,591,468	-	1,591,468
Total expenses included in the expense section on the statement of activities	\$ 19,504,304	\$ 2,450,329	\$ 9,304,887	\$ 765,856	\$ 5,631	\$ 28,809,191	\$ 3,221,816	\$ 32,031,007

See Accompanying Notes to Supplementary Information

**Student Success Programs**  
Combining Statement of Cash Flows  
June 30, 2021

	Charter School of San Diego	Audeo Charter School	Student Success Programs Corporation	Total
<b>Cash Flows from Operating Activities</b>				
Receipts from federal, state, and local contracts and grants	\$ 8,786,580	\$ 3,856,840	\$ -	\$ 12,643,420
Receipts from property taxes	12,260,431	4,427,319	-	16,687,750
Receipts from operating interest	110,792	49,254	1,846	161,892
Transfers to related parties	-	(216,164)	-	(216,164)
Payments for salaries, benefits and payroll taxes	(15,393,700)	(5,961,406)	-	(21,355,106)
Payments to vendors	(3,393,848)	(1,830,907)	(5,631)	(5,230,386)
Payments for facility leases	(1,497,615)	(340,445)	-	(1,838,060)
<b>Net Cash From Operating Activities</b>	<u>872,640</u>	<u>(15,509)</u>	<u>(3,785)</u>	<u>853,346</u>
<b>Cash Flows from Investing Activities</b>				
Proceeds from sale of operating investments	1,300,560	-	251,789	1,552,349
Purchases of property and equipment	(681,979)	(193,991)	-	(875,970)
Net proceeds from disposal of property and equipment	-	216,164	-	216,164
<b>Net Cash Used for Investing Activities</b>	<u>618,581</u>	<u>22,173</u>	<u>251,789</u>	<u>892,543</u>
<b>Cash Flows from Financing Activities</b>				
Proceeds from notes and loans payable	4,203,225	556,496	-	4,759,721
Net proceeds and payments on capital leases	(86,371)	(44,059)	-	(130,430)
<b>Net Cash Used for Financing Activities</b>	<u>4,116,854</u>	<u>512,437</u>	<u>-</u>	<u>4,629,291</u>
<b>Net Change in Cash and Cash Equivalents</b>	5,608,075	519,101	248,004	6,375,180
<b>Cash and Cash Equivalents, Beginning of Year</b>	<u>12,768,963</u>	<u>2,808,471</u>	<u>848,736</u>	<u>16,426,170</u>
<b>Cash and Cash Equivalents, End of Year</b>	<u>\$ 18,377,038</u>	<u>\$ 3,327,572</u>	<u>\$ 1,096,740</u>	<u>\$ 22,801,350</u>
<b>Reconciliation of Change in Net Assets to Net Cash Used For Operating Activities</b>				
Change in net assets	\$ 1,689,001	\$ (1,244,150)	\$ (3,785)	\$ 441,066
Adjustments to reconcile change in net assets to net cash:				
Depreciation and amortization	1,036,013	414,607	-	1,450,620
Changes in operating assets and liabilities				
(Increase) Decrease in assets				
Accounts receivable	(500,538)	(167,104)	-	(667,642)
Accounts receivable - grantor government	(1,170,731)	(555,131)	-	(1,725,862)
Accounts receivable - related entities	41,431	(86,485)	-	(45,054)
Prepaid expenses	(358,055)	(17,283)	-	(375,338)
Security deposits	379	10,910	-	11,289
Increase (Decrease) in liabilities				
Accounts payable	(61,062)	(50,650)	-	(111,712)
Accounts payable - grantor government	(193)	(65)	-	(258)
Accounts payable - related entities	169	1,370,563	-	1,370,732
Accrued payroll and related liabilities	1,947	11,485	-	13,432
Accrued vacation liability	47,178	1,109	-	48,287
Unearned revenue	119,626	315,715	-	435,341
Deferred lease liability	31,144	(22,699)	-	8,445
<b>Net Cash From Operating Activities</b>	<u>\$ 872,640</u>	<u>\$ (15,509)</u>	<u>\$ (3,785)</u>	<u>\$ 853,346</u>

**STUDENT SUCCESS PROGRAMS**

Organization Structure  
Year Ended June 30, 2021

Student Success Programs was formed on March 10, 2003 and operates two charter schools. The Charter School of San Diego (Charter #28) was established in 1994, Audeo Charter School (Charter #406) was established in 2001. The authorizing entity for both schools is San Diego Unified School District.

**GOVERNING BOARD**

<b>Name</b>	<b>Office</b>	<b>Term and Term Expiration</b>
Admiral Len Hering	Chairman	Two Year Term Expires June 30, 2022
Jane Gawronski	Member	Two Year Term Resigned September 28, 2021
Scott Barton	Member	Two Year Term Expires June 30, 2021
Eric Schweinfurter	Member	Two Year Term Expires June 30, 2022
David Crean	Member	Two Year Term Expires June 30, 2022

**ADMINISTRATION**

Mary Searcy Bixby  
Founder, President and CEO

Lynne Herrero Alipio  
CBO and CFO, Treasurer

Angela Neri  
Secretary

**STUDENT SUCCESS PROGRAMS**

Schedule of Instructional Time  
Year Ended June 30, 2021

**Charter School of San Diego (#28)**

<u>Grade Level</u>	<u>Minimum Daily Minutes Offered</u>	<u>Instructional Days Offered Multi-Track Calendar</u>	<u>J-13A Credited Days</u>	<u>Status</u>
6th Grade	N/A	175	N/A	Complied
7th Grade	N/A	175	N/A	Complied
8th Grade	N/A	175	N/A	Complied
9th Grade	N/A	175	N/A	Complied
10th Grade	N/A	175	N/A	Complied
11th Grade	N/A	175	N/A	Complied
12th Grade	N/A	175	N/A	Complied

N/A – Charter School of San Diego is a non-classroom based charter school, therefore, the instructional time requirements are not applicable to the school.

**Audeo Charter School (#406)**

<u>Grade Level</u>	<u>Minimum Daily Minutes Offered</u>	<u>Instructional Days Offered Multi-Track Calendar</u>	<u>J-13A Credited Days</u>	<u>Status</u>
Kindergarten	N/A	175	N/A	Complied
1st Grade	N/A	175	N/A	Complied
2nd Grade	N/A	175	N/A	Complied
3rd Grade	N/A	175	N/A	Complied
4th Grade	N/A	175	N/A	Complied
5th Grade	N/A	175	N/A	Complied
6th Grade	N/A	175	N/A	Complied
7th Grade	N/A	175	N/A	Complied
8th Grade	N/A	175	N/A	Complied
9th Grade	N/A	175	N/A	Complied
10th Grade	N/A	175	N/A	Complied
11th Grade	N/A	175	N/A	Complied
12th Grade	N/A	175	N/A	Complied

N/A – Audeo Charter School is a non-classroom based charter school, therefore, the instructional time requirements are not applicable to the school.

**STUDENT SUCCESS PROGRAMS**  
Schedule of Financial Trends and Analysis  
Year Ended June 30, 2021

	Budget 2022	2021	2020	2019
Revenues	\$ 32,881,884	\$ 32,472,073	\$ 30,132,469	\$ 30,256,622
Expenses	<u>31,895,427</u>	<u>32,031,007</u>	<u>29,358,019</u>	<u>29,196,583</u>
Change in Net Assets	<u>986,457</u>	<u>441,066</u>	<u>774,450</u>	<u>1,060,039</u>
Ending Net Assets	<u>\$ 42,558,236</u>	<u>\$ 41,571,779</u>	<u>\$ 41,130,713</u>	<u>\$ 40,356,263</u>
Unrestricted Net Assets	<u>\$ 42,558,236</u>	<u>\$ 40,650,761</u>	<u>\$ 40,957,585</u>	<u>\$ 40,111,814</u>
Unrestricted net assets as a percentage of total expenses	<u>133.43%</u>	<u>126.91%</u>	<u>139.51%</u>	<u>137.39%</u>
Total Long Term Debt	<u>\$ 55,235</u>	<u>\$ 8,956,264</u>	<u>\$ 516,773</u>	<u>\$ 68,201</u>
ADA at P2	<u>2,386</u>	<u>N/A</u>	<u>2,255</u>	<u>2,248</u>

The Corporation's ending net assets has increased by \$1,215,516 (3%) over the past two fiscal years. The significant increase is in large due to growth in average daily attendance (ADA) and additional funding received as a result of the COVID-19 pandemic. Restricted ending net assets include multi-year grants that will be expended over the next one to three years.

As a result of the COVID-19 pandemic there was no attendance reporting for the 2020-21 fiscal year. Each LEA was funded based on the 2019-20 average daily attendance (ADA) reported.

Long term debt has increased by \$8,888,063 over the past two fiscal years.

The 2021-22 budget is presented for purposes of analysis only and has not been audited. Net assets are projected to increase by \$986,457 and ADA is projected to be 2,386 for the 2021-22 fiscal year.

**STUDENT SUCCESS PROGRAMS**
 Reconciliation of Unaudited Financial Report Alternative Form with Audited Financial Statements  
 Year Ended June 30, 2021
 

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	<u>Charter School of San Diego</u>	<u>Audeo Charter School</u>
June 30, 2021 annual financial alternative form net assets:	\$ 34,750,790	\$ 5,724,248
Adjustments and reclassifications:		
Rounding	<u>1</u>	<u>-</u>
Total adjustments and reclassifications	<u>1</u>	<u>-</u>
June 30, 2021 audited financial statements net assets:	<u>\$ 34,750,791</u>	<u>\$ 5,724,248</u>

**STUDENT SUCCESS PROGRAMS**  
Schedule of Expenditures of Federal Awards  
Year Ended June 30, 2021

Federal Grantor/Pass Through Grantor/ Program or Cluster Title	Federal CFDA Number	Pass-Through Entity Identifying Number	Subrecipient Expenditures	Student Success Program Expenditures		Total Federal Expenditures
				Charter School of San Diego	Audeo Charter School	
<b>SPECIAL EDUCATION (IDEA) CLUSTER:</b>						
<u>U.S. Department of Education</u>						
Passed through California Department of Education						
IDEA Basic Local Assistance	84.027	13379	\$ -	\$ 191,780	\$ 67,454	\$ 259,234
IDEA Mental Health	84.027	14468	-	81,785	14,771	96,556
Total Special Education (IDEA) Cluster			-	273,565	82,225	355,790
<b>OTHER PROGRAMS:</b>						
<u>U.S. Department of Treasury</u>						
Passed through California Department of Education						
Coronavirus Relief Fund: Learning Loss Mitigation	21.019	25516	-	91,029	12,503	103,532
<u>U.S. Department of Education</u>						
Direct Program:						
Impact Aid			-	27,286	10,292	37,578
Passed through California Department of Education						
Title I	84.010	14329	-	382,479	106,625	489,104
Title III - English Learners	84.365	14346	-	21,226	4,824	26,050
Title II - Supporting Effective Instruction	84.367	14341	-	45,692	14,590	60,282
Title IV - Student Support & Academic Enrichment	84.424	15396	-	31,034	10,000	41,034
ESSA: School Improvement Funding for LEAs	84.377	15127	-	46,332	164,098	210,430
CARES Act - Elementary & Secondary School Emergency Relief	84.425D	15536	-	336,114	93,699	429,813
CARES Act - Elementary & Secondary School Emergency Relief II	84.425D	15547	-	540,438	337,420	877,858
CARES Act - Elementary & Secondary School Emergency Relief III	84.425D	15559	-	-	104,885	104,885
Total Other Programs			-	1,521,630	858,936	2,380,566
<b>TOTAL EXPENDITURES OF FEDERAL AWARDS</b>			\$ -	\$ 1,795,195	\$ 941,161	\$ 2,736,356

See Accompanying Notes to Required Schedule of Expenditures of Federal Awards.

## STUDENT SUCCESS PROGRAMS

Notes to the Schedule of Expenditures of Federal Awards  
Year Ended June 30, 2021

### Basis of Presentation

The accompanying schedule of expenditures of federal awards includes the federal grant activity of the Corporation and is presented on the accrual basis of accounting. The information in this schedule is presented in accordance with requirements of 2 CFR §200.502 *Basis for Determining Federal Awards Expended* and 2CFR §200.510(b) *Schedule of Expenditures of Federal Awards*. Therefore, some amounts presented in this schedule may differ from amounts presented in, or used in the preparation of, the financial statements.

### Summary of Significant Accounting Policies

The expenditures reported on the schedule are recognized following the cost principles contained in the Uniform Guidance, wherein certain types of expenditures are not allowable or are limited as to reimbursement. Negative amounts shown on the Schedule, if any, represent adjustments or credits made in the normal course of business to amounts reported as expenditures in prior years.

### Indirect Cost Rate

Indirect costs were calculated in accordance with 2 CFR §200.412 *Direct and Indirect Costs*. The Corporation used an indirect cost rate of 5.00% based on the rate approved by the California Department of Education for each program which did not have a pre-defined allowable indirect cost rate. The Corporation did not elect to use the 10% de minimis cost rate as covered in 2 CFR §200.414 *Indirect Costs*.

### Schoolwide Program

The Corporation operated “schoolwide programs” at the Charter School of San Diego and Audeo Charter School. Using federal funding, schoolwide programs are designed to upgrade an entire educational program within a school for all students, rather than limiting services to certain targeted students. The following federal program amounts were expended by The Corporation in its schoolwide program:

Program	CFDA #	Amount Expended
Title I	84.010	\$ 489,104

### Personal Protective Equipment (PPE) (Unaudited)

As a result of the COVID-19 Pandemic the Corporation received personal protective equipment (PPE) valued at \$10,073 from the federal government.

## STUDENT SUCCESS PROGRAMS

Notes to Supplementary Information  
Year Ended June 30, 2021

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### A. Purpose of Schedules

#### Combining Statement of Financial Position

This schedule provides the information by school which combines into the Corporation's overall statement of net position, with eliminations for activities between the schools within the Corporation.

#### Combining Statement of Activities

This schedule provides the information by school which combines into the Corporation's overall statement of activities.

#### Combining Statement of Functional Expenses

This schedule provides the information by school which combines into the Corporation's overall statement of functional expenses.

#### Combining Statement of Cash Flows

This schedule provides the information by school which combines into the Corporation's overall statement of cash flows.

#### Organization Structure

This schedule provides information about the Schools' charter numbers, district of authorization, members of the governing board, and members of administration.

#### Schedule of Instructional Time

This schedule provides information regarding compliance with Education Code §47612.

Compliance with Education Code §47612 includes the following:

- 1) Charter schools may operate up to 5 tracks for attendance reporting.
- 2) Each track must be operated for a minimum of 175 days.
- 3) Each track must offer the required number of instructional minutes specified in Education Code §47612.5.
- 4) No track shall have less than 55% of its school days before April 15 each school year.

Compliance with Education Code §47612.5 involves offering a minimum number of annual instructional minutes as defined by grade level. Under Senate Bill 98 and Senate Bill 820, for the 2020-21 fiscal year, there is no minimum annual or minimum daily instructional minutes requirement for non-classroom based charter schools in existence during the 2019-20 fiscal year.

An LEA that closed due to a qualifying emergency in the 2020-21 fiscal year may submit a Form J-13A to avoid a penalty for not meeting the annual instructional day requirements. The School did not have an emergency closure and as such there are no credited days to account for on the Schedule of Instructional Time.

## STUDENT SUCCESS PROGRAMS

Notes to Supplementary Information, Continued  
Year Ended June 30, 2021

### Schedule of Financial Trends and Analysis

Budget information for 2022 is presented for analysis purposes only and is based on estimates of the 2021-22 fiscal year. The information has not been subject to audit.

This schedule discloses the Corporation's financial trends by displaying past years' data along with current year budget information. These financial trend disclosures are used to evaluate the School's ability to continue as a going concern for a reasonable period of time.

The Corporation will develop a budget for a single year that supports the goals of each school. When preparing the annual budget, the Schools consider factors such as student population; past years' experience and trends; need for new services, expansion or curtailment of existing services; estimated revenues and proposed expenditures; and governing board priorities.

The budget process includes:

- Enrollment projections and staffing ratios
- Income projections and LCFF calculation
- Audit of personnel database: Changes in staffing, new positions, vacant positions, full-time equivalency calculation and salary movement in the salary schedule such as salary step increases
- Employee Benefits: Determine rates to use in projecting benefits for retirement contributions, social security, unemployment insurance and workers' compensation; and estimates increases regarding component costs of health and welfare benefit costs
- Monitor Governor's budget items for education program
- Monitor legislation or initiatives that impact funding
- Contracts in process and negotiations with key suppliers
- Non-personnel budgets based on goals and past years' experience and trends
- Fixed costs such as utilities, facility leases, service agreements and insurance

The Governing Board approves the budget by May or June of each year for the subsequent fiscal year. The budget is monitored and revised throughout the fiscal year to ensure that it depicts the financial operations and strategic goals are met. Normally, there are three cycles for adopted budget i.e. Preliminary Budget, February Revised Budget, and May Revised Budget.

Operating financial statements are provided to the governing board in its scheduled board meetings.

### Reconciliation of Unaudited Financial Report Alternative Form with Audited Financial Statements

This schedule provides the information necessary to reconcile the fund balance as reported on the Unaudited Financial Report Alternative Forms prepared by the schools to the net assets reported in the audited financial statements.

## Other Independent Auditors' Reports

Independent Auditor's Report on Compliance for Each Major Program and on  
Internal Control Over Compliance Required by the Uniform Guidance

To the Board of Directors  
Student Success Programs  
San Diego, California

**Report on Compliance for Each Major Federal Program**

We have audited Student Success Programs' compliance with the types of compliance requirements described in the *OMB Compliance Supplement* that could have a direct and material effect on each of Student Success Programs' major federal programs for the year ended June 30, 2021. Student Success Programs' major federal programs are identified in the summary of auditor's results section of the accompanying schedule of findings and questioned costs.

**Management's Responsibility**

Management is responsible for compliance with federal statutes, regulations, and the terms and conditions of its federal awards applicable to its federal programs.

**Auditor's Responsibility**

Our responsibility is to express an opinion on compliance for each of Student Success Programs' major federal programs based on our audit of the types of compliance requirements referred to above. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and the audit requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Those standards and the Uniform Guidance require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major federal program occurred. An audit includes examining, on a test basis, evidence about Student Success Programs' compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

We believe that our audit provides a reasonable basis for our opinion on compliance for each major federal program. However, our audit does not provide a legal determination of Student Success Programs' compliance.

**Opinion on Each Major Federal Program**

In our opinion, Student Success Programs complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended June 30, 2021.

## Report on Internal Control Over Compliance

Management of Student Success Programs is responsible for establishing and maintaining effective internal control over compliance with the types of compliance requirements referred to above. In planning and performing our audit of compliance, we considered Student Success Programs' internal control over compliance with the types of requirements that could have a direct and material effect on each major federal program to determine the auditing procedures that are appropriate in the circumstances for the purpose of expressing an opinion on compliance for each major federal program and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of Student Success Programs' internal control over compliance.

*A deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. *A material weakness in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. *A significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

*Wilkinson Hadley King & Co LLP*

El Cajon, California

January 31, 2022

Independent Auditor's Report on Internal Control Over Financial Reporting and on  
Compliance and Other Matters Based on an Audit of Financial Statements  
Performed in Accordance with *Government Auditing Standards*

To the Board of Directors  
Student Success Programs  
San Diego, California

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of Student Success Programs, as of and for the year ended June 30, 2021, and the related notes to the financial statements, which collectively comprise Student Success Program's basic financial statements, and have issued our report thereon dated January 31, 2022.

#### **Internal Control over Financial Reporting**

In planning and performing our audit of the financial statements, we considered Student Success Programs' internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of Student Success Programs' internal control. Accordingly, we do not express an opinion on the effectiveness of Student Success Programs' internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

#### **Compliance and Other Matters**

As part of obtaining reasonable assurance about whether Student Success Programs' financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

**Purpose of this Report**

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the School's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering Student Success Programs' internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

*Wilkinson Hadley King & Co LLP*

El Cajon, California  
January 31, 2022

## Independent Auditor's Report on State Compliance

To the Board of Directors  
Student Success Programs  
San Diego, California

### **Report on State Compliance**

We have audited the Student Success Programs' compliance with the types of compliance requirements described in the *2020-21 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, prescribed in Title 5, *California Code of Regulations*, Section 19810, that could have a direct and material effect on each of the Schools' state programs identified below for the fiscal year ended June 30, 2021.

### **Management's Responsibility for State Compliance**

Management is responsible for compliance with the requirements of laws, regulations, contracts, and grants applicable to its state programs.

### **Auditor's Responsibility**

Our responsibility is to express an opinion on compliance for each applicable program as identified in the State's Audit Guide *2020-21 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance*, prescribed in Title 5, *California Code of Regulations*, Section 19810. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards* issued by the comptroller General of the United States; and the State's audit guide *2020-21 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, prescribed in Title 5, *California Code of Regulations*, Section 19810. Those standards and audit guide require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the compliance requirements referred to above that could have a direct and material effect on the state programs noted below. An audit includes examining, on a test basis, evidence about each school's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances. We believe that our audit provides a reasonable basis for our opinion. Our audit does not provide a legal determination of the Schools' compliance with those requirements.

In connection with the audit referred to above, we selected and tested transactions and records to determine the School’s compliance with state laws and regulations applicable to the following items:

Description	Procedures Performed	
	Charter School of San Diego	Audeo Charter School
<b>Local Education Agencies Other Than Charter Schools</b>		
A. Attendance and Distance Learning.....	N/A	N/A
B. Teacher Certification and Misassignments.....	N/A	N/A
C. Kindergarten Continuance.....	N/A	N/A
F. Instructional Time.....	N/A	N/A
G. Instructional Materials.....	N/A	N/A
H. Ratio of Administrative Employees to Teachers.....	N/A	N/A
I. Classroom Teacher Salaries.....	N/A	N/A
J. Early Retirement Incentive.....	N/A	N/A
K. Gann Limit Calculation.....	N/A	N/A
L. School Accountability Report Card.....	N/A	N/A
O. K-3 Grade Span Adjustment.....	N/A	N/A
Q. Apprenticeship: Related and Supplemental Instruction.....	N/A	N/A
R. Comprehensive School Safety Plan.....	N/A	N/A
S. District of Choice.....	N/A	N/A
<b>School Districts, County Offices of Education, and Charter Schools</b>		
T. California Clean Energy Jobs Act.....	Yes	Yes
V. Proper Expenditure of Education Protection Account Funds.....	Yes	Yes
W. Unduplicated Local Control Funding Formula Pupil Counts.....	Yes	Yes
<b>Charter Schools</b>		
Y. Independent Study - Course Based.....	N/A	N/A
AA. Attendance.....	Yes	Yes
BB. Mode of Instruction.....	N/A	N/A
CC. Nonclassroom Based Instruction/Independent Study.....	Yes	Yes
DD. Determination of Funding for Nonclassroom Based Instruction.....	Yes	Yes
FF. Charter School Facility Grant Program.....	N/A	N/A

The term N/A is used above to mean either the School did not offer the program during the current fiscal year or the program applies to a different type of local education agency.

## Opinion on State Compliance

In our opinion, Student Success Programs complied, in all material respects, with the compliance requirements referred to above that are applicable to the statutory requirements listed in the schedule above for the year ended June 30, 2021.

### Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of compliance and the results of that testing. This report is an integral part of an audit performed in accordance with *2020-21 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, prescribed in Title 5, *California Code of Regulations*, Section 19810. Accordingly, this report is not suitable for any other purpose.

*Wilkinson Hadley King & Co LLP*

El Cajon, California  
January 31, 2022

## Auditor's Results, Findings & Recommendations

**STUDENT SUCCESS PROGRAMS**

Schedule of Auditor's Results  
Year Ended June 30, 2021

**FINANCIAL STATEMENTS**

Type of auditor's report issued: Unmodified

Internal control over financial reporting:

One or more material weakness(es) identified?        Yes   X   No

One or more significant deficiencies identified that are not considered material weakness(es)?        Yes   X   No

Noncompliance material to financial statements noted?        Yes   X   No

**FEDERAL AWARDS**

Internal control over major programs:

One or more material weakness(es) identified?        Yes   X   No

One or more significant deficiencies identified that are not considered material weakness(es)?        Yes   X   No

Type of auditor's report issued on compliance for major programs: Unmodified

Compliance supplement utilized for single audit July 2021 with  
December 2021 Addendum

Any audit findings disclosed that are required to be reported in accordance with 2 CFR §200.516?        Yes   X   No

Identification of major programs:

<u>CFDA Number(s)</u>	<u>Name of Federal Program or Cluster</u>
84.425D	CARES Act - Elementary & Secondary School Emergency Relief
84.425D	CARES Act - Elementary & Secondary School Emergency Relief II
84.425D	CARES Act - Elementary & Secondary School Emergency Relief III

Dollar threshold used to distinguish between Type A and Type B programs \$750,000

Auditee qualified as low-risk auditee?   X   Yes        No

**STATE AWARDS**

Any audit findings disclosed that are required to be reported in accordance with *2020-21 Guide for Annual Audits of California K-12 Local Education Agencies*?        Yes   X   No

Type of auditor's report issued on compliance for state programs: Unmodified

**STUDENT SUCCESS PROGRAMS**  
 Schedule of Findings and Questioned Costs  
 Year Ended June 30, 2021

Findings represent significant deficiencies, material weaknesses, and/or instances of noncompliance related to the financial statements that are required to be reported in accordance with *Government Auditing Standards*, Title 2 U.S. Code of Federal Regulations Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance), or the *2020-21 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*. Finding codes as identified in the *2020-21 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting* are as follows:

Five Digit Code	AB 3627 Finding Type
10000	Attendance
20000	Inventory of Equipment
30000	Internal Control
40000	State Compliance
42000	Charter School Facilities
43000	Apprenticeship: Related and Supplemental Instruction
50000	Federal Compliance
60000	Miscellaneous
61000	Classroom Teacher Salaries
62000	Local Control Accountability Plan
70000	Instructional Materials
71000	Teacher Misassignments
72000	School Accountability Report Card

**A. Financial Statement Findings**

None

**B. Federal Award Findings**

None

**C. State Award Findings**

None

**STUDENT SUCCESS PROGRAMS**

Schedule of Prior Year Audit Findings

Year Ended June 30, 2021

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<u>Finding/Recommendation</u>	<u>Status</u>	<u>Explanation if Not Implemented</u>
There were no findings in the prior year audit.	N/A	N/A



**Participation Report: All Students  
Month 12: 05/03/2021 - 05/28/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	<b>850</b>	<b>751</b>	<b>78.3%</b>	<b>83.1%</b>	<b>90.8%</b>	<b>90.5%</b>
<b>Totals May 2020</b>	<b>760</b>	<b>648</b>	<b>70.9%</b>	<b>85.7%</b>	<b>85.3%</b>	<b>89.9%</b>
<b>Variance:</b>	<b>90</b>	<b>103</b>	<b>7.4%</b>	<b>-2.6%</b>	<b>5.5%</b>	<b>0.6%</b>

*\*Total Served does not include NPS/SWD Follow-Up students*

All Students									
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
SD	KM	KM1		40	27	53.9%	60.7%	84.0%	84.4%
SD	KM	KM2		40	24	50.0%	55.1%	83.3%	84.3%
SD	KM	KM3		40	30	63.1%	67.3%	90.0%	88.5%
SD	LJ	LJ1		40	31	67.3%	72.5%	90.0%	88.2%
SD	LJ	LJ2		40	32	66.6%	77.8%	87.8%	91.5%
RV	MR	MR1		40	40	93.6%	94.6%	93.6%	92.0%
RV	MR	MR2		40	38	82.9%	89.7%	90.3%	90.0%
RV	MR	MR3		40	40	88.4%	90.8%	90.1%	88.9%
RV	MR	MR4		40	40	93.5%	88.8%	93.5%	89.1%
RV	MR	MR5		40	39	85.3%	90.8%	87.4%	89.2%
RV	MR	MR6		20	20	75.0%	77.4%	84.5%	88.2%
RV	MR	MR7		40	38	81.5%	78.6%	86.8%	80.3%
SD	MV	MV1		40	27	51.4%	61.9%	82.4%	86.1%
SD	MV	MV2		40	31	68.3%	72.6%	88.1%	87.1%
SD	MV	MV3		40	35	68.5%	68.6%	80.6%	79.3%
SD	PB	PB1		40	20	44.9%	49.8%	95.5%	94.9%
SD	PB	PB2		40	33	73.9%	83.2%	89.5%	93.5%
SD	PB	PB3		40	26	60.9%	53.8%	93.7%	92.9%
SD	TSK5	TSK5-1		25	30	114.2%	112.3%	98.3%	99.4%
SD	TSK5	TSK5-2		25	31	124.0%	108.9%	100.0%	98.9%
SD	TSK5	TSK5-3		25	32	114.8%	116.3%	94.9%	97.6%
SD	TSK5	TSK5-4		25	31	119.2%	109.2%	96.1%	95.0%
SD	TSK5	TSK5-5		25	27	108.0%	110.3%	100.0%	99.4%
SD	TSK5	TSK5-6		25	29	110.6%	114.8%	97.9%	98.5%



**Participation Report: All Students  
Month 13: 05/31/2021 - 06/25/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	<b>890</b>	<b>775</b>	<b>71.4%</b>	<b>88.3%</b>	<b>91.2%</b>	<b>90.5%</b>
<b>Totals June 2020</b>	<b>800</b>	<b>730</b>	<b>70.9%</b>	<b>88.1%</b>	<b>88.1%</b>	<b>89.8%</b>
<b>Variance:</b>	<b>90</b>	<b>45</b>	<b>0.5%</b>	<b>0.2%</b>	<b>3.1%</b>	<b>0.7%</b>

*\*Total Served does not include NPS/SWD Follow-Up students*

All Students									
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
SD	KM	KM1		40	24	47.9%	59.6%	85.4%	84.4%
SD	KM	KM2		40	19	40.8%	53.9%	92.0%	84.8%
SD	KM	KM3		40	26	51.4%	65.9%	89.9%	88.6%
SD	LJ	LJ1		40	30	53.8%	70.9%	86.3%	88.1%
SD	LJ	LJ2		40	33	67.2%	76.9%	92.4%	91.6%
SD	LJ	LJ3		20	30	62.4%	62.4%	91.9%	91.9%
RV	MR	MR1		40	40	95.7%	94.7%	96.8%	92.4%
RV	MR	MR2		40	35	74.3%	88.4%	88.0%	89.8%
RV	MR	MR3		40	39	91.6%	90.9%	93.9%	89.3%
RV	MR	MR4		40	40	90.1%	88.9%	90.1%	89.2%
RV	MR	MR5		40	36	82.2%	90.1%	91.4%	89.3%
RV	MR	MR6		20	19	75.8%	77.3%	80.2%	87.5%
RV	MR	MR7		40	36	75.8%	78.3%	84.2%	80.7%
SD	MV	MV1		40	30	52.0%	61.0%	84.0%	86.0%
SD	MV	MV2		40	32	65.8%	72.0%	87.3%	87.1%
SD	MV	MV3		40	32	60.3%	67.9%	83.0%	79.6%
SD	PB	PB1		40	31	55.4%	50.3%	95.7%	95.0%
SD	PB	PB2		40	39	78.4%	82.8%	89.5%	93.1%
SD	PB	PB3		40	25	53.0%	53.8%	92.0%	92.9%
SD	PB	PB4		20	19	47.4%	47.4%	98.4%	98.4%
SD	TSK5	TSK5-1		25	28	104.0%	111.6%	95.6%	99.1%
SD	TSK5	TSK5-2		25	29	112.0%	109.1%	96.6%	98.7%
SD	TSK5	TSK5-3		25	26	91.6%	113.9%	97.1%	97.6%
SD	TSK5	TSK5-4		25	26	86.1%	106.9%	97.8%	95.3%
SD	TSK5	TSK5-5		25	23	74.9%	106.8%	100.0%	99.5%
SD	TSK5	TSK5-6		25	28	108.2%	114.2%	96.6%	98.3%



**Participation Report: All Students  
Month 1: 07/01/2021 - 07/23/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	590	523	80.5%	80.5%	94.1%	94.1%
<b>Totals July 2020</b>	880	879	85.0%	85.0%	89.6%	89.6%
<b>Variance:</b>	-290	-356	-4.5%	-4.5%	4.5%	4.5%

*\*Total Served does not include NPS/SWD Follow-Up students*

All Students									
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
SD	KM	KM1		40	35	72.0%	72.0%	84.7%	84.7%
SD	KM	KM3		40	39	79.2%	79.2%	86.5%	86.5%
SD	LJ	LJ1		40	38	81.7%	81.7%	88.0%	88.0%
SD	LJ	LJ2		40	40	82.5%	82.5%	89.0%	89.0%
SD	MV	MV1		40	34	81.1%	81.1%	95.9%	95.9%
SD	MV	MV2		40	40	90.0%	90.0%	92.0%	92.0%
SD	MV	MV3		40	37	82.3%	82.3%	92.6%	92.6%
SD	PB	PB1		40	41	95.0%	95.0%	98.4%	98.4%
SD	PB	PB2		40	37	89.2%	89.2%	96.5%	96.5%
SD	PB	PB3		40	40	91.3%	91.3%	98.0%	98.0%
SD	PB	PB4		40	40	97.2%	97.2%	100.0%	100.0%
SD	TSK5	TSK5-1		25	25	100.0%	100.0%	100.0%	100.0%
SD	TSK5	TSK5-2		25	13	50.5%	50.5%	100.0%	100.0%
SD	TSK5	TSK5-3		25	21	80.8%	80.8%	96.1%	96.1%
SD	TSK5	TSK5-4		25	12	43.5%	43.5%	100.0%	100.0%
SD	TSK5	TSK5-5		25	16	58.8%	58.8%	95.5%	95.5%
SD	TSK5	TSK5-6		25	15	60.0%	60.0%	100.0%	100.0%



**Participation Report: All Students  
Month 2: 07/26/2021 - 08/20/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	550	472	65.0%	73.9%	93.4%	93.7%
<b>Totals July/August 2020</b>	880	858	77.4%	80.9%	90.7%	90.2%
<b>Variance:</b>	-330	-386	-12.4%	-7.0%	2.7%	3.5%

*\*Total Served does not include NPS/SWD Follow-Up students*

All Students									
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
SD	KM	KM1		40	34	63.4%	67.2%	86.1%	85.4%
SD	KM	KM3		40	36	60.9%	69.0%	87.6%	87.0%
SD	LJ	LJ1		40	32	50.3%	64.2%	91.4%	89.5%
SD	LJ	LJ2		40	36	61.6%	70.9%	90.8%	89.9%
SD	MV	MV1		40	28	48.1%	48.1%	88.5%	88.5%
SD	MV	MV2		40	40	84.5%	86.9%	90.1%	91.0%
SD	MV	MV3		40	32	60.1%	70.0%	93.2%	92.9%
SD	PB	PB1		40	48	74.8%	83.8%	96.0%	97.2%
SD	PB	PB2		40	43	84.3%	86.5%	96.4%	96.4%
SD	PB	PB3		40	42	68.4%	78.5%	99.3%	98.6%
SD	TSK5	TSK5-1		25	25	94.0%	96.7%	94.8%	97.1%
SD	TSK5	TSK5-2		25	14	55.0%	53.0%	100.0%	100.0%
SD	TSK5	TSK5-3		25	20	70.2%	74.9%	92.6%	94.3%
SD	TSK5	TSK5-4		25	13	50.4%	47.3%	100.0%	100.0%
SD	TSK5	TSK5-5		25	12	45.8%	51.6%	100.0%	97.7%
SD	TSK5	TSK5-6		25	17	64.6%	62.6%	100.0%	100.0%



**Participation Report: All Students  
Month 3: 08/23/2021 - 09/17/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	550	313	47.5%	66.7%	94.4%	93.9%
<b>Totals August/September 2020</b>	850	731	71.7%	88.2%	91.1%	90.4%
<b>Variance:</b>	-300	-418	-24.2%	-21.5%	3.3%	3.5%

*\*Total Served does not include NPS/SWD Follow-Up students*

All Students									
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
SD	KM	KM1		40	29	55.8%	63.4%	85.2%	85.4%
SD	KM	KM3		40	27	52.4%	63.5%	88.5%	87.4%
SD	LJ	LJ1		40	16	24.3%	24.3%	92.6%	92.6%
SD	LJ	LJ2		40	17	35.8%	59.2%	94.5%	90.8%
SD	MV	MV1		40	12	23.8%	49.8%	91.4%	92.4%
SD	MV	MV2		40	28	59.9%	77.9%	91.5%	91.1%
SD	MV	MV3		40	21	42.2%	60.7%	92.4%	92.8%
SD	PB	PB1		40	13	29.3%	65.6%	92.1%	96.4%
SD	PB	PB2		40	24	44.0%	72.3%	96.9%	96.5%
SD	PB	PB3		40	12	21.9%	59.7%	100.0%	98.8%
SD	TSK5	TSK5-1		25	21	75.1%	89.5%	100.0%	97.9%
SD	TSK5	TSK5-2		25	17	68.0%	58.0%	100.0%	100.0%
SD	TSK5	TSK5-3		25	21	74.0%	74.6%	94.3%	94.3%
SD	TSK5	TSK5-4		25	18	62.0%	52.2%	100.0%	100.0%
SD	TSK5	TSK5-5		25	17	65.8%	56.3%	100.0%	98.6%
SD	TSK5	TSK5-6		25	20	76.4%	67.2%	100.0%	100.0%



**Participation Report: All Students  
Month 4: 09/20/2021 - 10/15/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	510	338	59.7%	64.9%	94.7%	94.1%
<b>Totals September/October 2020</b>	850	765	81.0%	89.0%	92.2%	90.9%
<b>Variance:</b>	-340	-427	-21.3%	-24.1%	2.5%	3.2%

*\*Total Served does not include NPS/SWD Follow-Up students*

All Students									
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
SD	KM	KM1		40	28	60.3%	62.6%	86.1%	85.5%
SD	KM	KM3		40	27	58.1%	62.0%	88.4%	87.7%
SD	LJ	LJ1		40	14	31.3%	28.0%	92.9%	92.8%
SD	LJ	LJ2		40	16	37.3%	53.3%	93.1%	91.2%
SD	MV	MV2		40	38	86.1%	80.1%	91.5%	91.2%
SD	MV	MV3		40	24	54.6%	59.1%	91.0%	92.3%
SD	PB	PB1		40	14	30.9%	56.2%	98.4%	96.7%
SD	PB	PB2		40	19	42.8%	64.3%	97.2%	96.6%
SD	PB	PB3		40	14	30.6%	51.8%	91.8%	97.6%
SD	TSK5	TSK5-1		25	22	86.2%	88.6%	100.0%	98.4%
SD	TSK5	TSK5-2		25	24	87.8%	66.1%	100.0%	100.0%
SD	TSK5	TSK5-3		25	26	97.0%	80.6%	96.6%	95.0%
SD	TSK5	TSK5-4		25	26	86.4%	61.5%	100.0%	100.0%
SD	TSK5	TSK5-5		25	23	79.4%	62.5%	100.0%	99.1%
SD	TSK5	TSK5-6		25	23	90.0%	73.4%	100.0%	100.0%



**Participation Report: All Students  
Month 5: 10/18/2021 - 11/12/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	510	353	63.3%	64.5%	93.8%	94.0%
<b>Totals October/November 2020</b>	850	777	81.7%	87.3%	90.8%	90.9%
<b>Variance:</b>	-340	-424	-18.4%	-22.8%	3.0%	3.1%

*\*Total Served does not include NPS/SWD Follow-Up students*

All Students									
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
SD	KM	KM1		40	28	59.6%	62.0%	85.2%	85.5%
SD	KM	KM3		40	29	63.3%	62.3%	88.7%	87.9%
SD	LJ	LJ1		40	15	30.9%	28.9%	86.7%	90.5%
SD	LJ	LJ2		40	17	37.8%	50.1%	88.9%	90.8%
SD	MV	MV2		40	38	89.9%	82.1%	95.1%	92.1%
SD	MV	MV3		40	25	57.8%	58.8%	92.8%	92.4%
SD	PB	PB1		40	21	43.2%	53.5%	97.6%	96.8%
SD	PB	PB2		40	19	44.9%	60.3%	95.8%	96.5%
SD	PB	PB3		40	15	31.7%	47.7%	85.8%	95.8%
SD	TSK5	TSK5-1		25	23	88.8%	88.6%	100.0%	98.8%
SD	TSK5	TSK5-2		25	22	77.1%	68.3%	90.6%	97.7%
SD	TSK5	TSK5-3		25	25	97.7%	84.1%	97.7%	95.6%
SD	TSK5	TSK5-4		25	26	100.6%	69.5%	98.0%	99.4%
SD	TSK5	TSK5-5		25	24	91.8%	68.5%	100.0%	99.3%
SD	TSK5	TSK5-6		25	26	101.9%	79.2%	100.0%	100.0%



**Participation Report: All Students  
Month 6: 11/15/2021 - 12/10/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	510	365	64.2%	64.6%	92.3%	93.8%
<b>Totals November/December 2020</b>	850	767	81.0%	86.4%	90.4%	90.8%
<b>Variance:</b>	-340	-402	-16.8%	-21.8%	1.9%	3.0%

*\*Total Served does not include NPS/SWD Follow-Up students*

All Students									
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
SD	TSK5	TSK5-6		25	25	99.2%	82.0%	100.0%	100.0%
SD	TSK5	TSK5-4		25	21	84.0%	71.5%	100.0%	99.5%
SD	TSK5	TSK5-5		25	25	92.5%	71.9%	100.0%	99.4%
SD	TSK5	TSK5-1		25	23	86.7%	88.4%	94.2%	98.1%
SD	TSK5	TSK5-2		25	18	68.0%	68.3%	94.4%	97.2%
SD	PB	PB1		40	21	49.2%	52.9%	95.2%	96.6%
SD	PB	PB2		40	22	45.8%	58.3%	89.9%	95.7%
SD	PB	PB3		40	16	34.3%	45.9%	89.2%	95.1%
SD	TSK5	TSK5-3		25	26	97.9%	86.0%	96.6%	95.8%
SD	MV	MV3		40	25	52.5%	57.9%	84.0%	91.3%
SD	MV	MV2		40	40	88.7%	83.0%	89.4%	91.7%
SD	LJ	LJ2		40	20	40.8%	48.8%	89.1%	90.6%
SD	LJ	LJ1		40	22	46.7%	32.6%	89.2%	90.1%
SD	KM	KM3		40	31	67.5%	63.0%	91.0%	88.3%
SD	KM	KM1		40	30	62.7%	62.1%	85.1%	85.4%

**Participation Report: All Students**  
**Month 12: 05/03/2021 - 05/28/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	<b>2,000</b>	<b>1,878</b>	<b>80.0%</b>	<b>83.3%</b>	<b>87.4%</b>	<b>86.7%</b>
<b>Totals May 2020</b>	<b>1,920</b>	<b>1,786</b>	<b>76.4%</b>	<b>86.1%</b>	<b>82.8%</b>	<b>87.7%</b>
<b>Variance:</b>	<b>80</b>	<b>92</b>	<b>3.6%</b>	<b>-2.8%</b>	<b>4.7%</b>	<b>-1.0%</b>

\*Total Served does not include NPS/SWD Follow-Up students

<b>All Students</b>										
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE	
C	DT	DT1		40	40	92.5%	88.4%	92.5%	91.8%	
C	DT	DT2		40	36	83.4%	84.0%	95.7%	87.2%	
C	EU	EU1		40	43	92.0%	90.5%	86.2%	86.5%	
C	EU	EU2		40	40	86.3%	76.2%	86.3%	85.1%	
C	EU	EU3		40	39	82.6%	83.0%	86.4%	84.9%	
C	NG	NG1		40	36	78.6%	82.2%	90.0%	86.0%	
C	NG	NG2		40	37	84.6%	86.8%	91.5%	94.0%	
C	NG	NG3		40	39	81.1%	83.7%	84.3%	85.1%	
C	NG	NG4		40	38	84.4%	83.0%	92.8%	86.9%	
C	WM	WM1		40	37	79.4%	75.6%	86.0%	86.2%	
C	WM	WM2		40	35	76.3%	79.0%	88.4%	85.6%	
C	WM	WM3		40	37	77.4%	79.7%	85.7%	86.4%	
C	WM	WM4		40	37	80.0%	78.7%	88.9%	86.5%	
C	WM	WM5		40	32	62.4%	75.4%	84.3%	84.9%	
<b>Central Totals:</b>				<b>14</b>	<b>560</b>	<b>526</b>	<b>81.5%</b>	<b>84.2%</b>	<b>88.5%</b>	<b>86.9%</b>

**Participation Report: All Students**  
**Month 12: 05/03/2021 - 05/28/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	<b>2,000</b>	<b>1,878</b>	<b>80.0%</b>	<b>83.3%</b>	<b>87.4%</b>	<b>86.7%</b>
<b>Totals May 2020</b>	<b>1,920</b>	<b>1,786</b>	<b>76.4%</b>	<b>86.1%</b>	<b>82.8%</b>	<b>87.7%</b>
<b>Variance:</b>	<b>80</b>	<b>92</b>	<b>3.6%</b>	<b>-2.8%</b>	<b>4.7%</b>	<b>-1.0%</b>

\*Total Served does not include NPS/SWD Follow-Up students

<b>All Students</b>										
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE	
E	CL	CL1		40	39	81.8%	85.9%	85.6%	84.7%	
E	CL	CL2		40	39	83.4%	89.3%	91.0%	93.5%	
E	CL	CL3		40	6	14.0%	8.9%	93.3%	94.7%	
E	CL	CL4		40	39	78.3%	80.6%	81.6%	85.0%	
E	LKM	LKM1		40	40	90.5%	85.9%	90.6%	90.9%	
E	LKM	LKM2		40	39	80.3%	85.2%	89.2%	86.6%	
E	LKM	LKM3		40	39	83.4%	74.6%	86.1%	82.6%	
E	LKM	LKM4		40	41	88.0%	75.7%	85.9%	86.9%	
E	LKM	LKM5		40	39	80.3%	82.1%	85.5%	83.8%	
E	MM	MM1		40	36	75.3%	66.2%	85.6%	86.8%	
E	MM	MM2		40	35	75.4%	72.6%	90.7%	88.0%	
E	MM	MM3		40	37	81.0%	86.8%	94.2%	91.6%	
E	MM	MM4		40	38	74.5%	71.3%	84.7%	84.5%	
E	SR	SR1		40	36	75.0%	82.9%	85.7%	87.5%	
E	SR	SR2		40	32	63.8%	74.1%	84.2%	85.0%	
E	SR	SR3		40	37	77.9%	78.4%	87.3%	84.7%	
E	SR	SR4		40	35	74.0%	71.0%	84.6%	89.5%	
E	TS	TS1		40	37	78.8%	79.2%	85.1%	84.8%	
E	TS	TS2		40	41	85.9%	79.5%	85.0%	85.1%	
E	TS	TS3		40	39	82.8%	75.3%	92.3%	90.3%	
<b>East Totals:</b>				<b>20</b>	<b>800</b>	<b>724</b>	<b>76.2%</b>	<b>81.6%</b>	<b>87.1%</b>	<b>87.2%</b>

**Participation Report: All Students**  
**Month 12: 05/03/2021 - 05/28/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	<b>2,000</b>	<b>1,878</b>	<b>80.0%</b>	<b>83.3%</b>	<b>87.4%</b>	<b>86.7%</b>
<b>Totals May 2020</b>	<b>1,920</b>	<b>1,786</b>	<b>76.4%</b>	<b>86.1%</b>	<b>82.8%</b>	<b>87.7%</b>
<b>Variance:</b>	<b>80</b>	<b>92</b>	<b>3.6%</b>	<b>-2.8%</b>	<b>4.7%</b>	<b>-1.0%</b>

\*Total Served does not include NPS/SWD Follow-Up students

<b>All Students</b>										
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE	
W	CO	CO1		40	39	82.1%	84.2%	84.2%	85.0%	
W	CO	CO2		40	38	85.0%	78.6%	91.9%	83.6%	
W	CO	CO3		40	37	71.8%	78.1%	80.4%	84.2%	
W	CO	CO4		40	37	76.5%	72.0%	83.6%	74.9%	
W	CO	CO5		40	37	81.6%	81.0%	90.4%	91.3%	
W	CO	CO6		40	34	70.5%	43.5%	85.1%	78.2%	
W	NP	NP1		40	40	92.1%	85.0%	92.1%	88.0%	
W	NP	NP2		40	41	89.9%	91.5%	90.0%	88.8%	
W	NP	NP3		40	43	90.9%	92.9%	89.1%	88.6%	
W	NP	NP4		40	42	87.0%	62.6%	85.4%	85.2%	
W	PC	PC1		40	40	85.0%	86.6%	85.0%	89.4%	
W	PC	PC2		40	40	83.6%	77.4%	85.2%	81.8%	
W	PC	PC3		40	41	92.4%	88.3%	91.2%	89.0%	
W	PL	PL1		40	40	86.8%	85.8%	86.8%	87.5%	
W	PL	PL2		40	40	82.1%	93.2%	84.2%	86.4%	
W	PL	PL3		40	39	80.0%	75.6%	85.6%	88.3%	
<b>West Totals:</b>				<b>16</b>	<b>640</b>	<b>628</b>	<b>83.6%</b>	<b>84.5%</b>	<b>86.9%</b>	<b>86.1%</b>

**Participation Report: All Students**  
**Month 13: 05/31/2021 - 06/25/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	2,080	2,020	76.6%	86.8%	86.9%	86.8%
<b>Totals June 2020</b>	2,120	2,096	73.7%	92.9%	82.8%	87.4%
<b>Variance:</b>	-40	-76	2.9%	-6.1%	4.2%	-0.6%

\*Total Served does not include NPS/SWD Follow-Up students

All Students									
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
C	DT	DT1		40	45	88.4%	88.4%	86.9%	91.4%
C	DT	DT2		40	36	74.2%	83.7%	87.0%	84.7%
C	EU	EU1		40	44	92.1%	90.7%	87.7%	86.6%
C	EU	EU2		40	41	88.4%	77.2%	86.3%	85.2%
C	EU	EU3		40	42	83.7%	83.0%	84.1%	84.8%
C	NG	NG1		40	38	80.1%	82.1%	87.8%	86.1%
C	NG	NG2		40	40	86.1%	86.7%	91.1%	93.8%
C	NG	NG3		40	41	84.9%	83.8%	84.8%	85.1%
C	NG	NG4		40	40	81.3%	82.8%	90.2%	87.3%
C	WM	WM1		40	36	76.2%	75.7%	84.6%	86.1%
C	WM	WM2		40	40	83.6%	79.4%	93.2%	86.2%
C	WM	WM3		40	39	78.7%	79.6%	85.3%	86.3%
C	WM	WM4		40	38	80.8%	78.9%	89.0%	86.7%
C	WM	WM5		40	35	64.2%	74.5%	84.3%	84.9%
<b>Central Totals:</b>				<b>14</b>	<b>560</b>	<b>555</b>	<b>81.6%</b>	<b>87.8%</b>	<b>87.3%</b>
									<b>86.9%</b>

**Participation Report: All Students**  
**Month 13: 05/31/2021 - 06/25/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	<b>2,080</b>	<b>2,020</b>	<b>76.6%</b>	<b>86.8%</b>	<b>86.9%</b>	<b>86.8%</b>
<b>Totals June 2020</b>	<b>2,120</b>	<b>2,096</b>	<b>73.7%</b>	<b>92.9%</b>	<b>82.8%</b>	<b>87.4%</b>
<b>Variance:</b>	<b>-40</b>	<b>-76</b>	<b>2.9%</b>	<b>-6.1%</b>	<b>4.2%</b>	<b>-0.6%</b>

\*Total Served does not include NPS/SWD Follow-Up students

<b>All Students</b>									
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
E	CL	CL1		40	39	73.6%	84.8%	82.9%	84.6%
E	CL	CL2		40	40	79.2%	88.5%	90.1%	93.2%
E	CL	CL3		40	34	45.0%	20.5%	92.2%	92.9%
E	CL	CL4		40	38	72.4%	79.9%	80.9%	84.7%
E	LKM	LKM1		40	42	87.1%	86.0%	87.3%	90.5%
E	LKM	LKM2		40	32	65.9%	83.6%	89.8%	86.8%
E	LKM	LKM3		40	38	84.1%	75.4%	89.4%	83.2%
E	LKM	LKM4		40	40	85.9%	76.6%	85.9%	86.8%
E	LKM	LKM5		40	40	79.6%	81.9%	87.2%	84.0%
E	MM	MM1		40	46	79.7%	67.3%	86.7%	86.8%
E	MM	MM2		40	38	71.7%	72.6%	91.4%	88.3%
E	MM	MM3		40	43	85.4%	86.7%	95.3%	91.9%
E	MM	MM4		40	44	82.5%	72.3%	90.2%	85.0%
E	MM	MM5		40	30	30.5%	30.5%	100.0%	100.0%
E	MM	MM6		40	17	15.3%	15.3%	100.0%	100.0%
E	SR	SR1		40	39	72.8%	82.1%	84.3%	87.2%
E	SR	SR2		40	45	72.8%	73.9%	84.9%	85.0%
E	SR	SR3		40	43	80.5%	78.6%	84.3%	84.6%
E	SR	SR4		40	41	78.0%	71.6%	86.6%	89.2%
E	TS	TS1		40	41	81.2%	79.4%	84.3%	84.8%
E	TS	TS2		40	42	79.9%	79.6%	85.4%	85.1%

**Participation Report: All Students**  
**Month 13: 05/31/2021 - 06/25/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	2,080	2,020	76.6%	86.8%	86.9%	86.8%
<b>Totals June 2020</b>	2,120	2,096	73.7%	92.9%	82.8%	87.4%
<b>Variance:</b>	-40	-76	2.9%	-6.1%	4.2%	-0.6%

\*Total Served does not include NPS/SWD Follow-Up students

All Students									
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
E	TS	TS3		40	37	78.8%	75.6%	96.5%	90.8%
<b>East Totals:</b>			<b>22</b>	<b>880</b>	<b>849</b>	<b>71.9%</b>	<b>88.1%</b>	<b>87.9%</b>	<b>87.3%</b>

**Participation Report: All Students**  
**Month 13: 05/31/2021 - 06/25/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	2,080	2,020	76.6%	86.8%	86.9%	86.8%
<b>Totals June 2020</b>	2,120	2,096	73.7%	92.9%	82.8%	87.4%
<b>Variance:</b>	-40	-76	2.9%	-6.1%	4.2%	-0.6%

\*Total Served does not include NPS/SWD Follow-Up students

All Students										
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE	
W	CO	CO1		40	32	67.5%	82.8%	84.4%	85.0%	
W	CO	CO2		40	35	70.3%	77.9%	80.3%	83.4%	
W	CO	CO3		40	35	70.9%	77.5%	84.2%	84.2%	
W	CO	CO4		40	36	65.0%	71.4%	72.2%	74.7%	
W	CO	CO5		40	36	81.3%	81.0%	90.4%	91.2%	
W	CO	CO6		40	31	57.6%	45.5%	75.9%	77.8%	
W	NP	NP1		40	42	95.4%	85.9%	93.7%	88.5%	
W	NP	NP2		40	42	96.3%	91.9%	92.8%	89.1%	
W	NP	NP3		40	38	85.7%	92.3%	90.2%	88.7%	
W	NP	NP4		40	40	79.9%	64.5%	79.9%	84.5%	
W	PC	PC1		40	40	70.7%	85.3%	82.5%	88.9%	
W	PC	PC2		40	43	87.5%	78.3%	89.3%	82.4%	
W	PC	PC3		40	44	85.3%	88.0%	86.7%	88.8%	
W	PL	PL1		40	42	86.3%	85.8%	84.8%	87.3%	
W	PL	PL2		40	37	77.8%	91.9%	89.1%	86.6%	
W	PL	PL3		40	43	81.6%	76.1%	85.4%	88.0%	
<b>West Totals:</b>				<b>16</b>	<b>640</b>	<b>616</b>	<b>78.7%</b>	<b>84.0%</b>	<b>85.4%</b>	<b>86.0%</b>

**Participation Report: All Students**  
**Month 1: 07/01/2021 - 07/23/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	<b>2,040</b>	<b>1,836</b>	<b>78.8%</b>	<b>78.8%</b>	<b>91.1%</b>	<b>91.1%</b>
<b>Totals July 2020</b>	<b>2,160</b>	<b>2,241</b>	<b>85.3%</b>	<b>85.3%</b>	<b>87.3%</b>	<b>87.3%</b>
<b>Variance:</b>	<b>-120</b>	<b>-405</b>	<b>-6.5%</b>	<b>-6.5%</b>	<b>3.8%</b>	<b>3.8%</b>

\*Total Served does not include NPS/SWD Follow-Up students

<b>All Students</b>										
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE	
C	CO	CO2		40	36	78.6%	78.6%	87.3%	87.3%	
C	CO	CO3		40	38	80.9%	80.9%	85.8%	85.8%	
C	CO	CO4		40	39	82.5%	82.5%	91.2%	91.2%	
C	CO	CO5		40	40	90.6%	90.6%	95.2%	95.2%	
C	CO	CO6		40	24	50.8%	50.8%	84.6%	84.6%	
C	EU	EU1		40	42	93.8%	93.8%	90.6%	90.6%	
C	EU	EU2		40	41	93.4%	93.4%	91.2%	91.2%	
C	EU	EU3		40	38	83.1%	83.1%	90.5%	90.5%	
C	NG	NG1		40	33	75.2%	75.2%	91.6%	91.6%	
C	NG	NG2		40	33	65.9%	65.9%	98.6%	98.6%	
C	NG	NG3		40	36	80.3%	80.3%	95.5%	95.5%	
C	NG	NG4		40	41	91.3%	91.3%	91.7%	91.7%	
C	WM	WM1		40	32	70.8%	70.8%	91.1%	91.1%	
C	WM	WM2		40	40	90.6%	90.6%	92.1%	92.1%	
C	WM	WM3		40	31	69.8%	69.8%	93.7%	93.7%	
C	WM	WM4		40	36	87.5%	87.5%	97.2%	97.2%	
C	WM	WM5		40	38	74.2%	74.2%	90.5%	90.5%	
<b>Central Totals:</b>				<b>12</b>	<b>680</b>	<b>618</b>	<b>80.0%</b>	<b>80.0%</b>	<b>91.7%</b>	<b>91.7%</b>
E	LKM	LKM1		40	37	82.2%	82.2%	90.1%	90.1%	
E	LKM	LKM2		40	34	77.8%	77.8%	96.9%	96.9%	
E	LKM	LKM3		40	35	80.9%	80.9%	94.9%	94.9%	
E	LKM	LKM4		40	24	50.5%	50.5%	89.0%	89.0%	

**Participation Report: All Students**  
**Month 1: 07/01/2021 - 07/23/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	<b>2,040</b>	<b>1,836</b>	<b>78.8%</b>	<b>78.8%</b>	<b>91.1%</b>	<b>91.1%</b>
<b>Totals July 2020</b>	<b>2,160</b>	<b>2,241</b>	<b>85.3%</b>	<b>85.3%</b>	<b>87.3%</b>	<b>87.3%</b>
<b>Variance:</b>	<b>-120</b>	<b>-405</b>	<b>-6.5%</b>	<b>-6.5%</b>	<b>3.8%</b>	<b>3.8%</b>

\*Total Served does not include NPS/SWD Follow-Up students

<b>All Students</b>									
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
E	LKM	LKM5		40	35	78.1%	78.1%	91.2%	91.2%
E	MM	MM1		40	39	83.6%	83.6%	86.9%	86.9%
E	MM	MM2		40	33	68.0%	68.0%	90.1%	90.1%
E	MM	MM3		40	38	90.2%	90.2%	97.0%	97.0%
E	MM	MM4		40	37	79.7%	79.7%	90.3%	90.3%
E	MM	MM5		40	39	97.2%	97.2%	100.0%	100.0%
E	MM	MM6		40	36	87.2%	87.2%	100.0%	100.0%
E	SR	SR1		40	35	76.1%	76.1%	87.0%	87.0%
E	SR	SR2		40	47	103.3%	103.3%	88.0%	88.0%
E	SR	SR3		40	38	83.9%	83.9%	93.4%	93.4%
E	SR	SR4		40	36	79.7%	79.7%	90.3%	90.3%
E	TS	TS1		40	39	82.3%	82.3%	87.0%	87.0%
E	TS	TS2		40	33	67.8%	67.8%	84.4%	84.4%
E	TS	TS3		40	29	62.0%	62.0%	100.0%	100.0%
<b>East Totals:</b>			<b>18</b>	<b>720</b>	<b>644</b>	<b>79.5%</b>	<b>79.5%</b>	<b>91.9%</b>	<b>91.9%</b>

**Participation Report: All Students**  
**Month 1: 07/01/2021 - 07/23/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	<b>2,040</b>	<b>1,836</b>	<b>78.8%</b>	<b>78.8%</b>	<b>91.1%</b>	<b>91.1%</b>
<b>Totals July 2020</b>	<b>2,160</b>	<b>2,241</b>	<b>85.3%</b>	<b>85.3%</b>	<b>87.3%</b>	<b>87.3%</b>
<b>Variance:</b>	<b>-120</b>	<b>-405</b>	<b>-6.5%</b>	<b>-6.5%</b>	<b>3.8%</b>	<b>3.8%</b>

\*Total Served does not include NPS/SWD Follow-Up students

<b>All Students</b>										
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE	
W	CL	CL1		40	37	80.5%	80.5%	90.2%	90.2%	
W	CL	CL2		40	31	69.1%	69.1%	94.6%	94.6%	
W	CL	CL3		40	40	97.2%	97.2%	97.2%	97.2%	
W	CL	CL4		40	31	57.7%	57.7%	82.6%	82.6%	
W	DT	DT1		40	38	79.2%	79.2%	94.9%	94.9%	
W	DT	DT2		40	36	71.9%	71.9%	86.0%	86.0%	
W	NP	NP1		40	35	76.9%	76.9%	87.9%	87.9%	
W	NP	NP2		40	40	95.3%	95.3%	97.4%	97.4%	
W	NP	NP3		40	32	69.4%	69.4%	87.7%	87.7%	
W	NP	NP4		40	36	74.5%	74.5%	84.0%	84.0%	
W	PC	PC1		40	38	76.1%	76.1%	84.3%	84.3%	
W	PC	PC2		40	32	70.6%	70.6%	96.6%	96.6%	
W	PC	PC3		40	38	88.9%	88.9%	93.6%	93.6%	
W	PL	PL1		40	38	81.1%	81.1%	86.8%	86.8%	
W	PL	PL2		40	32	62.3%	62.3%	84.7%	84.7%	
W	PL	PL3		40	40	80.2%	80.2%	84.2%	84.2%	
<b>West Totals:</b>				<b>51</b>	<b>640</b>	<b>574</b>	<b>76.9%</b>	<b>76.9%</b>	<b>89.7%</b>	<b>89.7%</b>

**Participation Report: All Students**  
**Month 2: 07/26/2021 - 08/20/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	<b>2,040</b>	<b>1,792</b>	<b>71.0%</b>	<b>76.5%</b>	<b>89.8%</b>	<b>90.4%</b>
<b>Totals July/August 2020</b>	<b>2,160</b>	<b>2,252</b>	<b>81.8%</b>	<b>83.4%</b>	<b>87.1%</b>	<b>87.2%</b>
<b>Variance:</b>	<b>-120</b>	<b>-460</b>	<b>-10.8%</b>	<b>-6.9%</b>	<b>2.7%</b>	<b>3.2%</b>

\*Total Served does not include NPS/SWD Follow-Up students

All Students										
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE	
C	CO	CO2		40	35	71.0%	74.4%	87.1%	87.2%	
C	CO	CO3		40	39	71.5%	75.7%	84.1%	84.9%	
C	CO	CO4		40	33	66.4%	73.5%	86.6%	88.8%	
C	CO	CO5		40	40	93.8%	92.4%	94.9%	95.1%	
C	CO	CO6		40	25	48.1%	49.3%	80.2%	82.2%	
C	EU	EU1		40	42	83.1%	87.8%	86.0%	88.2%	
C	EU	EU2		40	40	85.4%	89.0%	86.5%	88.6%	
C	EU	EU3		40	40	81.0%	81.9%	87.8%	89.0%	
C	NG	NG1		40	31	63.8%	68.8%	87.9%	89.7%	
C	NG	NG2		40	37	83.1%	75.5%	94.3%	95.9%	
C	NG	NG3		40	34	66.9%	72.8%	88.4%	91.8%	
C	NG	NG4		40	39	82.1%	86.2%	89.6%	90.6%	
C	WM	WM1		40	35	68.0%	69.2%	87.0%	88.9%	
C	WM	WM2		40	38	84.0%	86.9%	93.1%	92.6%	
C	WM	WM3		40	32	68.0%	68.8%	90.8%	92.1%	
C	WM	WM4		40	37	84.6%	85.9%	94.7%	95.8%	
C	WM	WM5		40	33	64.6%	68.9%	89.6%	90.0%	
<b>Central Totals:</b>				<b>17</b>	<b>680</b>	<b>610</b>	<b>74.4%</b>	<b>76.9%</b>	<b>89.0%</b>	<b>90.2%</b>

**Participation Report: All Students  
Month 2: 07/26/2021 - 08/20/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	<b>2,040</b>	<b>1,792</b>	<b>71.0%</b>	<b>76.5%</b>	<b>89.8%</b>	<b>90.4%</b>
<b>Totals July/August 2020</b>	<b>2,160</b>	<b>2,252</b>	<b>81.8%</b>	<b>83.4%</b>	<b>87.1%</b>	<b>87.2%</b>
<b>Variance:</b>	<b>-120</b>	<b>-460</b>	<b>-10.8%</b>	<b>-6.9%</b>	<b>2.7%</b>	<b>3.2%</b>

\*Total Served does not include NPS/SWD Follow-Up students

<b>All Students</b>										
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE	
E	LKM	LKM1		40	35	70.4%	75.6%	89.5%	89.8%	
E	LKM	LKM2		40	36	64.1%	70.2%	96.2%	96.6%	
E	LKM	LKM3		40	35	74.3%	77.2%	96.7%	95.9%	
E	LKM	LKM4		40	30	59.4%	55.4%	88.1%	88.5%	
E	LKM	LKM5		40	34	67.4%	72.2%	89.2%	90.2%	
E	MM	MM1		40	37	69.9%	69.9%	85.9%	85.9%	
E	MM	MM2		40	32	62.9%	65.1%	91.0%	90.5%	
E	MM	MM3		40	36	74.1%	81.3%	96.4%	96.7%	
E	MM	MM4		40	36	72.9%	75.9%	90.7%	90.5%	
E	MM	MM5		40	34	76.5%	85.7%	100.0%	100.0%	
E	MM	MM6		40	35	69.0%	77.1%	100.0%	100.0%	
E	SR	SR1		40	38	73.1%	74.4%	83.5%	85.0%	
E	SR	SR2		40	46	75.5%	75.5%	80.4%	80.4%	
E	SR	SR3		40	36	69.0%	75.6%	89.6%	91.4%	
E	SR	SR4		40	34	71.8%	75.3%	89.3%	89.7%	
E	TS	TS1		40	35	69.9%	75.4%	85.5%	86.2%	
E	TS	TS2		40	33	59.4%	63.1%	86.1%	85.3%	
E	TS	TS3		40	27	58.1%	59.9%	94.9%	97.2%	
<b>East Totals:</b>				<b>18</b>	<b>720</b>	<b>629</b>	<b>68.8%</b>	<b>77.3%</b>	<b>90.4%</b>	<b>91.1%</b>

**Participation Report: All Students  
Month 2: 07/26/2021 - 08/20/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	<b>2,040</b>	<b>1,792</b>	<b>71.0%</b>	<b>76.5%</b>	<b>89.8%</b>	<b>90.4%</b>
<b>Totals July/August 2020</b>	<b>2,160</b>	<b>2,252</b>	<b>81.8%</b>	<b>83.4%</b>	<b>87.1%</b>	<b>87.2%</b>
<b>Variance:</b>	<b>-120</b>	<b>-460</b>	<b>-10.8%</b>	<b>-6.9%</b>	<b>2.7%</b>	<b>3.2%</b>

\*Total Served does not include NPS/SWD Follow-Up students

<b>All Students</b>										
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE	
W	CL	CL1		40	38	72.9%	76.3%	85.0%	87.4%	
W	CL	CL2		40	28	60.6%	64.4%	94.4%	94.5%	
W	CL	CL3		40	27	42.0%	66.5%	100.0%	98.2%	
W	CL	CL4		40	28	52.5%	54.8%	84.0%	83.3%	
W	DT	DT1		40	37	84.4%	82.1%	94.4%	94.6%	
W	DT	DT2		40	34	64.6%	64.6%	84.3%	84.3%	
W	NP	NP1		40	34	68.8%	72.4%	86.1%	86.9%	
W	NP	NP2		40	40	85.5%	89.9%	95.8%	96.6%	
W	NP	NP3		40	40	79.8%	75.1%	90.0%	89.1%	
W	NP	NP4		40	38	72.0%	77.2%	85.5%	86.1%	
W	PC	PC1		40	35	84.4%	80.7%	98.5%	92.0%	
W	PC	PC2		40	34	69.3%	69.9%	90.7%	93.2%	
W	PC	PC3		40	38	79.9%	83.9%	95.1%	94.4%	
W	PL	PL1		40	33	66.1%	72.8%	85.9%	86.3%	
W	PL	PL2		40	33	65.8%	64.2%	85.8%	85.3%	
W	PL	PL3		40	36	67.4%	73.1%	87.2%	85.7%	
<b>West Totals:</b>				<b>16</b>	<b>640</b>	<b>553</b>	<b>69.7%</b>	<b>75.0%</b>	<b>90.0%</b>	<b>89.9%</b>

**Participation Report: All Students**  
**Month 3: 08/23/2021 - 09/17/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	<b>1,800</b>	<b>1,440</b>	<b>64.5%</b>	<b>72.9%</b>	<b>88.9%</b>	<b>90.0%</b>
<b>Totals August/September 2020</b>	<b>1,880</b>	<b>1,706</b>	<b>72.5%</b>	<b>80.5%</b>	<b>85.2%</b>	<b>86.7%</b>
<b>Variance:</b>	<b>-80</b>	<b>-266</b>	<b>-8.0%</b>	<b>-7.6%</b>	<b>3.7%</b>	<b>3.3%</b>

\*Total Served does not include NPS/SWD Follow-Up students

<b>All Students</b>										
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE	
C	CO	CO2		40	40	86.7%	78.5%	89.5%	88.1%	
C	CO	CO3		40	40	81.3%	77.5%	85.2%	85.0%	
C	CO	CO4		40	43	93.6%	80.2%	91.8%	90.0%	
C	CO	CO5		40	39	88.3%	91.0%	93.5%	94.6%	
C	EU	EU1		40	33	68.1%	81.3%	87.3%	87.9%	
C	EU	EU2		40	38	81.5%	86.5%	91.3%	89.4%	
C	EU	EU3		40	40	80.8%	84.9%	85.1%	90.1%	
C	NG	NG1		40	30	57.8%	65.1%	87.4%	89.0%	
C	NG	NG2		40	26	60.7%	70.6%	98.9%	96.8%	
C	NG	NG3		40	33	66.5%	70.7%	89.4%	91.0%	
C	NG	NG4		40	32	63.9%	78.8%	87.8%	89.8%	
C	WM	WM1		40	34	67.8%	68.8%	82.4%	86.6%	
C	WM	WM2		40	36	68.9%	68.9%	84.4%	88.0%	
C	WM	WM3		40	30	61.1%	66.3%	98.4%	94.0%	
C	WM	WM4		40	34	68.2%	80.0%	85.8%	92.8%	
<b>Central Totals:</b>				<b>15</b>	<b>600</b>	<b>528</b>	<b>73.0%</b>	<b>75.7%</b>	<b>89.0%</b>	<b>89.8%</b>

**Participation Report: All Students**  
**Month 3: 08/23/2021 - 09/17/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	<b>1,800</b>	<b>1,440</b>	<b>64.5%</b>	<b>72.9%</b>	<b>88.9%</b>	<b>90.0%</b>
<b>Totals August/September 2020</b>	<b>1,880</b>	<b>1,706</b>	<b>72.5%</b>	<b>80.5%</b>	<b>85.2%</b>	<b>86.7%</b>
<b>Variance:</b>	<b>-80</b>	<b>-266</b>	<b>-8.0%</b>	<b>-7.6%</b>	<b>3.7%</b>	<b>3.3%</b>

\*Total Served does not include NPS/SWD Follow-Up students

<b>All Students</b>										
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE	
E	LKM	LKM1		40	31	69.7%	73.7%	93.3%	90.9%	
E	LKM	LKM2		40	26	56.1%	65.5%	98.1%	97.0%	
E	LKM	LKM3		40	33	71.5%	75.3%	96.8%	96.2%	
E	LKM	LKM4		40	29	54.7%	55.2%	87.8%	88.2%	
E	LKM	LKM5		40	29	59.9%	68.1%	84.8%	88.6%	
E	MM	MM1		40	23	39.3%	55.4%	84.7%	85.5%	
E	MM	MM2		40	30	62.6%	64.3%	92.2%	91.1%	
E	MM	MM3		40	31	67.4%	76.6%	97.6%	97.0%	
E	MM	MM4		40	28	52.6%	68.1%	87.5%	89.7%	
E	SR	SR1		40	32	61.9%	70.3%	87.5%	85.7%	
E	SR	SR2		40	21	34.4%	56.1%	82.9%	81.1%	
E	SR	SR3		40	25	51.7%	67.6%	86.3%	90.1%	
E	SR	SR4		40	26	52.8%	67.8%	88.0%	89.3%	
E	TS	TS1		40	35	67.9%	72.9%	86.1%	86.2%	
E	TS	TS2		40	29	51.9%	59.4%	85.2%	85.2%	
E	TS	TS3		40	26	52.5%	57.4%	93.8%	96.1%	
<b>East Totals:</b>				<b>16</b>	<b>640</b>	<b>454</b>	<b>56.7%</b>	<b>71.0%</b>	<b>89.8%</b>	<b>90.8%</b>

**Participation Report: All Students**  
**Month 3: 08/23/2021 - 09/17/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	<b>1,800</b>	<b>1,440</b>	<b>64.5%</b>	<b>72.9%</b>	<b>88.9%</b>	<b>90.0%</b>
<b>Totals August/September 2020</b>	<b>1,880</b>	<b>1,706</b>	<b>72.5%</b>	<b>80.5%</b>	<b>85.2%</b>	<b>86.7%</b>
<b>Variance:</b>	<b>-80</b>	<b>-266</b>	<b>-8.0%</b>	<b>-7.6%</b>	<b>3.7%</b>	<b>3.3%</b>

\*Total Served does not include NPS/SWD Follow-Up students

<b>All Students</b>									
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
W	CL	CL1		40	33	65.1%	72.5%	85.6%	86.8%
W	CL	CL2		40	31	64.4%	64.4%	96.3%	95.1%
W	CL	CL4		40	20	40.6%	50.0%	84.1%	83.5%
W	DT	DT1		40	34	65.3%	75.6%	90.0%	91.4%
W	DT	DT2		40	35	55.1%	60.1%	80.2%	82.5%
W	NP	NP1		40	28	51.4%	65.4%	85.3%	86.5%
W	NP	NP2		40	38	76.7%	85.5%	87.5%	93.7%
W	NP	NP3		40	43	90.4%	80.2%	91.6%	90.0%
W	NP	NP4		40	31	55.7%	70.0%	84.8%	85.8%
W	PC	PC2		40	39	87.1%	75.6%	92.1%	92.8%
W	PC	PC3		40	33	74.0%	80.6%	91.9%	93.6%
W	PL	PL1		40	30	57.2%	67.6%	84.9%	85.9%
W	PL	PL2		40	31	59.3%	62.6%	88.2%	86.2%
W	PL	PL3		40	32	59.7%	68.6%	84.6%	85.4%
<b>West Totals:</b>				<b>14</b>	<b>560</b>	<b>64.4%</b>	<b>71.9%</b>	<b>88.0%</b>	<b>89.3%</b>

**Participation Report: All Students**  
**Month 4: 09/20/2021 - 10/15/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	<b>1,800</b>	<b>1,450</b>	<b>69.8%</b>	<b>71.9%</b>	<b>89.6%</b>	<b>89.9%</b>
<b>Totals September/October 2020</b>	<b>1,920</b>	<b>1,733</b>	<b>76.8%</b>	<b>80.7%</b>	<b>86.7%</b>	<b>86.7%</b>
<b>Variance:</b>	<b>-120</b>	<b>-283</b>	<b>-7.0%</b>	<b>-8.8%</b>	<b>2.9%</b>	<b>3.2%</b>

\*Total Served does not include NPS/SWD Follow-Up students

<b>All Students</b>										
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE	
C	CO	CO1		40	21	37.6%	59.6%	90.7%	89.5%	
C	CO	CO2		40	36	79.6%	78.8%	88.5%	88.2%	
C	CO	CO3		40	42	84.1%	79.3%	84.4%	84.8%	
C	CO	CO4		40	38	86.4%	81.9%	91.4%	90.4%	
C	CO	CO5		40	40	97.3%	92.7%	97.3%	95.3%	
C	EU	EU1		40	37	76.0%	79.8%	91.3%	88.8%	
C	EU	EU2		40	37	81.8%	85.2%	89.1%	89.3%	
C	EU	EU3		40	39	81.9%	84.1%	84.0%	88.4%	
C	NG	NG1		40	30	61.1%	64.1%	86.2%	88.3%	
C	NG	NG2		40	29	65.0%	69.1%	99.2%	97.4%	
C	NG	NG3		40	32	67.0%	69.7%	87.0%	89.9%	
C	NG	NG4		40	32	66.3%	75.4%	84.5%	88.5%	
C	WM	WM1		40	34	67.1%	68.3%	85.0%	86.2%	
C	WM	WM2		40	36	77.5%	71.2%	87.4%	87.9%	
C	WM	WM3		40	25	53.0%	62.7%	87.1%	92.3%	
C	WM	WM4		40	36	75.3%	78.7%	87.9%	91.4%	
<b>Central Totals:</b>				<b>16</b>	<b>640</b>	<b>544</b>	<b>72.3%</b>	<b>74.8%</b>	<b>88.7%</b>	<b>89.5%</b>

**Participation Report: All Students**  
**Month 4: 09/20/2021 - 10/15/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	<b>1,800</b>	<b>1,450</b>	<b>69.8%</b>	<b>71.9%</b>	<b>89.6%</b>	<b>89.9%</b>
<b>Totals September/October 2020</b>	<b>1,920</b>	<b>1,733</b>	<b>76.8%</b>	<b>80.7%</b>	<b>86.7%</b>	<b>86.7%</b>
<b>Variance:</b>	<b>-120</b>	<b>-283</b>	<b>-7.0%</b>	<b>-8.8%</b>	<b>2.9%</b>	<b>3.2%</b>

\*Total Served does not include NPS/SWD Follow-Up students

<b>All Students</b>										
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE	
E	LKM	LKM1		40	31	74.8%	74.0%	96.5%	92.3%	
E	LKM	LKM2		40	28	64.5%	65.2%	94.9%	96.4%	
E	LKM	LKM3		40	36	80.3%	76.7%	89.2%	94.1%	
E	LKM	LKM4		40	27	57.1%	55.7%	84.8%	87.2%	
E	LKM	LKM5		40	30	62.6%	66.6%	85.9%	87.9%	
E	MM	MM1		40	25	44.8%	51.7%	84.8%	85.3%	
E	MM	MM2		40	31	73.8%	66.9%	96.1%	92.5%	
E	MM	MM3		40	32	79.4%	77.4%	99.2%	97.6%	
E	MM	MM4		40	28	58.8%	65.6%	87.9%	89.2%	
E	SR	SR1		40	37	75.6%	71.7%	84.9%	85.5%	
E	SR	SR2		40	26	54.9%	55.6%	88.5%	83.5%	
E	SR	SR3		40	32	69.5%	68.1%	87.6%	89.4%	
E	TS	TS1		40	35	78.1%	74.3%	89.4%	87.1%	
E	TS	TS2		40	28	57.4%	58.9%	85.8%	85.4%	
E	TS	TS3		40	26	59.8%	58.0%	93.2%	95.3%	
<b>East Totals:</b>				<b>15</b>	<b>600</b>	<b>452</b>	<b>66.1%</b>	<b>69.6%</b>	<b>90.0%</b>	<b>90.6%</b>

**Participation Report: All Students**  
**Month 4: 09/20/2021 - 10/15/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	<b>1,800</b>	<b>1,450</b>	<b>69.8%</b>	<b>71.9%</b>	<b>89.6%</b>	<b>89.9%</b>
<b>Totals September/October 2020</b>	<b>1,920</b>	<b>1,733</b>	<b>76.8%</b>	<b>80.7%</b>	<b>86.7%</b>	<b>86.7%</b>
<b>Variance:</b>	<b>-120</b>	<b>-283</b>	<b>-7.0%</b>	<b>-8.8%</b>	<b>2.9%</b>	<b>3.2%</b>

\*Total Served does not include NPS/SWD Follow-Up students

<b>All Students</b>										
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE	
W	CL	CL1		40	31	67.3%	71.1%	89.5%	87.5%	
W	CL	CL2		40	33	81.6%	69.1%	100.0%	96.6%	
W	CL	CL4		40	20	39.5%	47.2%	84.5%	83.8%	
W	DT	DT1		40	35	79.3%	76.6%	92.7%	91.8%	
W	DT	DT2		40	26	49.3%	56.4%	84.2%	83.0%	
W	NP	NP1		40	32	66.9%	65.8%	87.4%	86.7%	
W	NP	NP2		40	36	75.8%	82.8%	84.2%	91.1%	
W	NP	NP3		40	43	98.6%	85.2%	92.8%	90.9%	
W	NP	NP4		40	27	54.1%	65.7%	85.4%	85.7%	
W	PC	PC2		40	39	87.5%	78.8%	89.7%	91.9%	
W	PC	PC3		40	33	79.5%	80.3%	98.9%	95.0%	
W	PL	PL1		40	33	66.9%	67.4%	86.6%	86.1%	
W	PL	PL2		40	33	72.5%	65.3%	91.1%	87.6%	
W	PL	PL3		40	33	73.3%	69.9%	92.1%	87.2%	
<b>West Totals:</b>				<b>14</b>	<b>560</b>	<b>454</b>	<b>70.8%</b>	<b>71.4%</b>	<b>90.3%</b>	<b>89.6%</b>

**Participation Report: All Students**  
**Month 5: 10/18/2021 - 11/12/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	<b>1,800</b>	<b>1,536</b>	<b>73.7%</b>	<b>72.2%</b>	<b>89.2%</b>	<b>89.8%</b>
<b>Totals October/November 2020</b>	<b>1,920</b>	<b>1,767</b>	<b>78.0%</b>	<b>81.5%</b>	<b>86.5%</b>	<b>86.6%</b>
<b>Variance:</b>	<b>-120</b>	<b>-231</b>	<b>-4.3%</b>	<b>-9.3%</b>	<b>2.7%</b>	<b>3.2%</b>

\*Total Served does not include NPS/SWD Follow-Up students

<b>All Students</b>										
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE	
C	CO	CO1		40	30	61.8%	60.1%	88.2%	89.2%	
C	CO	CO2		40	38	74.3%	77.9%	84.6%	87.4%	
C	CO	CO3		40	43	86.1%	80.7%	84.4%	84.7%	
C	CO	CO4		40	38	88.9%	83.3%	96.2%	91.6%	
C	CO	CO5		40	40	96.3%	93.4%	97.6%	95.8%	
C	EU	EU1		40	41	86.6%	81.2%	88.7%	88.7%	
C	EU	EU2		40	40	83.2%	84.8%	86.1%	88.7%	
C	EU	EU3		40	41	85.5%	84.4%	83.5%	87.3%	
C	NG	NG1		40	28	61.3%	63.5%	90.1%	88.6%	
C	NG	NG2		40	31	72.4%	69.7%	97.5%	97.4%	
C	NG	NG3		40	33	68.6%	69.5%	84.4%	88.8%	
C	NG	NG4		40	32	71.8%	74.7%	93.0%	89.4%	
C	WM	WM1		40	33	70.7%	68.8%	85.6%	86.1%	
C	WM	WM2		40	34	73.6%	71.7%	86.5%	87.6%	
C	WM	WM3		40	28	59.1%	61.9%	90.2%	91.9%	
C	WM	WM4		40	36	80.0%	79.0%	88.9%	90.9%	
<b>Central Totals:</b>				<b>16</b>	<b>640</b>	<b>566</b>	<b>76.3%</b>	<b>75.1%</b>	<b>89.0%</b>	<b>89.4%</b>

**Participation Report: All Students**  
**Month 5: 10/18/2021 - 11/12/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	1,800	1,536	73.7%	72.2%	89.2%	89.8%
<b>Totals October/November 2020</b>	1,920	1,767	78.0%	81.5%	86.5%	86.6%
<b>Variance:</b>	-120	-231	-4.3%	-9.3%	2.7%	3.2%

\*Total Served does not include NPS/SWD Follow-Up students

<b>All Students</b>										
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE	
E	LKM	LKM1		40	31	72.5%	73.7%	93.5%	92.6%	
E	LKM	LKM2		40	31	71.3%	66.5%	98.7%	96.9%	
E	LKM	LKM3		40	36	78.7%	77.1%	89.3%	93.0%	
E	LKM	LKM4		40	32	64.3%	57.5%	84.2%	86.5%	
E	LKM	LKM5		40	33	67.4%	66.7%	85.5%	87.4%	
E	MM	MM1		40	31	60.1%	53.8%	84.2%	85.0%	
E	MM	MM2		40	31	69.3%	67.4%	89.5%	91.9%	
E	MM	MM3		40	32	77.0%	77.3%	96.2%	97.3%	
E	MM	MM4		40	31	65.4%	65.6%	87.2%	88.8%	
E	SR	SR1		40	35	78.6%	73.1%	89.8%	86.4%	
E	SR	SR2		40	31	65.5%	58.1%	86.3%	84.3%	
E	SR	SR3		40	32	67.5%	68.0%	86.2%	88.7%	
E	TS	TS1		40	36	76.2%	74.7%	85.4%	86.7%	
E	TS	TS2		40	31	64.6%	60.0%	85.1%	85.3%	
E	TS	TS3		40	26	59.7%	58.4%	94.2%	95.1%	
<b>East Totals:</b>				<b>15</b>	<b>600</b>	<b>479</b>	<b>69.2%</b>	<b>69.5%</b>	<b>88.9%</b>	<b>90.3%</b>

**Participation Report: All Students  
Month 5: 10/18/2021 - 11/12/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	1,800	1,536	73.7%	72.2%	89.2%	89.8%
<b>Totals October/November 2020</b>	1,920	1,767	78.0%	81.5%	86.5%	86.6%
<b>Variance:</b>	-120	-231	-4.3%	-9.3%	2.7%	3.2%

*\*Total Served does not include NPS/SWD Follow-Up students*

<b>All Students</b>									
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
W	CL	CL1		40	34	76.8%	72.3%	95.1%	89.0%
W	CL	CL2		40	34	79.9%	71.3%	94.0%	96.0%
W	CL	CL4		40	22	45.0%	46.7%	84.2%	83.8%
W	DT	DT1		40	37	87.0%	78.7%	96.1%	92.7%
W	DT	DT2		40	32	56.8%	56.5%	84.5%	83.4%
W	NP	NP1		40	35	70.0%	66.6%	85.1%	86.4%
W	NP	NP2		40	39	84.9%	83.3%	89.5%	90.8%
W	NP	NP3		40	42	96.3%	87.5%	91.7%	91.0%
W	NP	NP4		40	38	72.8%	67.2%	85.6%	85.7%
W	PC	PC2		40	40	86.3%	80.3%	86.9%	90.7%
W	PC	PC3		40	36	82.5%	80.8%	94.6%	94.9%
W	PL	PL1		40	33	68.7%	67.7%	85.7%	86.0%
W	PL	PL2		40	34	73.6%	67.0%	88.0%	87.7%
W	PL	PL3		40	35	77.0%	71.3%	92.6%	88.3%
<b>West Totals:</b>				<b>14</b>	<b>560</b>	<b>75.5%</b>	<b>72.2%</b>	<b>89.8%</b>	<b>89.6%</b>

**Participation Report: All Students**  
**Month 6: 11/15/2021 - 12/10/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	<b>1,840</b>	<b>1,569</b>	<b>74.2%</b>	<b>73.4%</b>	<b>89.3%</b>	<b>89.7%</b>
<b>Totals November/December 2020</b>	<b>1,960</b>	<b>1,794</b>	<b>77.6%</b>	<b>82.4%</b>	<b>85.7%</b>	<b>86.5%</b>
<b>Variance:</b>	<b>-120</b>	<b>-225</b>	<b>-3.4%</b>	<b>-9.0%</b>	<b>3.6%</b>	<b>3.2%</b>

\*Total Served does not include NPS/SWD Follow-Up students

<b>All Students</b>										
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE	
C	CO	CO1		40	33	65.0%	60.8%	84.6%	88.5%	
C	CO	CO2		40	36	73.5%	77.3%	85.5%	87.2%	
C	CO	CO3		40	40	85.7%	81.4%	86.0%	84.9%	
C	CO	CO4		40	37	80.0%	82.9%	86.5%	90.9%	
C	CO	CO5		40	39	90.8%	93.1%	93.2%	95.4%	
C	EU	EU1		40	41	86.5%	81.9%	85.6%	88.3%	
C	EU	EU2		40	39	81.3%	84.3%	85.0%	88.2%	
C	EU	EU3		40	42	92.5%	85.5%	88.1%	87.5%	
C	NG	NG1		40	34	67.7%	64.1%	88.1%	88.5%	
C	NG	NG2		40	32	75.5%	70.5%	97.8%	97.5%	
C	NG	NG3		40	35	72.0%	69.8%	85.4%	88.3%	
C	NG	NG4		40	33	74.3%	74.6%	92.0%	89.7%	
C	WM	WM1		40	37	76.8%	69.9%	86.0%	86.1%	
C	WM	WM2		40	37	77.0%	72.4%	85.2%	87.2%	
C	WM	WM3		40	31	66.8%	62.6%	88.9%	91.4%	
C	WM	WM4		40	34	75.8%	78.5%	91.0%	90.9%	
<b>Central Totals:</b>				<b>16</b>	<b>640</b>	<b>580</b>	<b>77.6%</b>	<b>75.4%</b>	<b>87.9%</b>	<b>89.2%</b>

**Participation Report: All Students**  
**Month 6: 11/15/2021 - 12/10/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	<b>1,840</b>	<b>1,569</b>	<b>74.2%</b>	<b>73.4%</b>	<b>89.3%</b>	<b>89.7%</b>
<b>Totals November/December 2020</b>	<b>1,960</b>	<b>1,794</b>	<b>77.6%</b>	<b>82.4%</b>	<b>85.7%</b>	<b>86.5%</b>
<b>Variance:</b>	<b>-120</b>	<b>-225</b>	<b>-3.4%</b>	<b>-9.0%</b>	<b>3.6%</b>	<b>3.2%</b>

\*Total Served does not include NPS/SWD Follow-Up students

<b>All Students</b>										
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE	
E	LKM	LKM1		40	33	72.5%	73.5%	92.2%	92.5%	
E	LKM	LKM2		40	32	74.8%	67.6%	94.9%	96.6%	
E	LKM	LKM3		40	33	73.7%	76.6%	91.5%	92.8%	
E	LKM	LKM4		40	32	68.0%	58.9%	85.0%	86.3%	
E	LKM	LKM5		40	33	73.2%	67.6%	93.6%	88.3%	
E	MM	MM1		40	32	66.5%	55.9%	84.2%	84.8%	
E	MM	MM2		40	31	73.8%	68.3%	95.3%	92.4%	
E	MM	MM3		40	31	76.0%	77.1%	98.1%	97.4%	
E	MM	MM4		40	31	67.5%	65.8%	87.1%	88.6%	
E	SR	SR1		40	35	75.3%	73.4%	86.1%	86.3%	
E	SR	SR2		40	35	72.7%	60.5%	88.3%	85.0%	
E	SR	SR3		40	32	69.0%	68.1%	86.3%	88.4%	
E	TS	TS1		40	35	75.8%	74.9%	86.7%	86.7%	
E	TS	TS2		40	29	62.2%	60.3%	85.7%	85.4%	
E	TS	TS3		40	29	67.5%	59.7%	93.1%	94.7%	
E	VT	VT1		40	4	2.2%	58.6%	100.0%	94.7%	
<b>East Totals:</b>				<b>16</b>	<b>640</b>	<b>487</b>	<b>66.9%</b>	<b>71.5%</b>	<b>89.8%</b>	<b>90.2%</b>

**Participation Report: All Students**  
**Month 6: 11/15/2021 - 12/10/2021**

POC: Participation on Capacity

POE: Participation on Enrollment

	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
<b>Schoolwide Totals:</b>	<b>1,840</b>	<b>1,569</b>	<b>74.2%</b>	<b>73.4%</b>	<b>89.3%</b>	<b>89.7%</b>
<b>Totals November/December 2020</b>	<b>1,960</b>	<b>1,794</b>	<b>77.6%</b>	<b>82.4%</b>	<b>85.7%</b>	<b>86.5%</b>
<b>Variance:</b>	<b>-120</b>	<b>-225</b>	<b>-3.4%</b>	<b>-9.0%</b>	<b>3.6%</b>	<b>3.2%</b>

\*Total Served does not include NPS/SWD Follow-Up students

<b>All Students</b>									
Reg	RC	IRC	Teacher	Capacity	Total Served*	POC	Cumulative POC	POE	Cumulative POE
W	CL	CL1		40	33	77.0%	72.9%	93.3%	89.6%
W	CL	CL2		40	34	81.3%	72.7%	97.4%	96.2%
W	CL	CL4		40	27	52.7%	47.6%	84.5%	83.9%
W	DT	DT1		40	35	79.2%	78.8%	92.4%	92.7%
W	DT	DT2		40	36	73.0%	59.2%	88.7%	84.4%
W	NP	NP1		40	35	74.8%	67.8%	87.5%	86.6%
W	NP	NP2		40	40	88.0%	83.9%	89.0%	90.5%
W	NP	NP3		40	43	98.5%	89.0%	93.7%	91.4%
W	NP	NP4		40	38	81.0%	69.1%	85.3%	85.6%
W	PC	PC2		40	40	87.0%	81.3%	87.0%	90.1%
W	PC	PC3		40	36	77.7%	80.3%	92.1%	94.5%
W	PL	PL1		40	32	66.3%	67.5%	86.9%	86.1%
W	PL	PL2		40	36	80.0%	68.8%	90.1%	88.1%
W	PL	PL3		40	37	86.5%	73.4%	95.6%	89.5%
<b>West Totals:</b>				<b>14</b>	<b>560</b>	<b>78.8%</b>	<b>73.2%</b>	<b>90.3%</b>	<b>89.7%</b>

## STUDENT SUCCESS PROGRAMS

DBA – AUDEO CHARTER SCHOOL · THE CHARTER SCHOOL OF SAN DIEGO

(A California Non-Profit Public Benefit Corporation)

Len Hering RADM, USN (ret) – Chairman,

Scott Barton – Member, David Crean – Member, Tim Morton – Member, Eric Schweinfurter – Member

### SPECIAL BOARD OF DIRECTORS MEETING MINUTES

Thursday, December 9, 2021, 9:00 a.m.

Via Video Conference and at

Clairemont RC 4340 Genesee Avenue, Suite 109, SD 92117, College Avenue RC 4585 College Drive, Suite C, SD, 92115, Downtown RC 1095 K Street Suite A, SD 92101, Euclid RC 220 Euclid Avenue, SD 92114, Lake Murray RC 8776 Lake Murray Blvd., SD 29119, Mira Mesa RC 8290 B, Mira Mesa Blvd., SD 92126, North Park RC 2940 North Park Way, SD 92104, Northgate RC 4125 Alpha Street, Suite C, SD 92113, Old Town, 2245 San Diego Avenue, Suite 115, SD 92110, Petco RC 1091 K Street, Suite A101, SD 92101, Point Loma RC 3145 Rosecrans Street, Suite D, SD 92110, Scripps Ranch RC 9910 Mira Mesa Blvd, Suite A2, SD 92131, Sorrento Mesa Office 10170 Huennekens Street, SD, 92121, Tierrasanta RC 10425 Tierrasanta Blvd, Suite 101, SD 92124, Woodman RC 2939 Alta View Drive, Suite B/CSD 92139, and Kearny Mesa RC 7520 Mesa College Drive, SD 92111, K5 Home School Resource Center 10725 Tierrasanta Boulevard, CA 92124 La Jolla RC 7458 Girard Avenue, SD 92037, Mission Valley East RC 3230 Camino Del Rio North, SD 92108

Access to the live video conference was accessible prior to the start of the meeting at

CSSD: <https://charterschool-sandiego.net/board-governance/>

Audeo: <https://www.audeocharterschool.net/board-of-directors/>

#### 1.0 OPEN SESSION

##### 1.1 Call to Order

Hering called the meeting to order at 9:10 a.m.

##### 1.2 Roll Call

Members present at the meeting were Scott Barton, Len Hering, Tim Morton, and Eric Schweinfurter.

Members Absent: David Crean.

Also in attendance: Lynne Alipio, Mary Bixby, Angela Neri, Cathryn Rambo, and Tim Tuter.

##### 1.3 Approval of Adoption of the Board Findings Pursuant to Government Code Section 54953(e)(1)

*The Charter School Board of Directors determines, in accordance with Government Code Section 54953(e)(1)(B), that meeting in person would present imminent risks to the health or safety of attendees. Pursuant to Government Code Section 54953(e)(3), the Board has also reconsidered the circumstances of the State of Emergency declared by the Governor on March 4, 2020 and finds the State of Emergency continues to directly impact the ability of the Directors to meet safely in person and/or that State or local officials continue to impose or recommend measures to promote social distancing.*

It was moved by Barton and seconded by Schweinfurter to Approve the Adoption of the Board Findings Pursuant to Government Code Section 54953(e)(1)

Ayes – 4, Nays- 0, Absent – 1, Abstain – 0, Motioned Approved.

##### 1.4 Establishment of Quorum

The following directors, constituting a quorum of the board were present at the meeting:  
Scott Barton, Len Hering, Tim Morton, and Eric Schweinfurter.

##### 1.5 Pledge of Allegiance

Hering led all in the Pledge of Allegiance.

**1.6 Approval of Agenda**

It was moved by Barton and seconded by Morton to Approve the Agenda.  
Ayes – 4, Nays- 0, Absent – 1, Abstain – 0, Motioned Approved.

**2.0 PUBLIC COMMENT**

**2.1 Non-agenda Public Comment**

There were no comments from the public.

**2.2 Agenda Items Public Comment**

There were no comments from the public.

**3.0 CONSENT AGENDA**

All matters listed under the consent agenda are considered by the Board to be routine and will be approved/enacted by the Board in one motion in the form listed below. Unless specifically requested by a Board member for further discussion or removed from the agenda, there will be no discussion of these items prior to the Board votes on them. The President recommends approval of all consent agenda items.

**3.1 Consent Action Items for the Audeo Charter School and The Charter School of San Diego for Each School**

**3.1.1 Approval of Meeting Minutes for December 1, 2021**

It was moved by Morton and seconded by Barton to Approve the Agenda.  
Ayes – 3, Nays- 0, Absent – 1, Abstain – 1, Motioned Approved.  
*Hering-Abstained*

**4.0 ACTION ITEMS**

**4.1 Action Items for Audeo Charter School**

**4.1.1 Approval of Educator Effectiveness Grant Plan**

It was moved by Barton and seconded by Morton to Approve the Agenda.  
Ayes – 4, Nays- 0, Absent – 1, Abstain – 0, Motioned Approved.

**4.2 Action Items for The Charter School of San Diego**

**4.2.1 Approval of Educator Effectiveness Grant Plan**

It was moved by Morton and seconded by Barton to Approve the Agenda.  
Ayes – 3, Nays- 0, Absent – 1, Abstain – 1, Motioned Approved.

**5.0 BOARD ANNOUNCEMENTS AND COMMENTS**

From time to time, the Board has topics of interest that they would like to share with the community. These are informational in nature and do not require action.

Bixby thanked Tim Morton for joining the SSP Board. Bixby also thanked the staff for their service to students and our community.

Hering thanked the staff for all their hard work, professionalism, and tenacity.

**6.0 ADJOURNMENT**

It was moved by Barton and seconded by Morton to adjourn the meeting at 9:28 a.m.  
Ayes – 4, Nays- 0, Absent – 1, Abstain – 0, Motioned Approved.

**Audeo Charter**  
**2020—2021 School Accountability Report Card**  
**Reported Using Data from the 2020—2021 School Year**  
**California Department of Education**

<b>Address:</b>	10170 Huennekens St. San Diego, CA , 92121-2964	<b>Principal:</b>	Veronica Radtke, School Coordinator
<b>Phone:</b>	(858) 678-2056	<b>Grade Span:</b>	K-12

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

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

### DataQuest

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

### California School Dashboard

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

## About This School

### Veronica Radtke, School Coordinator

Principal, Audeo Charter

#### About Our School

Audeo Charter School (Audeo) is an innovative, role model public school that dares to make a significant difference in the lives of students in grades K through 12. Offering an option to traditional schools, Audeo has innovated a different way of managing educational systems, both in instruction and operations. We serve as a role model because of five factors:

- **We transform the lives of students who are “at risk” in the educational system – taking many from failure to college bound.**
- **We run Audeo with strategic initiatives, action plans and the ability to set and measure results.**
- **We are innovative, responsive and agile.**
- **We hold teachers accountable for students’ learning and success.**
- **We are a successful prototype for educational reform.**

This futuristic public school is designed for students in grades K-12 who seek an alternative to the traditional approach to education. Independent study is the primary method of instruction, along with online courses, home school option, guest speakers, tutoring, and field trips to provide skills development and enrichment in the core curriculum.

Students can enroll in Audeo Charter School with parent request any day throughout the year. Student options include returning to comprehensive schools, earning a High School diploma, passing the California High School Proficiency Exam (CHSPE), passing the GED, or passing the High School Equivalency Test (HiSET). Each student receives a Pathways Personalized Education Plan supported through an extensive group of partnerships and alliances which provide services such as job development, pre-employment training, health maintenance, case-management, social and personal services and tutoring.

**Please Note: Audeo Charter School is a DASS school (Dashboard Alternative School Status) which uses modified methods of measurement for indicators that are aligned with the evaluation rubrics of the Local Control Funding Formula (LCFF) to evaluate the success or progress of schools that serve high-risk students. To be eligible for DASS, schools must have an unduplicated count of at least 70 percent of the school’s total enrollment comprised of high risk student groups including: Expelled, Suspended, Wards of the Court, Pregnant and/or Parenting, Recovered Dropouts, Habitually Truant, Retained more than once in kindergarten through grade eight, students who are credit deficient, students with a gap in enrollment, students with a high level of transiency, Foster Youth, and Homeless Youth. As an alternative option, students enroll with Audeo to address credit deficiencies before returning to a traditional school or may choose to complete the GED or HiSET, which are not factored into the four-year cohort graduation rate.**

#### Contact

Audeo Charter  
10170 Huennekens St.  
San Diego, CA 92121-2964

Phone: (858) 678-2056

Email: [info@audeocharterschool.net](mailto:info@audeocharterschool.net)

### Contact Information (School Year 2021—2022)

#### District Contact Information (School Year 2021—2022)

<b>District Name</b>	San Diego Unified
<b>Phone Number</b>	(619) 725-8000
<b>Superintendent</b>	Jackson, Lamont
<b>Email Address</b>	<a href="mailto:ljackson@sandi.net">ljackson@sandi.net</a>

#### School Contact Information (School Year 2021—2022)

<b>School Name</b>	Audeo Charter
<b>Street</b>	10170 Huennekens St.
<b>City, State, Zip</b>	San Diego, CA , 92121-2964
<b>Phone Number</b>	(858) 678-2056

<b>Website</b>	www.sandi.net
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<b>Principal</b>	Veronica Radtke, School Coordinator
<b>Email Address</b>	<a href="mailto:info@audeocharterschool.net">info@audeocharterschool.net</a>
<b>Website</b>	<a href="http://www.audeocharterschool.net">http://www.audeocharterschool.net</a>
<b>County-District-School (CDS) Code</b>	37683383731395

*Last updated: 2/1/22*

**School Description and Mission Statement (School Year 2021—2022)****The Vision**

The educational community known as Audeo Charter School is committed to the development of a personalized instructional program that demonstrates positive outcomes for each student. Audeo Charter School is dedicated to the creation of instructional, service, organizational, and governance models that can serve as prototypes for educational reform. Audeo Charter School is committed to collaborative efforts to improve the quality of life for students, their families, and the community it serves.

**The Mission**

Audeo Charter School will implement personalized educational programs to facilitate student achievement. These educational programs will demonstrate that standards-based educational reform can provide a prototype for changing the way teachers teach and students learn in the future.

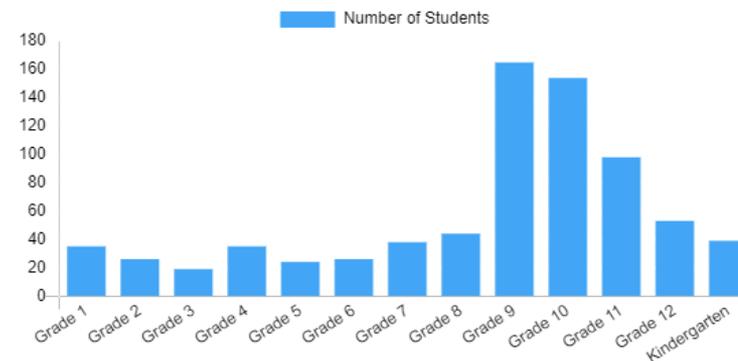
**Basic Values**

- Kids come first.
- Education at Audeo is personalized, individualized, and high quality.
- Audeo is made up of a community of highly professional people. These committed individuals are independent, self-motivated, high-energy people who speak for themselves. They work to create a positive, challenging environment that is centered on teaching and learning.
- Audeo uses business principles in managing the school.
- Audeo is committed to the creation of educational reform models centered on how effective educational organizations run, how teachers teach, and students learn.
- Audeo employees are accountable for their work.
- People-centered teams focus on supporting quality teaching and learning. Performance is measured on a variety of indicators that include productivity, credit ratio, auditability, quality, performance, and commitment to the vision of Audeo.
- Audeo is committed to the improvement of the quality of life for students, their families, and the community it serves.

*Last updated: 1/31/22*

**Student Enrollment by Grade Level (School Year 2020—2021)**

Grade Level	Number of Students
Grade 1	35
Grade 2	26
Grade 3	19
Grade 4	35
Grade 5	24
Grade 6	26
Grade 7	38
Grade 8	44
Grade 9	165
Grade 10	154
Grade 11	98
Grade 12	53
Kindergarten	39
Total Enrollment	756



Last updated: 1/31/22

**Student Enrollment by Student Group (School Year 2020—2021)**

Student Group	Percent of Total Enrollment
Female	51.20%
Male	48.70%
Non-Binary	0.10%
American Indian or Alaska Native	0.50%
Asian	1.20%
Black or African American	7.40%
Filipino	1.10%
Hispanic or Latino	48.40%

Student Group (Other)	Percent of Total Enrollment
English Learners	7.10%
Foster Youth	0.30%
Homeless	3.40%
Migrant	0.00%
Socioeconomically Disadvantaged	56.70%
Students with Disabilities	19.00%

Student Group	Percent of Total Enrollment
Native Hawaiian or Pacific Islander	0.10%
Two or More Races	6.90%
White	34.30%

## A. Conditions of Learning

### State Priority: Basic

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

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

### Teacher Preparation and Placement (School Year 2020—2021)

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

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

*Last updated:*

### Teachers Without Credentials and Misassignments (School Year 2020—2021)

Authorization/Assignment	Number
Permits and Waivers	
Misassignments	
Vacant Positions	
Total Teachers Without Credentials and Misassignments	

*Last updated:*

**Credentialed Teachers Assigned Out-of-Field  
(considered "out-of-field" under ESSA) (School Year 2020—2021)**

Indicator	Number
Credentialed Teachers Authorized on a Permit or Waiver	
Local Assignment Options	
Total Out-of-Field Teachers	

*Last updated:*

**Class Assignments (School Year 2020—2021)**

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

*Last updated:*

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

**School Facility Conditions and Planned Improvements**

Audeo's resource centers are exceptionally attractive, clean, safe, and orderly. Every resource center is fully equipped with student computers linked to the Internet, teacher laptop computers, audio-visual equipment, individual teacher telephones, bookshelves, textbooks, storage, alarm systems, smoke detectors, tables, chairs, and teacher desks.

*Last updated: 1/31/22*

## B. Pupil Outcomes

### State Priority: Pupil Achievement

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

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

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

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

- **SARC Reporting in the 2020–2021 School Year Only**

Where the most viable option, LEAs were required to administer the statewide summative assessments for ELA and mathematics. Where a statewide summative assessment was not the most viable option for the LEA (or for one or more grade-level[s] within the LEA) due to the pandemic, LEAs were allowed to report results from a different assessment that met the criteria established by the State Board of Education (SBE) on March 16, 2021. The assessments were required to be:

- Aligned with CA CCSS for ELA and mathematics;
- Available to students in grades 3 through 8, and grade 11; and
- Uniformly administered across a grade, grade span, school, or district to all eligible students.

- **Options:** Note that the CAAs could only be administered in-person following health and safety requirements. If it was not viable for the LEA to administer the CAAs in person with health and safety guidelines in place, the LEA was directed to not administer the tests. There were no other assessment options available for the CAAs. Schools administered the Smarter Balanced Summative Assessments for ELA and mathematics, other assessments that meet the SBE criteria, or a combination of both, and they could only choose one of the following:

- Smarter Balanced ELA and mathematics summative assessments;
- Other assessments meeting the SBE criteria; or
- Combination of Smarter Balanced ELA and mathematics summative assessments and other assessments.

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

#### CAASPP Test Results in ELA and Mathematics for All Students

##### Grades Three through Eight and Grade Eleven taking and completing a state-administered assessment

##### Percentage of Students Meeting or Exceeding the State Standard

Subject	School 2019-2020	School 2020-2021	District 2019-2020	District 2020-2021	State 2019-2020	State 2020-2021
English Language Arts / Literacy (grades 3-8 and 11)	N/A	N/A	N/A	N/A	N/A	N/A
Mathematics (grades 3-8 and 11)	N/A	N/A	N/A	N/A	N/A	N/A

Note: The 2019–2020 data cells with N/A values indicate that the 2019–2020 data are not available due to the COVID-19 pandemic and resulting summative test suspension. The Executive Order N-30-20 was issued which waived the assessment, accountability, and reporting requirements for the 2019–2020 school year.

Note: The 2020–2021 data cells have N/A values because these data are not comparable to other year data due to the COVID-19 pandemic during the 2020–2021 school year. Where the CAASPP assessments in ELA and/or mathematics is not the most viable option, the LEAs were allowed to administer local

assessments. Therefore, the 2020–2021 data between school years for the school, district, state are not an accurate comparison. As such, it is inappropriate to compare results of the 2020–2021 school year to other school years.

*Last updated: 1/31/22*

**CAASPP Test Results in ELA by Student Group for students taking and completing a state-administered assessment  
Grades Three through Eight and Grade Eleven  
(School Year 2020—2021)**

<b>Student Group</b>	<b>Total Enrollment</b>	<b>Number Tested</b>	<b>Percent Tested</b>	<b>Percent Not Tested</b>	<b>Percent Met or Exceeded</b>
All Students	272	NT	NT	NT	NT
Female	150	NT	NT	NT	NT
Male	122	NT	NT	NT	NT
American Indian or Alaska Native	--	NT	NT	NT	NT
Asian	--	NT	NT	NT	NT
Black or African American	20	NT	NT	NT	NT
Filipino	--	NT	NT	NT	NT
Hispanic or Latino	111	NT	NT	NT	NT
Native Hawaiian or Pacific Islander	0	0	0	0	0
Two or More Races	18	NT	NT	NT	NT
White	114	NT	NT	NT	NT
English Learners	16	NT	NT	NT	NT
Foster Youth	0	0	0	0	0
Homeless					
Military	--	NT	NT	NT	NT
Socioeconomically Disadvantaged	131	NT	NT	NT	NT
Students Receiving Migrant Education Services	0	0	0	0	0
Students with Disabilities	51	NT	NT	NT	NT

Note: N/T values indicate that this school did not test students using the CAASPP for ELA.

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

*Last updated: 1/31/22*

**CAASPP Test Results in Mathematics by Student Group for students taking and completing a state-administered assessment  
Grades Three through Eight and Grade Eleven  
(School Year 2020—2021)**

<b>Student Group</b>	<b>Total Enrollment</b>	<b>Number Tested</b>	<b>Percent Tested</b>	<b>Percent Not Tested</b>	<b>Percent Met or Exceeded</b>
All Students	272	NT	NT	NT	NT
Female	150	NT	NT	NT	NT
Male	122	NT	NT	NT	NT
American Indian or Alaska Native	--	NT	NT	NT	NT
Asian	--	NT	NT	NT	NT
Black or African American	20	NT	NT	NT	NT
Filipino	--	NT	NT	NT	NT
Hispanic or Latino	111	NT	NT	NT	NT
Native Hawaiian or Pacific Islander	0	0	0	0	0
Two or More Races	18	NT	NT	NT	NT
White	114	NT	NT	NT	NT
English Learners	16	NT	NT	NT	NT
Foster Youth	0	0	0	0	0
Homeless					
Military	--	NT	NT	NT	NT
Socioeconomically Disadvantaged	131	NT	NT	NT	NT
Students Receiving Migrant Education Services	0	0	0	0	0
Students with Disabilities	51	NT	NT	NT	NT

Note: N/T values indicate that this school did not test students using the CAASPP for Mathematics.

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

*Last updated: 1/31/22*

**Local Assessment Test Results in ELA by Student Group**  
**Assessment Name(s): NWEA MAP Growth Reading**  
**Grades Three through Eight and Grade Eleven (School Year 2020—2021)**

Student Group	Total Enrollment	Number Tested	Percent Tested	Percent Not Tested	Percent At or Above Grade Level
All Students	271	194	72	28	57.2
Female	148	108	73	27	55.6
Male	123	86	70	30	59.3
American Indian or Alaska Native	--	--	--	--	--
Asian	--	--	--	--	--
Black or African American	19	--	--	--	--
Filipino	--	--	--	--	--
Hispanic or Latino	108	81	75	25	44.4
Native Hawaiian or Pacific Islander	--	--	--	--	--
Two or More Races	15	--	--	--	--
White	119	83	70	30	68.7
English Learners	52	34	65	35	35.3
Foster Youth	--	--	--	--	--
Homeless	--	--	--	--	--
Military					
Socioeconomically Disadvantaged	13	--	--	--	--
Students Receiving Migrant Education Services					
Students with Disabilities	19	--	--	--	--

\*At or above the grade-level standard in the context of the local assessment administered.

Note: LEAs/schools will populate this table for schools in cases where the school administered a local assessment.

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

Note: In cases where the school administered only the CAASPP assessment, LEAs/schools will populate this table with "N/A" values in all cells, meaning this table is Not Applicable for this school.

Last updated: 2/1/22

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

<b>Subject</b>	<b>School 2019-2020</b>	<b>School 2020-2021</b>	<b>District 2019-2020</b>	<b>District 2020-2021</b>	<b>State 2019-2020</b>	<b>State 2020-2021</b>
Science (grades 5, 8, and high school)	N/A	NT	N/A	--	N/A	28.72

Note: The 2019–2020 data cells with N/A values indicate that the 2019–2020 data are not available due to the COVID-19 pandemic and resulting summative testing suspension. The Executive Order N-30-20 was issued which waived the assessment, accountability, and reporting requirements for the 2019–2020 school year.

Note: For any 2020–2021 data cells with N/T values indicate that this school did not test students using the CAASPP Science.

*Last updated: 1/31/22*

**CAASPP Test Results in Science by Student Group**  
**Grades Five, Eight and High School (School Year 2020—2021)**

Student Group	Total Enrollment	Number Tested	Percent Tested	Percent Not Tested	Percent Met or Exceeded
All Students	180	NT	NT	NT	NT
Female	86	NT	NT	NT	NT
Male	93	NT	NT	NT	NT
American Indian or Alaska Native	0	0	0	0	0
Asian	--	NT	NT	NT	NT
Black or African American	12	NT	NT	NT	NT
Filipino	0	0	0	0	0
Hispanic or Latino	87	NT	NT	NT	NT
Native Hawaiian or Pacific Islander	--	NT	NT	NT	NT
Two or More Races	16	NT	NT	NT	NT
White	60	NT	NT	NT	NT
English Learners	--	NT	NT	NT	NT
Foster Youth	--	NT	NT	NT	NT
Homeless					
Military	--	NT	NT	NT	NT
Socioeconomically Disadvantaged	96	NT	NT	NT	NT
Students Receiving Migrant Education Services	0	0	0	0	0
Students with Disabilities	38	NT	NT	NT	NT

Note: N/T values indicate that this school did not test students using the CAASPP for Science.

Last updated: 1/31/22

**Career Technical Education (CTE) Programs (School Year 2020—2021)**

Career Technical Education (CTE) opportunities vary according to the students' goals. Student strengths, interests and values are discussed with the student and parents and become part of the Pathways Personalized Educational Plan (PPEP). Audeo offers more than 20 CTE courses and 5 Career Pathways in either an independent study or online environments. Eleventh and twelfth grade students research career paths and post-secondary career options to compile an electronic portfolio as part of a required senior course called "Pathways Exhibition" which leads to a Workforce Readiness Certificate. Counselors, teachers, career resource speakers, administrators and parents provide assistance in the educational and career decision making process. Because of the flexibility in this school's schedule, students are able to work while traditional schools are in session, which broadens the range of job opportunities and work-based learning available. The school allows students the freedom to participate in community events and encourages them to volunteer. In order to broaden their experience and prepare students for the transition from school to career, students who remain at Audeo Charter School until graduation are required to earn two credits in a specified CTE course, Service Learning, or in our state approved General Work Experience Education (WEE) courses. In this way, students have the chance to experience the world outside school as either volunteers or while learning a career skill on their path to becoming College and Career Ready.

*Last updated: 1/31/22*

**Career Technical Education (CTE) Participation (School Year 2020—2021)**

Measure	CTE Program Participation
Number of Pupils Participating in CTE	231
Percent of Pupils that Complete a CTE Program and Earn a High School Diploma	--
Percent of CTE Courses that are Sequenced or Articulated Between the School and Institutions of Postsecondary Education	--

*Last updated: 1/31/22*

**Course Enrollment/Completion of University of California (UC) and/or California State University (CSU) Admission Requirements**

UC/CSU Course Measure	Percent
2020–2021 Pupils Enrolled in Courses Required for UC/CSU Admission	97.66%
2019-2020 Graduates Who Completed All Courses Required for UC/CSU Admission	21.54%

*Last updated: 1/31/22*

**State Priority: Other Pupil Outcomes**

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

- Pupil outcomes in the subject area of physical education

**California Physical Fitness Test Results (School Year 2020—2021)**

Grade Level	Percentage of Students Meeting Four of Six Fitness Standards	Percentage of Students Meeting Five of Six Fitness Standards	Percentage of Students Meeting Six of Six Fitness Standards
5	N/A	N/A	N/A
7	N/A	N/A	N/A
9	N/A	N/A	N/A

Note: Due to the COVID-19 crisis, the Physical Fitness Test was suspended during the 2020–2021 school year and therefore no data are reported.

*Last updated: 1/31/22*

## C. Engagement

### State Priority: Parental Involvement

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

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

#### Opportunities for Parental Involvement (School Year 2021-2022)

Parents become involved in their children's education at Audeo Charter School from the beginning. Parents are a part of the initial meeting with the teacher, when they learn school requirements. Together with the student, they develop each student's unique Pathways Personalized Educational Plan (PPEP). Parents are encouraged to call and make appointments at any time; parents are involved in their child's education on a daily/weekly basis. Parents are encouraged to give feedback through the annual LCAP parent survey, open houses, senior exit orientation meetings, master agreement signings, board meetings, and graduation.

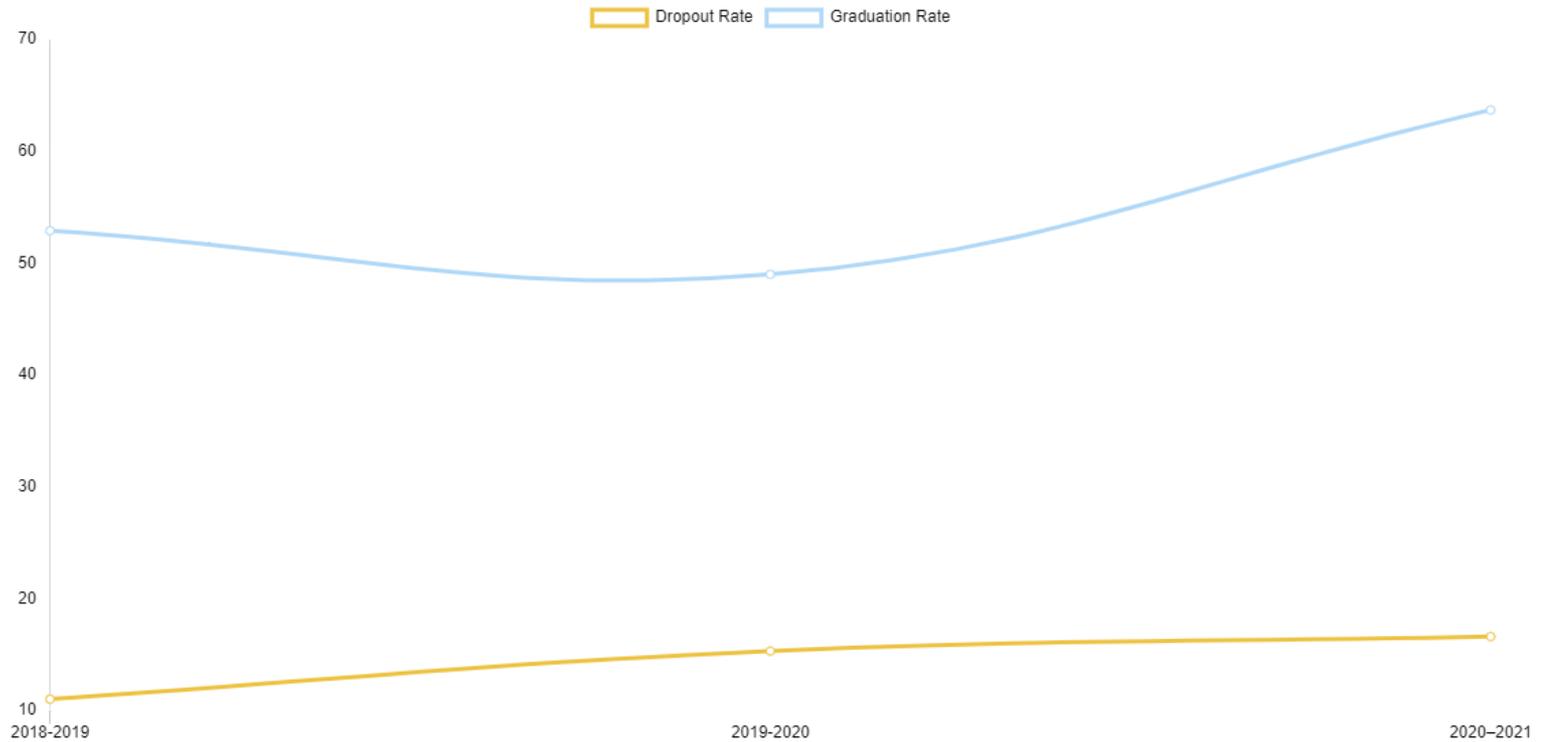
**State Priority: Pupil Engagement**

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

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

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

Indicator	School 2018-2019	School 2019-2020	School 2020-2021	District 2018-2019	District 2019-2020	District 2020-2021	State 2018-2019	State 2019-2020	State 2020-2021
Dropout Rate	11.00%	15.30%	16.60%	4.10%	3.90%	4.20%	9.00%	8.90%	9.40%
Graduation Rate	52.90%	49.00%	63.70%	84.70%	85.60%	85.90%	84.50%	84.20%	83.60%



**Graduation Rate by Student Group (Four-Year Cohort Rate)**  
**(School Year 2020—2021)**

<b>Student Group</b>	<b>Number of Students in Cohort</b>	<b>Number of Cohort Graduates</b>	<b>Cohort Graduation Rate</b>
All Students	157	100	63.7
Female	73	52	71.2
Male	83	47	56.6
Non-Binary	--	--	--
American Indian or Alaska Native	--	--	56.6
Asian	0	0	0.00
Black or African American	12	8	66.7
Filipino	0	0	0.00
Hispanic or Latino	79	45	57.0
Native Hawaiian or Pacific Islander	--	--	--
Two or More Races	20	13	65.0
White	43	33	76.7
English Learners	--	--	--
Foster Youth	--	--	--
Homeless	22	11	50.0
Socioeconomically Disadvantaged	118	68	57.6
Students Receiving Migrant Education Services	--	--	--
Students with Disabilities	33	20	60.6

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

*Last updated:*

**Chronic Absenteeism by Student Group**  
(School Year 2020—2021)

<b>Student Group</b>	<b>Cumulative Enrollment</b>	<b>Chronic Absenteeism Eligible Enrollment</b>	<b>Chronic Absenteeism Count</b>	<b>Chronic Absenteeism Rate</b>
All Students	1363	1081	274	25.3
Female	707	555	133	24.0
Male	653	524	140	26.7
American Indian or Alaska Native	62	35	3	26.7
Asian	4	4	2	50.0
Black or African American	70	67	18	26.9
Filipino	22	15	2	13.3
Hispanic or Latino	511	453	153	33.8
Native Hawaiian or Pacific Islander	1	1	0	0.0
Two or More Races	126	98	23	23.5
White	567	408	73	17.9
English Learners	74	64	23	35.9
Foster Youth	6	4	3	75.0
Homeless	36	35	13	37.1
Socioeconomically Disadvantaged	613	545	180	33.0
Students Receiving Migrant Education Services	0	0	0	0.0
Students with Disabilities	213	186	58	31.2

*Last updated:*

### State Priority: School Climate

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

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

#### Suspensions and Expulsions

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

Rate	School 2018-2019	School 2020-2021	District 2018-2019	District 2020-2021	State 2018-2019	State 2020-2021
Suspensions	0.00%	0.00%	3.65%	0.06%	3.47%	0.20%
Expulsions	0.00%	0.00%	0.08%	0.00%	0.08%	0.00%

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

#### Suspensions and Expulsions for School Year 2019—2020 Only

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

Rate	School 2019-2020	District 2019-2020	State 2019-2020
Suspensions	0.16%	2.24%	2.45%
Expulsions	0.00%	0.04%	0.05%

Note: The 2019-2020 suspensions and expulsions rate data are not comparable to other year data because the 2019-2020 school year is a partial school year due to the COVID-19 crisis. As such, it would be inappropriate to make any comparisons in rates of suspensions and expulsions in the 2019-2020 school year compared to other school years.

*Last updated: 1/31/22*

**Suspensions and Expulsions by Student Group  
(School Year 2020—2021)**

Student Group	Suspensions Rate	Expulsions Rate
All Students	0	0
Female	0	0
Male	0	0
Non-Binary	0	0
American Indian or Alaska Native	0	0
Asian	0	0
Black or African American	0	0
Filipino	0	0
Hispanic or Latino	0	0
Native Hawaiian or Pacific Islander	0	0
Two or More Races	0	0
White	0	0
English Learners	0	0
Foster Youth	0	0
Homeless	0	0
Socioeconomically Disadvantaged	0	0
Students Receiving Migrant Education Services	0	0
Students with Disabilities	0	0

*Last updated:*

**School Safety Plan (School Year 2021-2022)**

The safety plan is updated and approved annually. It includes disaster procedures, procedures for safe entry and exit of pupils, procedures for serious disciplinary problems, lockdown procedures, loitering law, going to and from school safely, zero tolerance policy, emergency resource information, emergency disaster kit, and emergency quick reference guide. A sexual harassment policy, child abuse reporting procedures, school dress codes and the school discipline policy are also included. Regular safety drills are conducted and recorded three times per year.

*Last updated: 1/31/22*

### **D. Other SARC information**

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

**Ratio of Pupils to Academic Counselor (School Year 2020—2021)**

Title	Ratio
Pupils to Academic Counselor*	581.5

Last updated: 1/1/00

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

**Student Support Services Staff (School Year 2020—2021)**

Title	Number of FTE* Assigned to School
Counselor (Academic, Social/Behavioral or Career Development)	1.30
Library Media Teacher (Librarian)	0.00
Library Media Services Staff (Paraprofessional)	0.00
Psychologist	0.20
Social Worker	0.00
Nurse	0.70
Speech/Language/Hearing Specialist	0.00
Resource Specialist (non-teaching)	0.00
Other	7.40

Last updated: 1/1/00

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

**Expenditures Per Pupil and School Site Teacher Salaries (Fiscal Year 2019—2020)**

Level	Total Expenditures Per Pupil	Expenditures Per Pupil (Restricted)	Expenditures Per Pupil (Unrestricted)	Average Teacher Salary
School Site	\$14124.00	\$768.00	\$13356.00	--
District	N/A	N/A	--	\$86877.00
Percent Difference – School Site and District	N/A	N/A	--	--
State	N/A	N/A	\$8443.83	\$84665.00
Percent Difference – School Site and State	N/A	N/A	--	--

Last updated: 1/31/22

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

**Types of Services Funded (Fiscal Year 2020–2021)**

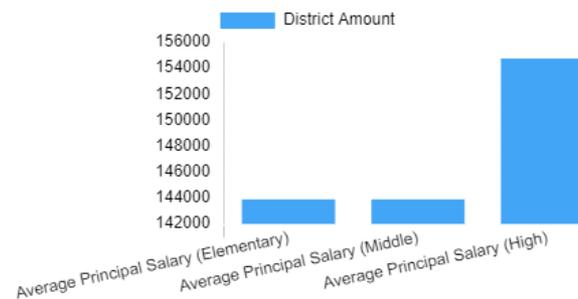
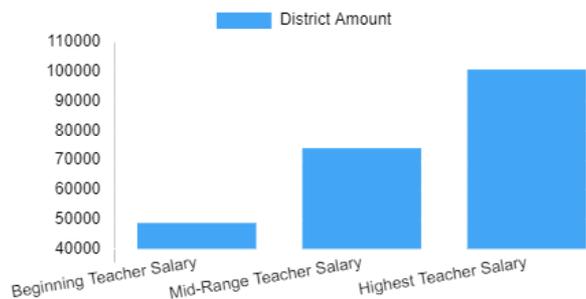
As a 501c3 non-profit corporation, Student Success Programs, Inc. has full authority and discretion in the management of all its fiscal matters. The latitude to determine the use of funds is accompanied by an obligation to remain revenue neutral and to submit an audited financial report annually to the District. More than half of the funds the school receives go to certificated instructors who work directly with students. Funds are also used for purchasing up-to-date instructional materials and technology.

*Last updated: 1/31/22*

**Teacher and Administrative Salaries (Fiscal Year 2019—2020)**

Category	District Amount	State Average For Districts In Same Category
Beginning Teacher Salary	\$48792.00	\$50897.00
Mid-Range Teacher Salary	\$74140.00	\$78461.00
Highest Teacher Salary	\$100772.00	\$104322.00
Average Principal Salary (Elementary)	\$139968.00	\$131863.00
Average Principal Salary (Middle)	\$143902.00	\$137086.00
Average Principal Salary (High)	\$154753.00	--
Superintendent Salary	\$290907.00	\$297037.00
Percent of Budget for Teacher Salaries	34.00%	32.00%
Percent of Budget for Administrative Salaries	5.00%	5.00%

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



*Last updated:*

**Advanced Placement (AP) Courses (School Year 2020—2021)****Percent of Students in AP Courses** 1.50%

Subject	Number of AP Courses Offered*
Computer Science	0
English	2
Fine and Performing Arts	0
Foreign Language	0
Mathematics	0
Science	0
Social Science	7
Total AP Courses Offered*	9.00%

*Last updated: 1/31/22*

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

**Professional Development**

Measure	2019-2020	2020-2021	2021-2022
Number of school days dedicated to Staff Development and Continuous Improvement	14	14	14

**Charter School of San Diego**  
**2020—2021 School Accountability Report Card**  
**Reported Using Data from the 2020—2021 School Year**  
**California Department of Education**

<b>Address:</b>	10170 Huennekens St. San Diego, CA , 92121-2964	<b>Principal:</b>	Jay Garrity, Admin. of Instructional Services
<b>Phone:</b>	(858) 678-2050	<b>Grade Span:</b>	6-12

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

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

### DataQuest

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

### California School Dashboard

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

## About This School

### Jay Garrity, Admin. of Instructional Services

Principal, Charter School of San Diego

#### About Our School

The Charter School of San Diego (CSSD) is an innovative, role model public school that dares to make a significant difference in the lives of students in grades 6 through 12. Offering an option to traditional schools, CSSD has innovated a different way of managing educational systems, both in instruction and operations. We serve as a role model because of five factors:

- We transform the lives of students who are “at risk” in the educational system – taking many from failure to college bound.
- We run CSSD with strategic initiatives, action plans and the ability to set and measure results.
- We are innovative, responsive and agile.
- We hold teachers accountable for students’ learning and success.
- We are a successful prototype for educational reform.

This futuristic public school is designed for students in grades 6-12 who seek an alternative to the traditional approach to education. Independent study is the primary method of instruction, along with online courses, guest speakers, tutoring, and field trips to provide skills development and enrichment in the core curriculum.

Students can enroll in The Charter School of San Diego with parent request any day throughout the year.

Student options include returning to comprehensive schools, earning a High School diploma, passing the California High School Proficiency Exam (CHSPE) passing the GED, or passing the High School Equivalency Test (HiSET). Each student receives a Pathways Personalized Education Plan supported through an extensive group of partnerships and alliances which provide services such as job development, pre-employment training, health maintenance, case-management, social and personal services and tutoring.

**Please Note: The Charter School of San Diego is a DASS school (Dashboard Alternative School Status) which uses modified methods of measurement for indicators that are aligned with the evaluation rubrics of the Local Control Funding Formula (LCFF) to evaluate the success or progress of schools that serve high-risk students. To be eligible for DASS, schools must have an unduplicated count of at least 70 percent of the school’s total enrollment comprised of high risk student groups including: Expelled, Suspended, Wards of the Court, Pregnant and/or Parenting, Recovered Dropouts, Habitually Truant, Retained more than once in kindergarten through grade eight, students who are credit deficient, students with a gap in enrollment, students with a high level of transiency, Foster Youth, and Homeless Youth. As an alternative option, students enroll with CSSD to address credit deficiencies before returning to a traditional school or may choose to complete the GED or HiSET, which are not factored into the four-year cohort graduation rate.**

#### Contact

Charter School of San Diego  
10170 Huennekens St.  
San Diego, CA 92121-2964

Phone: (858) 678-2050

Email: [info@charterschool-sandiego.net](mailto:info@charterschool-sandiego.net)

#### Contact Information (School Year 2021—2022)

##### District Contact Information (School Year 2021—2022)

<b>District Name</b>	San Diego Unified
<b>Phone Number</b>	(619) 725-8000
<b>Superintendent</b>	Jackson, Lamont

##### School Contact Information (School Year 2021—2022)

<b>School Name</b>	Charter School of San Diego
<b>Street</b>	10170 Huennekens St.
<b>City, State, Zip</b>	San Diego, CA , 92121-2964

<b>Email Address</b>	<a href="mailto:ljackson@sandi.net">ljackson@sandi.net</a>
<b>Website</b>	<a href="http://www.sandi.net">www.sandi.net</a>

<b>Phone Number</b>	(858) 678-2050
<b>Principal</b>	Jay Garrity, Admin. of Instructional Services
<b>Email Address</b>	<a href="mailto:info@charterschool-sandiego.net">info@charterschool-sandiego.net</a>
<b>Website</b>	<a href="http://www.charterschool-sandiego.net">http://www.charterschool-sandiego.net</a>
<b>County-District-School (CDS) Code</b>	37683383730959

*Last updated: 2/1/22*

**School Description and Mission Statement (School Year 2021—2022)****The Vision**

The educational community known as The Charter School of San Diego-Student Success Programs is committed to the development of a personalized instructional program that demonstrates positive outcomes for each student. The Charter School of San Diego is dedicated to the creation of instructional, service, organizational, and governance models that can serve as prototypes for educational reform. The Charter School of San Diego is committed to collaborative efforts to improve the quality of life for students, their families, and the community it serves.

**The Mission**

The Charter School of San Diego will implement personalized educational programs to facilitate student achievement. These educational programs will demonstrate that standards-based educational reform can provide a prototype for changing the way teachers teach and students learn in the future.

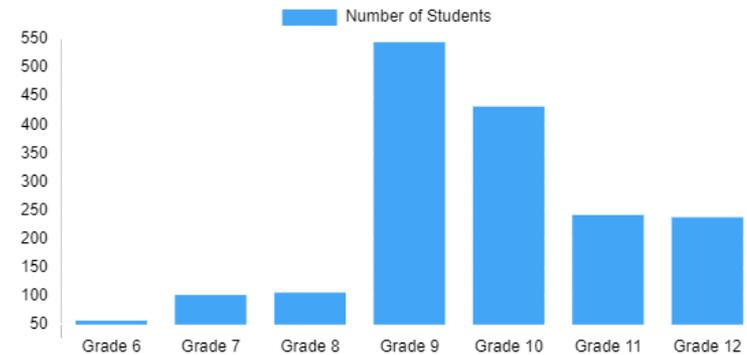
**Basic Values**

- Kids come first.
- Education at CSSD is personalized, individualized, and high quality.
- CSSD is made up of a community of highly professional people. These committed individuals are independent, self-motivated, high-energy people who speak for themselves. They work to create a positive, challenging environment that is centered on teaching and learning.
- CSSD uses business principles in managing the school.
- CSSD is committed to the creation of educational reform models centered on how effective educational organizations run, how teachers teach, and students learn.
- CSSD employees are accountable for their work.
- People-centered teams focus on supporting quality teaching and learning. Performance is measured on a variety of indicators that include productivity, credit ratio, auditability, quality, performance, and commitment to the vision of CSSD.
- CSSD is committed to the improvement of the quality of life for students, their families, and the community it serves.

*Last updated: 2/1/22*

**Student Enrollment by Grade Level (School Year 2020—2021)**

Grade Level	Number of Students
Grade 6	57
Grade 7	102
Grade 8	106
Grade 9	545
Grade 10	432
Grade 11	242
Grade 12	238
Total Enrollment	1722



Last updated: 2/1/22

**Student Enrollment by Student Group (School Year 2020—2021)**

Student Group	Percent of Total Enrollment
Female	50.60%
Male	49.20%
Non-Binary	0.20%
American Indian or Alaska Native	0.10%
Asian	1.90%
Black or African American	6.70%
Filipino	1.60%
Hispanic or Latino	59.30%
Native Hawaiian or Pacific Islander	0.50%
Two or More Races	6.60%
White	18.00%

Student Group (Other)	Percent of Total Enrollment
English Learners	12.70%
Foster Youth	0.80%
Homeless	5.50%
Migrant	0.00%
Socioeconomically Disadvantaged	68.60%
Students with Disabilities	25.60%

## A. Conditions of Learning

### State Priority: Basic

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

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

### Teacher Preparation and Placement (School Year 2020—2021)

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

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

*Last updated:*

### Teachers Without Credentials and Misassignments (School Year 2020—2021)

Authorization/Assignment	Number
Permits and Waivers	
Misassignments	
Vacant Positions	
Total Teachers Without Credentials and Misassignments	

*Last updated:*

**Credentialed Teachers Assigned Out-of-Field  
(considered "out-of-field" under ESSA) (School Year 2020—2021)**

Indicator	Number
Credentialed Teachers Authorized on a Permit or Waiver	
Local Assignment Options	
Total Out-of-Field Teachers	

*Last updated:*

**Class Assignments (School Year 2020—2021)**

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

*Last updated:*

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

**School Facility Conditions and Planned Improvements**

The Charter School of San Diego's resource centers are exceptionally attractive, clean, safe, and orderly. Every resource center is fully equipped with student computers linked to the Internet, teacher laptop computers, audio-visual equipment, individual teacher telephones, bookshelves, textbooks, storage, alarm systems, smoke detectors, tables, chairs, and teacher desks.

*Last updated: 2/1/22*

## B. Pupil Outcomes

### State Priority: Pupil Achievement

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

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

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

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

- **SARC Reporting in the 2020–2021 School Year Only**

Where the most viable option, LEAs were required to administer the statewide summative assessments for ELA and mathematics. Where a statewide summative assessment was not the most viable option for the LEA (or for one or more grade-level[s] within the LEA) due to the pandemic, LEAs were allowed to report results from a different assessment that met the criteria established by the State Board of Education (SBE) on March 16, 2021. The assessments were required to be:

- Aligned with CA CCSS for ELA and mathematics;
- Available to students in grades 3 through 8, and grade 11; and
- Uniformly administered across a grade, grade span, school, or district to all eligible students.

- **Options:** Note that the CAAs could only be administered in-person following health and safety requirements. If it was not viable for the LEA to administer the CAAs in person with health and safety guidelines in place, the LEA was directed to not administer the tests. There were no other assessment options available for the CAAs. Schools administered the Smarter Balanced Summative Assessments for ELA and mathematics, other assessments that meet the SBE criteria, or a combination of both, and they could only choose one of the following:

- Smarter Balanced ELA and mathematics summative assessments;
- Other assessments meeting the SBE criteria; or
- Combination of Smarter Balanced ELA and mathematics summative assessments and other assessments.

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

#### CAASPP Test Results in ELA and Mathematics for All Students

##### Grades Three through Eight and Grade Eleven taking and completing a state-administered assessment

##### Percentage of Students Meeting or Exceeding the State Standard

Subject	School 2019-2020	School 2020-2021	District 2019-2020	District 2020-2021	State 2019-2020	State 2020-2021
English Language Arts / Literacy (grades 3-8 and 11)	N/A	N/A	N/A	N/A	N/A	N/A
Mathematics (grades 3-8 and 11)	N/A	N/A	N/A	N/A	N/A	N/A

Note: The 2019–2020 data cells with N/A values indicate that the 2019–2020 data are not available due to the COVID-19 pandemic and resulting summative test suspension. The Executive Order N-30-20 was issued which waived the assessment, accountability, and reporting requirements for the 2019–2020 school year.

Note: The 2020–2021 data cells have N/A values because these data are not comparable to other year data due to the COVID-19 pandemic during the 2020–2021 school year. Where the CAASPP assessments in ELA and/or mathematics is not the most viable option, the LEAs were allowed to administer local

assessments. Therefore, the 2020–2021 data between school years for the school, district, state are not an accurate comparison. As such, it is inappropriate to compare results of the 2020–2021 school year to other school years.

*Last updated: 2/1/22*

**CAASPP Test Results in ELA by Student Group for students taking and completing a state-administered assessment  
Grades Three through Eight and Grade Eleven  
(School Year 2020—2021)**

Student Group	Total Enrollment	Number Tested	Percent Tested	Percent Not Tested	Percent Met or Exceeded
All Students	596	NT	NT	NT	NT
Female	292	NT	NT	NT	NT
Male	302	NT	NT	NT	NT
American Indian or Alaska Native	0	0	0	0	0
Asian	13	NT	NT	NT	NT
Black or African American	30	NT	NT	NT	NT
Filipino	--	NT	NT	NT	NT
Hispanic or Latino	317	NT	NT	NT	NT
Native Hawaiian or Pacific Islander	0	0	0	0	0
Two or More Races	90	NT	NT	NT	NT
White	143	NT	NT	NT	NT
English Learners	58	NT	NT	NT	NT
Foster Youth	--	NT	NT	NT	NT
Homeless					
Military	--	NT	NT	NT	NT
Socioeconomically Disadvantaged	339	NT	NT	NT	NT
Students Receiving Migrant Education Services	0	0	0	0	0
Students with Disabilities	111	NT	NT	NT	NT

Note: N/T values indicate that this school did not test students using the CAASPP for ELA.

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

Last updated: 2/1/22

**CAASPP Test Results in Mathematics by Student Group for students taking and completing a state-administered assessment  
Grades Three through Eight and Grade Eleven  
(School Year 2020—2021)**

<b>Student Group</b>	<b>Total Enrollment</b>	<b>Number Tested</b>	<b>Percent Tested</b>	<b>Percent Not Tested</b>	<b>Percent Met or Exceeded</b>
All Students	596	NT	NT	NT	NT
Female	292	NT	NT	NT	NT
Male	302	NT	NT	NT	NT
American Indian or Alaska Native	0	0	0	0	0
Asian	13	NT	NT	NT	NT
Black or African American	30	NT	NT	NT	NT
Filipino	--	NT	NT	NT	NT
Hispanic or Latino	317	NT	NT	NT	NT
Native Hawaiian or Pacific Islander	0	0	0	0	0
Two or More Races	90	NT	NT	NT	NT
White	143	NT	NT	NT	NT
English Learners	58	NT	NT	NT	NT
Foster Youth	--	NT	NT	NT	NT
Homeless					
Military	--	NT	NT	NT	NT
Socioeconomically Disadvantaged	339	NT	NT	NT	NT
Students Receiving Migrant Education Services	0	0	0	0	0
Students with Disabilities	111	NT	NT	NT	NT

Note: N/T values indicate that this school did not test students using the CAASPP for Mathematics.

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

Last updated: 2/1/22

**Local Assessment Test Results in ELA by Student Group**  
**Assessment Name(s): NWEA MAP Growth Reading**  
**Grades Three through Eight and Grade Eleven (School Year 2020—2021)**

Student Group	Total Enrollment	Number Tested	Percent Tested	Percent Not Tested	Percent At or Above Grade Level
All Students	580	467	81	19	61.7
Female	290	231	80	20	65.4
Male	288	234	81	19	57.7
American Indian or Alaska Native					
Asian	15	13	87	13	61.5
Black or African American	29	23	79	21	52.2
Filipino	--	--	--	--	--
Hispanic or Latino	307	251	82	18	56.6
Native Hawaiian or Pacific Islander					
Two or More Races	83	63	76	24	68.3
White	137	110	80	20	70.9
English Learners	104	80	77	23	31.3
Foster Youth					
Homeless	--	--	--	--	--
Military					
Socioeconomically Disadvantaged	56	50	89	11	14.0
Students Receiving Migrant Education Services					
Students with Disabilities	29	23	79	21	52.2

\*At or above the grade-level standard in the context of the local assessment administered.

Note: LEAs/schools will populate this table for schools in cases where the school administered a local assessment.

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

Note: In cases where the school administered only the CAASPP assessment, LEAs/schools will populate this table with "N/A" values in all cells, meaning this table is Not Applicable for this school.

Last updated: 2/1/22

**Local Assessment Test Results in Mathematics by Student Group**  
**Assessment Name(s): NWEA MAP Growth Math**  
**Grades Three through Eight and Grade Eleven (School Year 2020—2021)**

Student Group	Total Enrollment	Number Tested	Percent Tested	Percent Not Tested	Percent At or Above Grade Level
All Students	580	490	84	16	35.1
Female	290	236	81	19	36.9
Male	288	252	88	13	32.9
American Indian or Alaska Native					
Asian	15	13	87	13	38.5
Black or African American	29	25	86	14	32.0
Filipino	--	--	--	--	--
Hispanic or Latino	307	259	84	16	26.3
Native Hawaiian or Pacific Islander					
Two or More Races	83	68	82	18	47.1
White	137	118	86	14	47.5
English Learners	104	89	86	14	12.4
Foster Youth					
Homeless	--	--	--	--	--
Military					
Socioeconomically Disadvantaged	56	51	91	9	9.8
Students Receiving Migrant Education Services					
Students with Disabilities	29	25	86	14	32.0

\*At or above the grade-level standard in the context of the local assessment administered.

Note: LEAs/schools will populate this table for schools in cases where the school administered a local assessment.

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

Note: In cases where the school administered only the CAASPP assessment, LEAs/schools will populate this table with "N/A" values in all cells, meaning this table is Not Applicable for this school.

Last updated: 2/1/22

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

<b>Subject</b>	<b>School 2019-2020</b>	<b>School 2020-2021</b>	<b>District 2019-2020</b>	<b>District 2020-2021</b>	<b>State 2019-2020</b>	<b>State 2020-2021</b>
Science (grades 5, 8, and high school)	N/A	NT	N/A	--	N/A	28.72

Note: The 2019–2020 data cells with N/A values indicate that the 2019–2020 data are not available due to the COVID-19 pandemic and resulting summative testing suspension. The Executive Order N-30-20 was issued which waived the assessment, accountability, and reporting requirements for the 2019–2020 school year.

Note: For any 2020–2021 data cells with N/T values indicate that this school did not test students using the CAASPP Science.

*Last updated: 2/1/22*

**CAASPP Test Results in Science by Student Group**  
**Grades Five, Eight and High School (School Year 2020—2021)**

Student Group	Total Enrollment	Number Tested	Percent Tested	Percent Not Tested	Percent Met or Exceeded
All Students	362	NT	NT	NT	NT
Female	184	NT	NT	NT	NT
Male	176	NT	NT	NT	NT
American Indian or Alaska Native	0	0	0	0	0
Asian	--	NT	NT	NT	NT
Black or African American	24	NT	NT	NT	NT
Filipino	--	NT	NT	NT	NT
Hispanic or Latino	183	NT	NT	NT	NT
Native Hawaiian or Pacific Islander	0	0	0	0	0
Two or More Races	57	NT	NT	NT	NT
White	93	NT	NT	NT	NT
English Learners	19	NT	NT	NT	NT
Foster Youth	--	NT	NT	NT	NT
Homeless					
Military	--	NT	NT	NT	NT
Socioeconomically Disadvantaged	192	NT	NT	NT	NT
Students Receiving Migrant Education Services	0	0	0	0	0
Students with Disabilities	73	NT	NT	NT	NT

Note: N/T values indicate that this school did not test students using the CAASPP for Science.

Last updated: 2/1/22

**Career Technical Education (CTE) Programs (School Year 2020—2021)**

Career Technical Education (CTE) opportunities vary according to the students' goals. Student strengths, interests and values are discussed with the student and parents and become part of the Pathways Personalized Educational Plan (PPEP). CSSD offers more than 20 CTE courses and 5 Career Pathways in either an independent study or online environments. Eleventh and twelfth grade students research career paths and post-secondary career options to compile an electronic portfolio as part of a required senior course called "Pathways Exhibition" which leads to a Workforce Readiness Certificate. Counselors, teachers, career resource speakers, administrators and parents provide assistance in the educational and career decision making process. Because of the flexibility in this school's schedule, students are able to work while traditional schools are in session, which broadens the range of job opportunities and work-based learning available. The school allows students the freedom to participate in community events and encourages them to volunteer. In order to broaden their experience and prepare students for the transition from school to career, students who remain at The Charter School of San Diego until graduation are required to earn two credits in a specified CTE course, Service Learning, or in our state approved General Work Experience Education (WEE) courses. In this way, students have the chance to experience the world outside school as either volunteers or while learning a career skill on their path to becoming College and Career Ready.

*Last updated: 2/1/22***Career Technical Education (CTE) Participation (School Year 2020—2021)**

Measure	CTE Program Participation
Number of Pupils Participating in CTE	610
Percent of Pupils that Complete a CTE Program and Earn a High School Diploma	--
Percent of CTE Courses that are Sequenced or Articulated Between the School and Institutions of Postsecondary Education	4.8

*Last updated: 2/1/22***Course Enrollment/Completion of University of California (UC) and/or California State University (CSU) Admission Requirements**

UC/CSU Course Measure	Percent
2020–2021 Pupils Enrolled in Courses Required for UC/CSU Admission	95.19%
2019-2020 Graduates Who Completed All Courses Required for UC/CSU Admission	5.28%

*Last updated: 2/1/22*

### State Priority: Other Pupil Outcomes

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

- Pupil outcomes in the subject area of physical education

#### California Physical Fitness Test Results (School Year 2020—2021)

Grade Level	Percentage of Students Meeting Four of Six Fitness Standards	Percentage of Students Meeting Five of Six Fitness Standards	Percentage of Students Meeting Six of Six Fitness Standards
5	N/A	N/A	N/A
7	--	--	--
9	--	--	--

Note: Due to the COVID-19 crisis, the Physical Fitness Test was suspended during the 2020–2021 school year and therefore no data are reported.

*Last updated: 2/1/22*

## C. Engagement

### State Priority: Parental Involvement

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

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

#### Opportunities for Parental Involvement (School Year 2021-2022)

Parents become involved in their children's education at The Charter School of San Diego from the beginning. Parents are a part of the initial meeting with the teacher, when they learn school requirements. Together with the student, they develop each student's unique Pathways Personalized Educational Plan (PPEP). Parents are encouraged to call and make appointments at any time; parents are involved in their child's education on a daily/weekly basis. Parents are encouraged to give feedback through the annual LCAP parent survey, open houses, senior exit orientation meetings, master agreement signings, board meetings, and graduation.

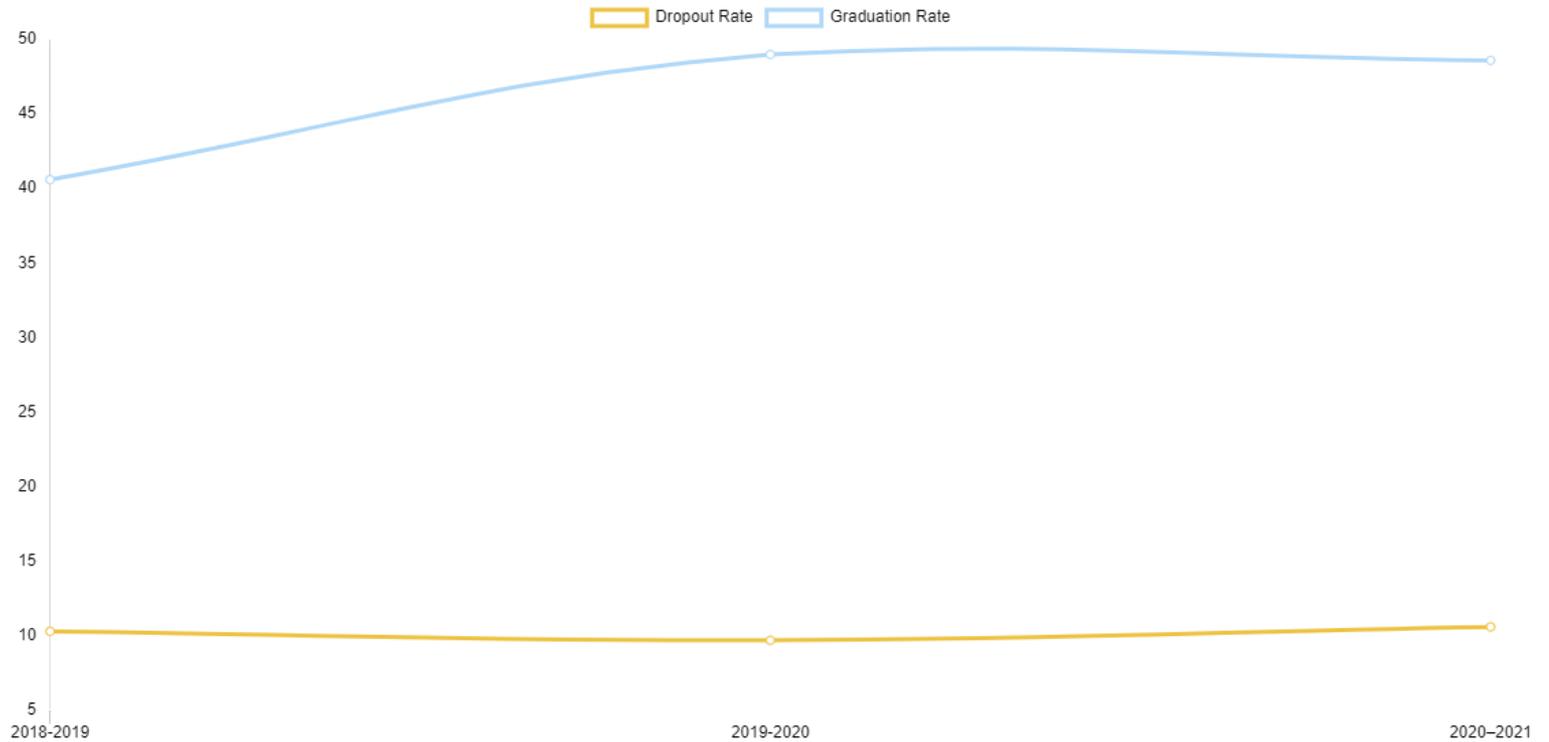
**State Priority: Pupil Engagement**

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

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

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

Indicator	School 2018-2019	School 2019-2020	School 2020-2021	District 2018-2019	District 2019-2020	District 2020-2021	State 2018-2019	State 2019-2020	State 2020-2021
Dropout Rate	10.30%	9.70%	10.60%	4.10%	3.90%	4.20%	9.00%	8.90%	9.40%
Graduation Rate	40.60%	49.00%	48.60%	84.70%	85.60%	85.90%	84.50%	84.20%	83.60%



**Graduation Rate by Student Group (Four-Year Cohort Rate)**  
(School Year 2020—2021)

Student Group	Number of Students in Cohort	Number of Cohort Graduates	Cohort Graduation Rate
All Students	593	288	48.6
Female	288	151	52.4
Male	305	137	44.9
Non-Binary	--	--	0.0
American Indian or Alaska Native	--	--	44.9
Asian	0	0	0.00
Black or African American	44	20	45.5
Filipino	13	7	53.8
Hispanic or Latino	339	150	44.2
Native Hawaiian or Pacific Islander	--	--	--
Two or More Races	45	26	57.8
White	110	66	60.0
English Learners	85	24	28.2
Foster Youth	--	--	--
Homeless	73	22	30.1
Socioeconomically Disadvantaged	473	204	43.1
Students Receiving Migrant Education Services	--	--	--
Students with Disabilities	139	50	36.0

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

*Last updated:*

**Chronic Absenteeism by Student Group**  
(School Year 2020—2021)

<b>Student Group</b>	<b>Cumulative Enrollment</b>	<b>Chronic Absenteeism Eligible Enrollment</b>	<b>Chronic Absenteeism Count</b>	<b>Chronic Absenteeism Rate</b>
All Students	3306	2619	769	29.4
Female	1666	1320	377	28.6
Male	1636	1295	392	30.3
American Indian or Alaska Native	206	109	15	30.3
Asian	2	2	2	100.0
Black or African American	184	162	58	35.8
Filipino	54	38	10	26.3
Hispanic or Latino	1526	1353	472	34.9
Native Hawaiian or Pacific Islander	19	15	9	60.0
Two or More Races	255	199	45	22.6
White	903	607	115	18.9
English Learners	316	275	102	37.1
Foster Youth	35	30	19	63.3
Homeless	158	144	71	49.3
Socioeconomically Disadvantaged	1729	1562	582	37.3
Students Receiving Migrant Education Services	0	0	0	0.0
Students with Disabilities	608	540	197	36.5

*Last updated:*

### State Priority: School Climate

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

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

#### Suspensions and Expulsions

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

Rate	School 2018-2019	School 2020-2021	District 2018-2019	District 2020-2021	State 2018-2019	State 2020-2021
Suspensions	0.03%	0.00%	3.65%	0.06%	3.47%	0.20%
Expulsions	0.00%	0.00%	0.08%	0.00%	0.08%	0.00%

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

#### Suspensions and Expulsions for School Year 2019—2020 Only

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

Rate	School 2019-2020	District 2019-2020	State 2019-2020
Suspensions	0.06%	2.24%	2.45%
Expulsions	0.03%	0.04%	0.05%

Note: The 2019-2020 suspensions and expulsions rate data are not comparable to other year data because the 2019-2020 school year is a partial school year due to the COVID-19 crisis. As such, it would be inappropriate to make any comparisons in rates of suspensions and expulsions in the 2019-2020 school year compared to other school years.

*Last updated: 2/1/22*

**Suspensions and Expulsions by Student Group  
(School Year 2020—2021)**

Student Group	Suspensions Rate	Expulsions Rate
All Students	0	0
Female	0	0
Male	0	0
Non-Binary	0	0
American Indian or Alaska Native	0	0
Asian	0	0
Black or African American	0	0
Filipino	0	0
Hispanic or Latino	0	0
Native Hawaiian or Pacific Islander	0	0
Two or More Races	0	0
White	0	0
English Learners	0	0
Foster Youth	0	0
Homeless	0	0
Socioeconomically Disadvantaged	0	0
Students Receiving Migrant Education Services	0	0
Students with Disabilities	0	0

*Last updated:*

**School Safety Plan (School Year 2021-2022)**

The safety plan is updated and approved annually. It includes disaster procedures, procedures for safe entry and exit of pupils, procedures for serious disciplinary problems, lockdown procedures, loitering law, going to and from school safely, zero tolerance policy, emergency resource information, emergency disaster kit, and emergency quick reference guide. A sexual harassment policy, child abuse reporting procedures, school dress codes and the school discipline policy are also included. Regular safety drills are conducted and recorded three times per year.

*Last updated: 2/1/22*

**D. Other SARC information**

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

**Ratio of Pupils to Academic Counselor (School Year 2020—2021)**

Title	Ratio
Pupils to Academic Counselor*	538.1

Last updated: 1/1/00

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

**Student Support Services Staff (School Year 2020—2021)**

Title	Number of FTE* Assigned to School
Counselor (Academic, Social/Behavioral or Career Development)	3.20
Library Media Teacher (Librarian)	0.00
Library Media Services Staff (Paraprofessional)	0.00
Psychologist	0.00
Social Worker	0.00
Nurse	1.00
Speech/Language/Hearing Specialist	0.00
Resource Specialist (non-teaching)	0.00
Other	19.40

Last updated: 1/1/00

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

**Expenditures Per Pupil and School Site Teacher Salaries (Fiscal Year 2019—2020)**

Level	Total Expenditures Per Pupil	Expenditures Per Pupil (Restricted)	Expenditures Per Pupil (Unrestricted)	Average Teacher Salary
School Site	\$14347.00	\$742.00	\$13605.00	--
District	N/A	N/A	--	\$86877.00
Percent Difference – School Site and District	N/A	N/A	--	--
State	N/A	N/A	\$8443.83	\$84665.00
Percent Difference – School Site and State	N/A	N/A	--	--

Last updated: 2/1/22

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

**Types of Services Funded (Fiscal Year 2020–2021)**

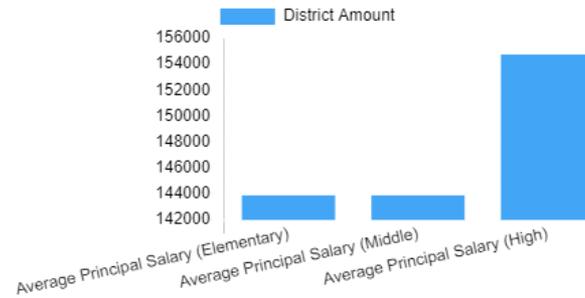
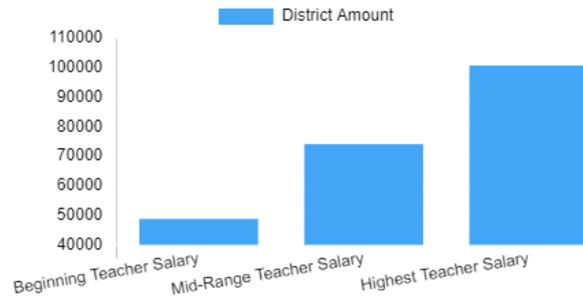
As a 501c3 non-profit corporation, Student Success Programs, Inc. has full authority and discretion in the management of all its fiscal matters. The latitude to determine the use of funds is accompanied by an obligation to remain revenue neutral and to submit an audited financial report annually to the District. More than half of the funds the school receives go to certificated instructors who work directly with students. Funds are also used for purchasing up-to-date instructional materials and technology.

*Last updated: 2/1/22*

**Teacher and Administrative Salaries (Fiscal Year 2019—2020)**

Category	District Amount	State Average For Districts In Same Category
Beginning Teacher Salary	\$48792.00	\$50897.00
Mid-Range Teacher Salary	\$74140.00	\$78461.00
Highest Teacher Salary	\$100772.00	\$104322.00
Average Principal Salary (Elementary)	\$139968.00	\$131863.00
Average Principal Salary (Middle)	\$143902.00	\$137086.00
Average Principal Salary (High)	\$154753.00	--
Superintendent Salary	\$290907.00	\$297037.00
Percent of Budget for Teacher Salaries	34.00%	32.00%
Percent of Budget for Administrative Salaries	5.00%	5.00%

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



*Last updated:*

**Advanced Placement (AP) Courses (School Year 2020—2021)****Percent of Students in AP Courses** 2.00%

Subject	Number of AP Courses Offered*
Computer Science	0
English	9
Fine and Performing Arts	0
Foreign Language	0
Mathematics	2
Science	1
Social Science	20
Total AP Courses Offered*	32.00%

Last updated: 2/1/22

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

**Professional Development**

Measure	2019-2020	2020-2021	2021-2022
Number of school days dedicated to Staff Development and Continuous Improvement	14	14	14

# Comprehensive Safety Plan



Student  
Success  
Programs

*SY 2021-2022*

The Charter School of  
**SAN DIEGO**

**Audeo**  
Charter School

# QUICK GLANCE REFERENCE

## Notification System

**FIRE Notification Method is—Series of short beeps followed by verbal instructions**

**EARTHQUAKE DRILL Notification Method is—Continuous long beep followed by verbal instructions**

**LOCKDOWN Notification Method is—Lights being turned off, followed by verbal instructions**

**SHELTER-IN-PLACE Notification Method is—3 short beeps, 3 long beeps followed by verbal instructions**

**ALL-CLEAR Notification Method is—Series of long beeps followed by verbal instructions**

*(Notification systems vary at each location. Minimum requirements cover fire, earthquake, lockdown, shelter-in-place, and all-clear to return)*

## Incident Command Team Personnel—Major Assignments Only

Primary (Insert Names)	Position	Alternate (Insert Names)
Mary Bixby	Incident Commander	Tim Tuter
Tim Tuter	Operations Chief	Lynne Alipio
Angela Neri	Planning & Intelligence Chief	Eleanor Pe
Tim Tuter	Logistics Chief	Angela Neri
Lynne Alipio	Finance & Administration Chief	Mary Bixby

*(SUBORDINATE ASSIGNMENTS CAN BE FOUND ON SECTION FOUR)*

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# SECTION ONE

## Executive Summary

**The purpose of this plan is to outline the basic organization and procedures utilizing the Standardized Emergency Management System (SEMS) and the National Incident Management System (NIMS) for responding to an emergency affecting any location.**

**An “Incident Commander” (and alternate) is assigned to be the point of contact for this plan. During emergencies, the Incident Commander is the point of coordination for all operations. An Incident Command Team is in place to address key issues during emergency operations. The team works as directed by the Incident Commander. Each team member assignment can be found in Section Four of this plan, which identifies roles, responsibilities and duties.**

**The Incident Commander and the Incident Command Team are assigned to maintain and implement their Emergency Plan. The Safety Coordinator will assist with emergency preparedness, disaster planning, and will be responsible for updating the underlying Emergency Plan Template. As a component of the Comprehensive Safe Schools Plan document, the Safety Coordinator will review this emergency plan on an annual basis to determine if the Emergency Plan Template is compliant with Federal, State, and local laws.**

**The Incident Commander will coordinate training for all new staff (paid and volunteer) assigned to this RC. The Incident Commander, coordinating with the Safety Coordinator, will conduct scheduled exercises to provide staff with an opportunity to practice the emergency procedures outlined in this plan.**

**This format allows staff to understand basic roles and responsibilities regardless of where in the school they may be working.**

**It is imperative all staff review this plan at least twice a year to ensure a basic understanding of their role and responsibility in an emergency. It is unlikely that anyone will have the time when an emergency occurs to review this entire plan, thus understanding and practice is necessary to be prepared. The proactive actions of individuals during an emergency may very well save another’s life.**

# SECTION TWO

## Facility Information and Street/Arial Maps

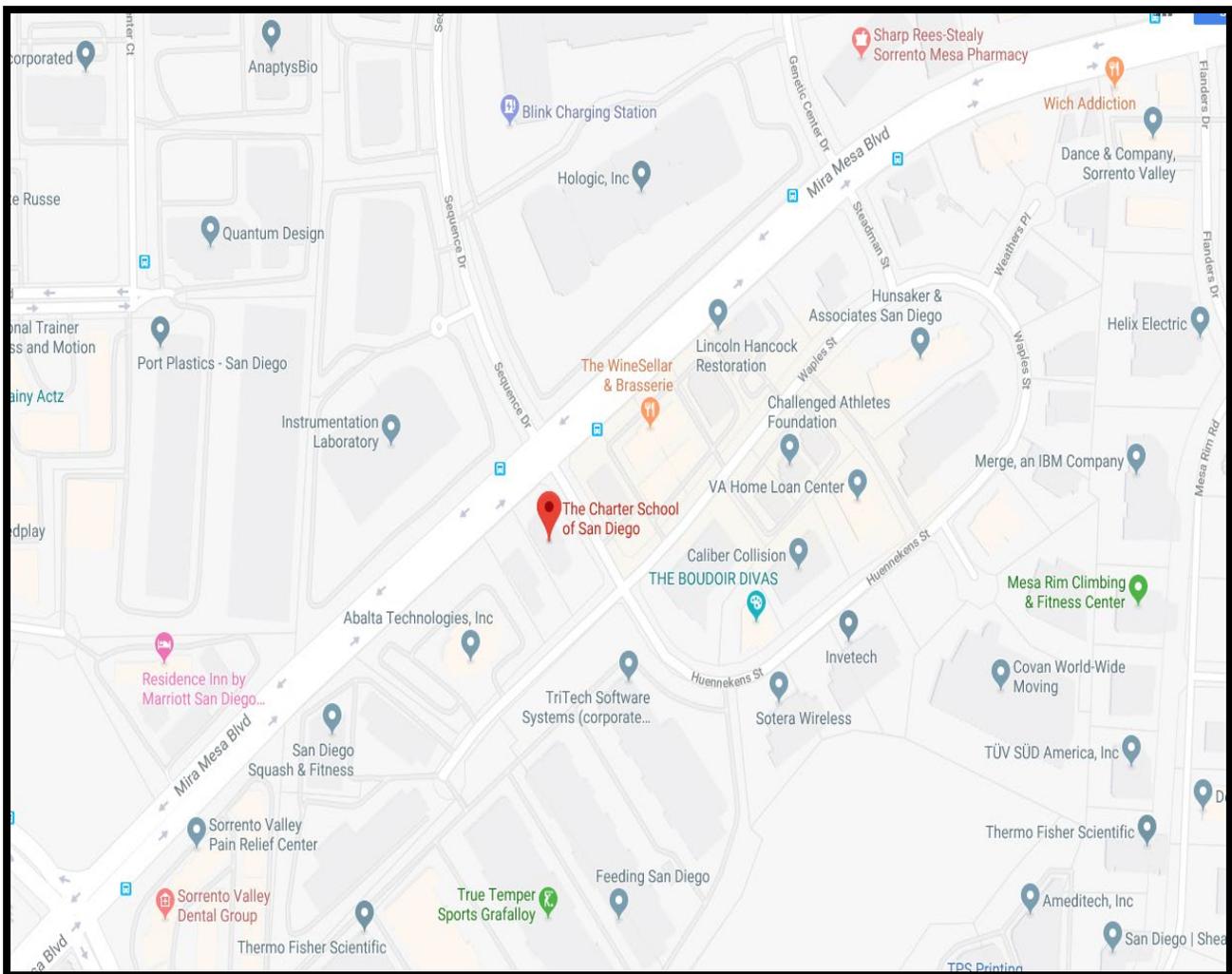
### Sorrento Mesa Corporate Office – CSSD

**Office Address: 10170 Huennekens Street, San Diego, CA 92121**

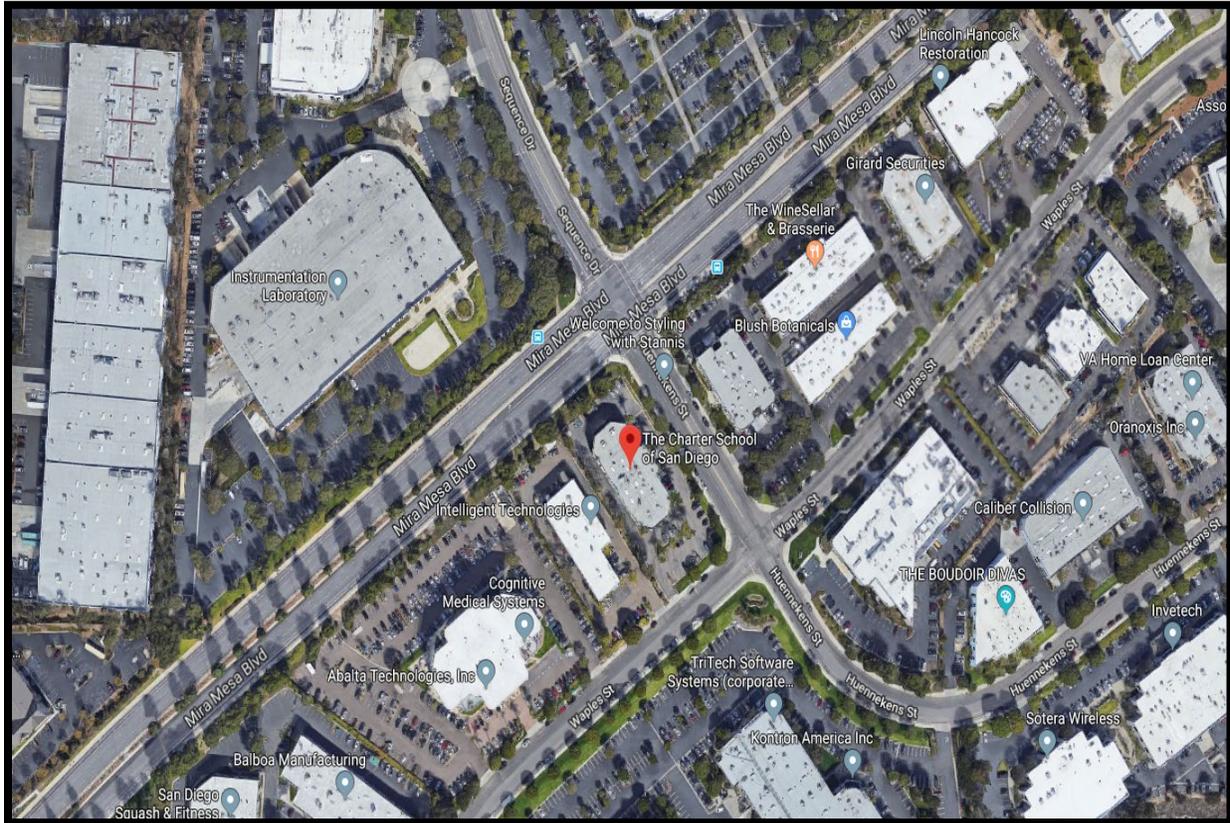
**Office Public Phone Number: 858-678-2020**

**Office Direct Phone Number: 858-678-2044 (Mary Bixby)**

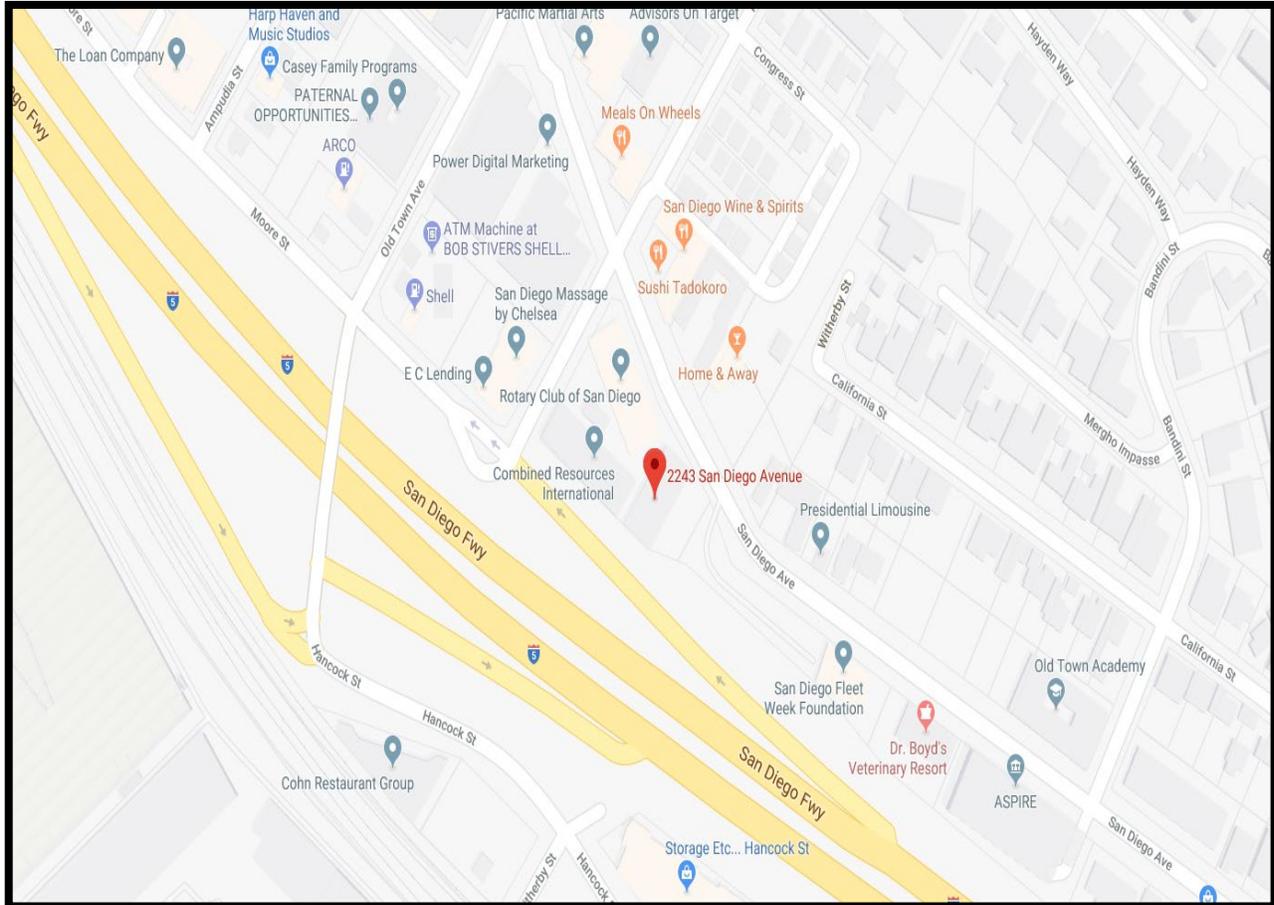
**Fax Numbers: 858-552-6660, 858-552-6666, 858-552-9010**



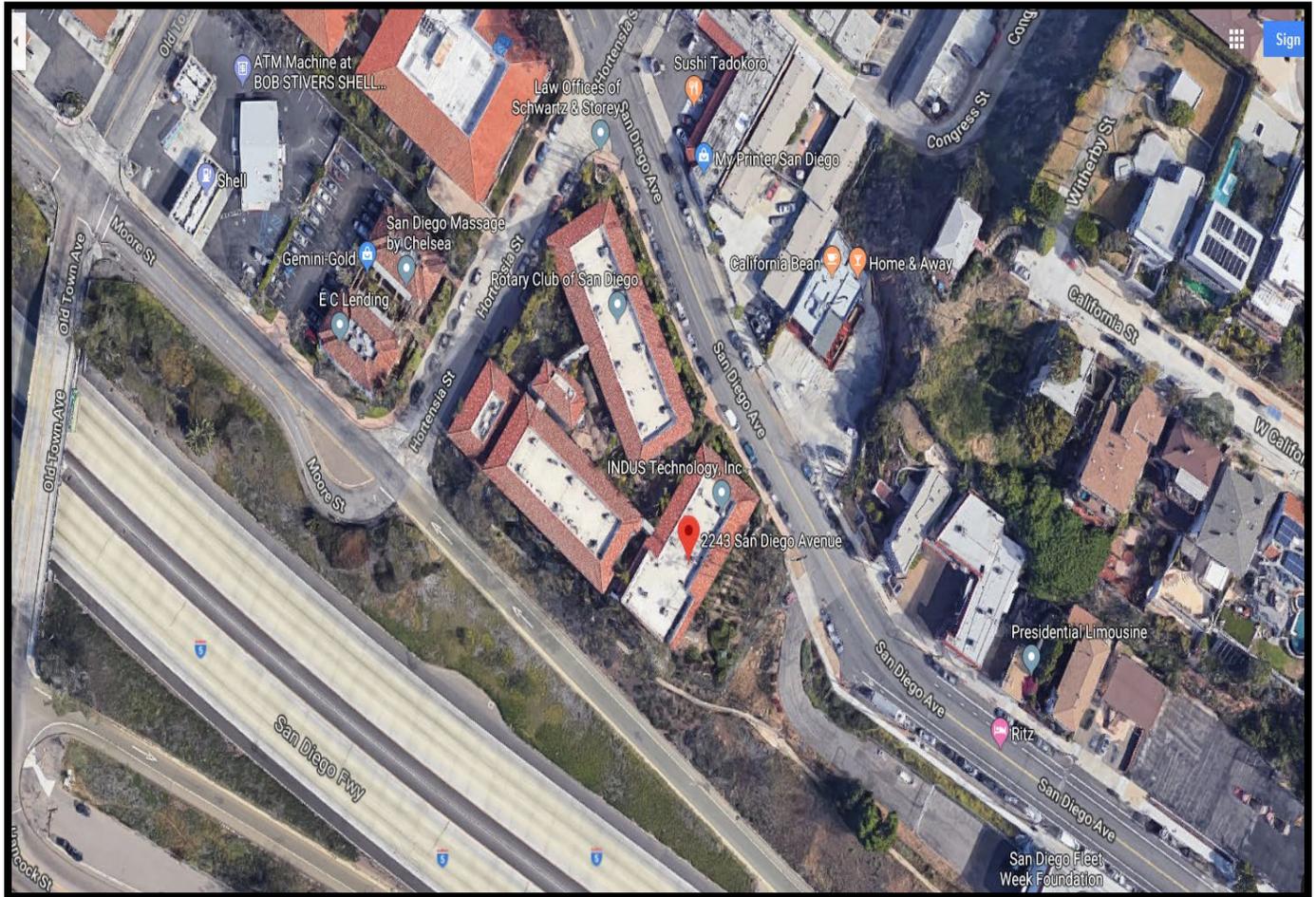
### Sorrento Mesa Aerial Map



**Old Town Service Center—CSSD**  
**Office Address: 2243 San Diego Avenue, Suite 115, San Diego, CA 92110**  
**Office Public Phone Number: 858-678-2020**  
**Office Fax Number: 619-299-6127**



### Old Town Aerial Map

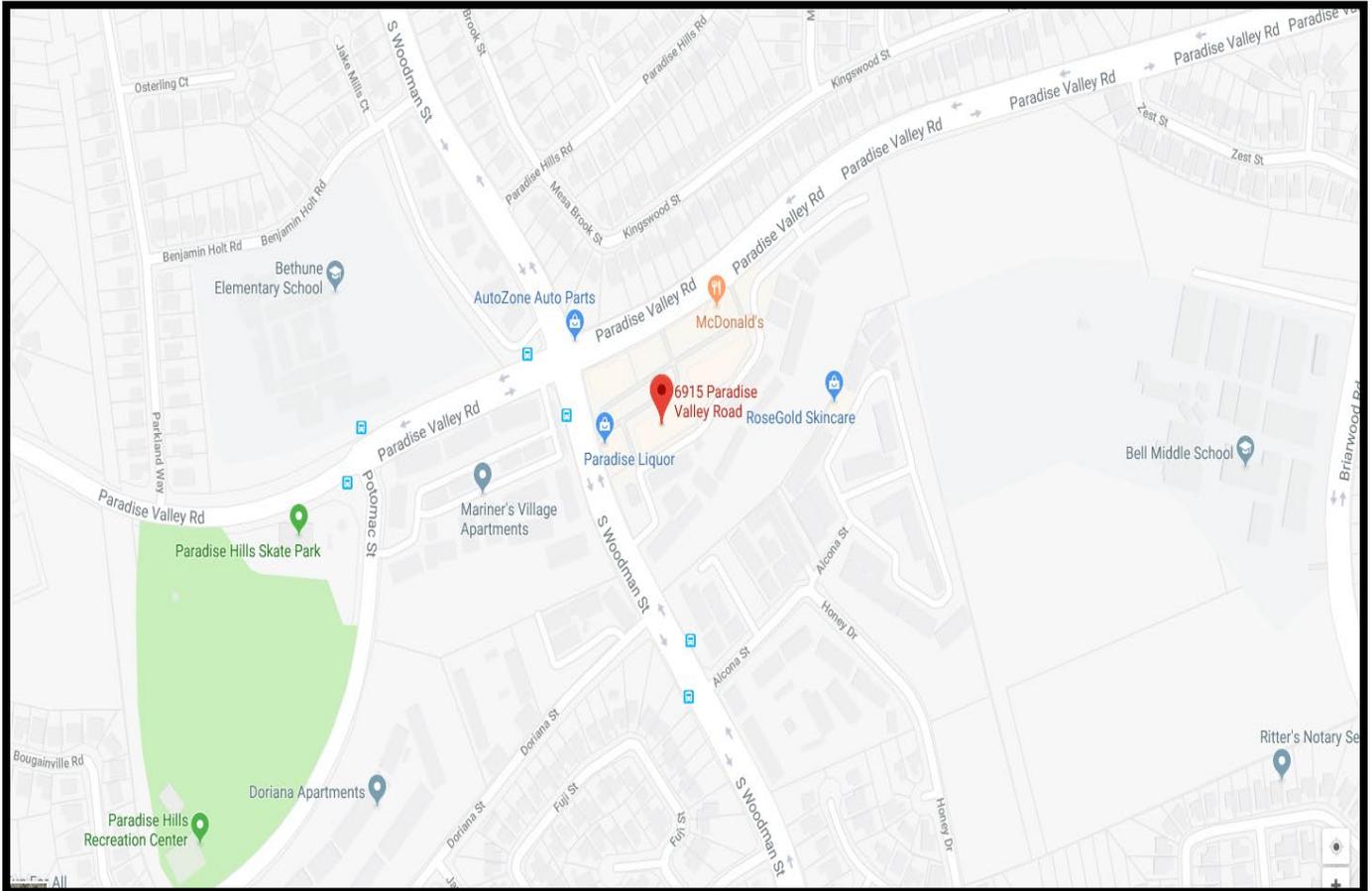


**Paradise Hills Annex Office—CSSD  
Next to Little Caesar's Pizza**

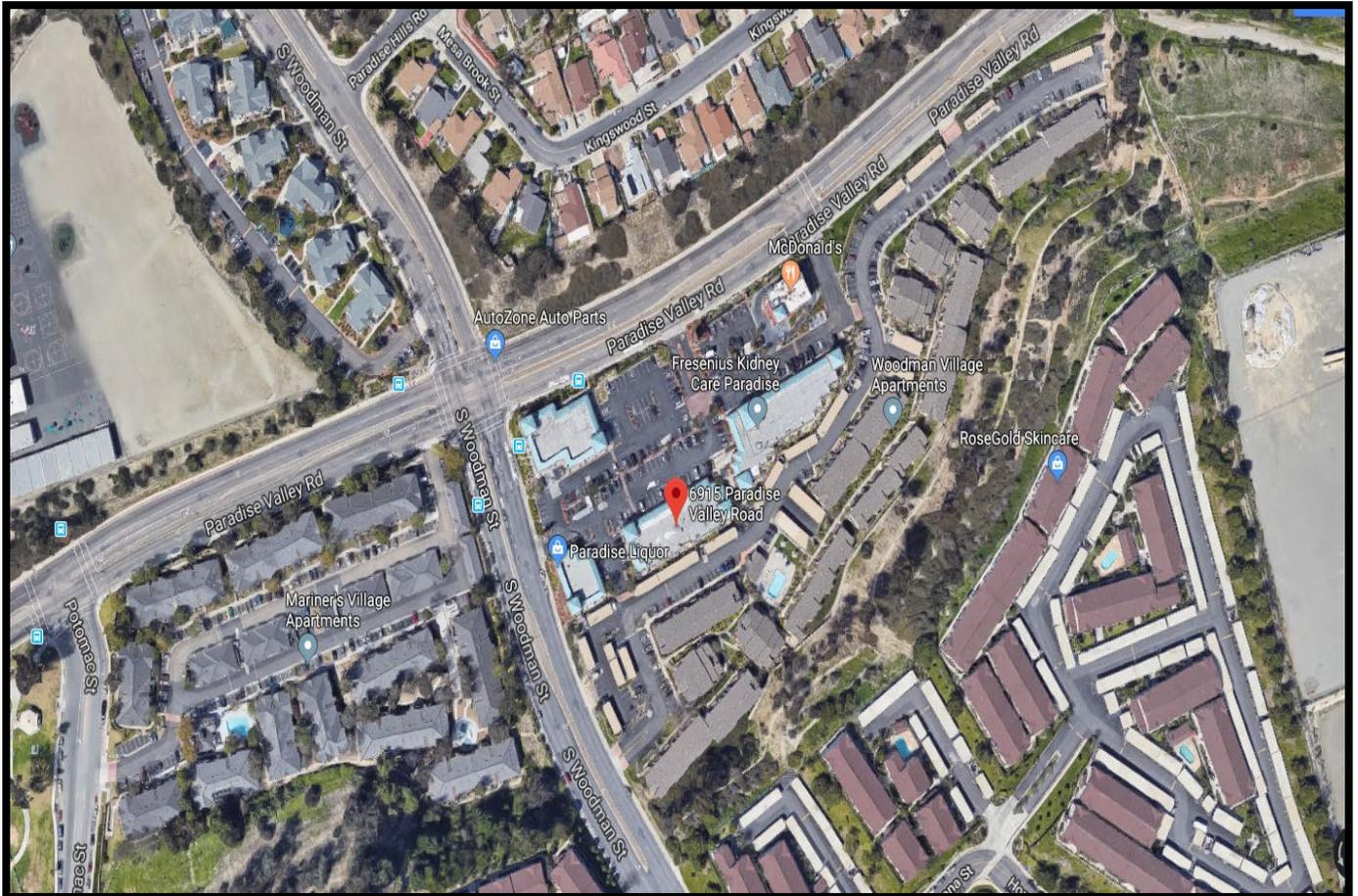
**Office Address: 6915 Paradise Valley Road, Unit 1, San Diego, CA 92139**

**Office Public Phone Number: 858-678-2020**

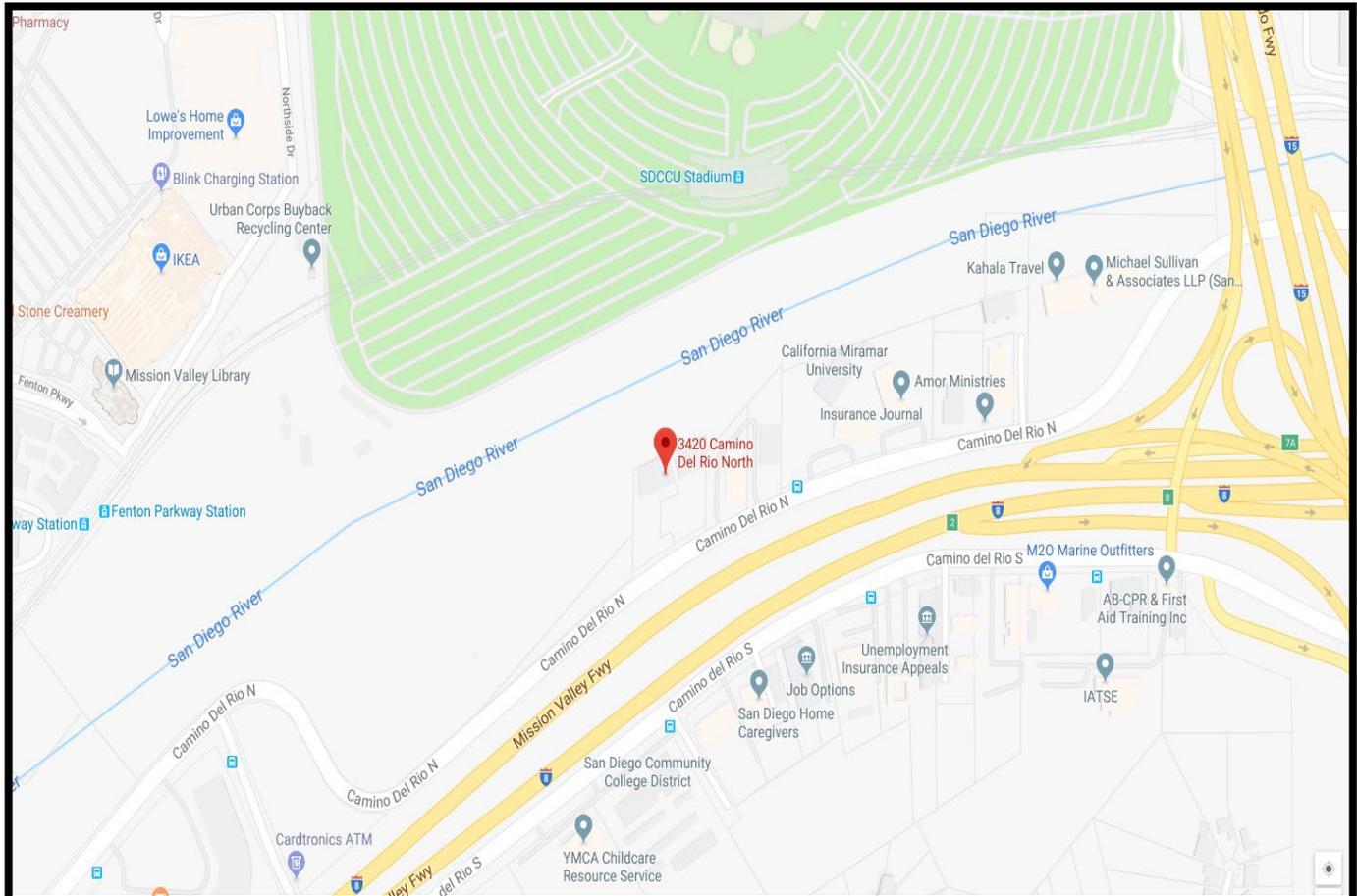
**Office Fax Number: 619-472-6641**



### Paradise Hills Annex Office Aerial Map



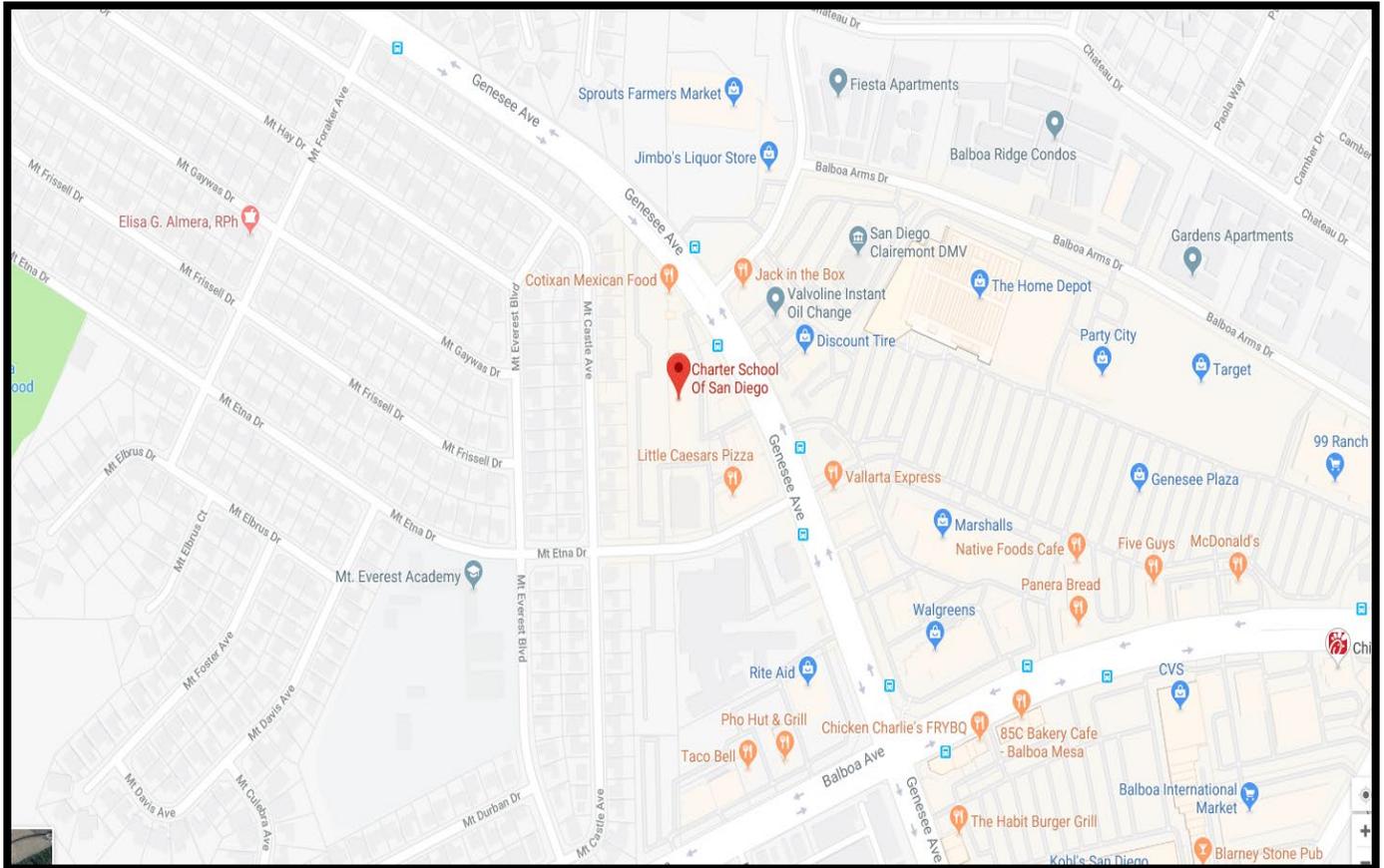
**Mission Valley-West Office Building-- AUDEO**  
**Office Address: 3420 Camino Del Rio North, San Diego, CA 92108**  
***Behind SDCCU Stadium (Formerly Qualcomm)***  
**Office Public Phone Number: 858-678-2050**  
**Office Fax Number: 619-280-8033**



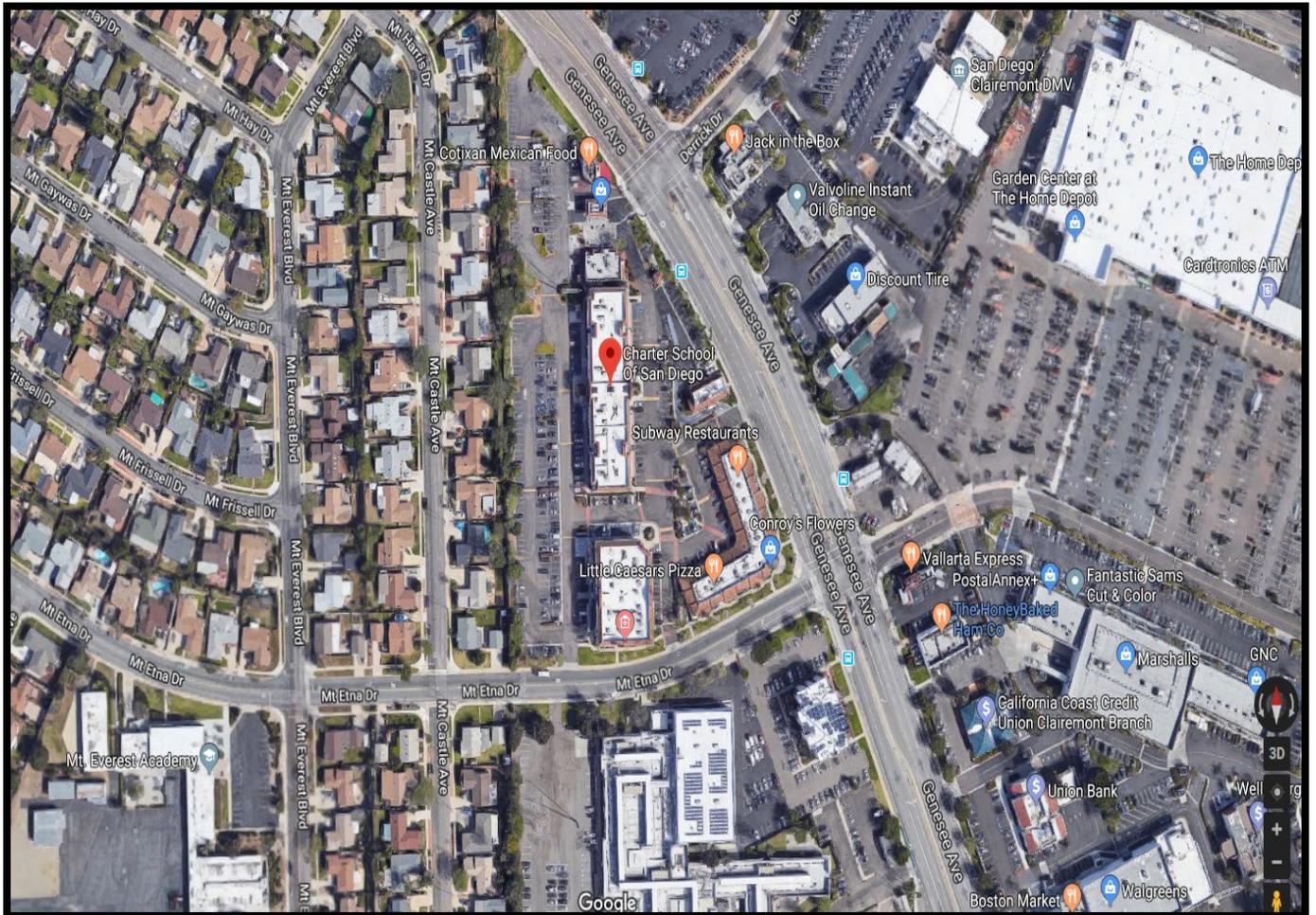
### Mission Valley-West Office Building Aerial Map



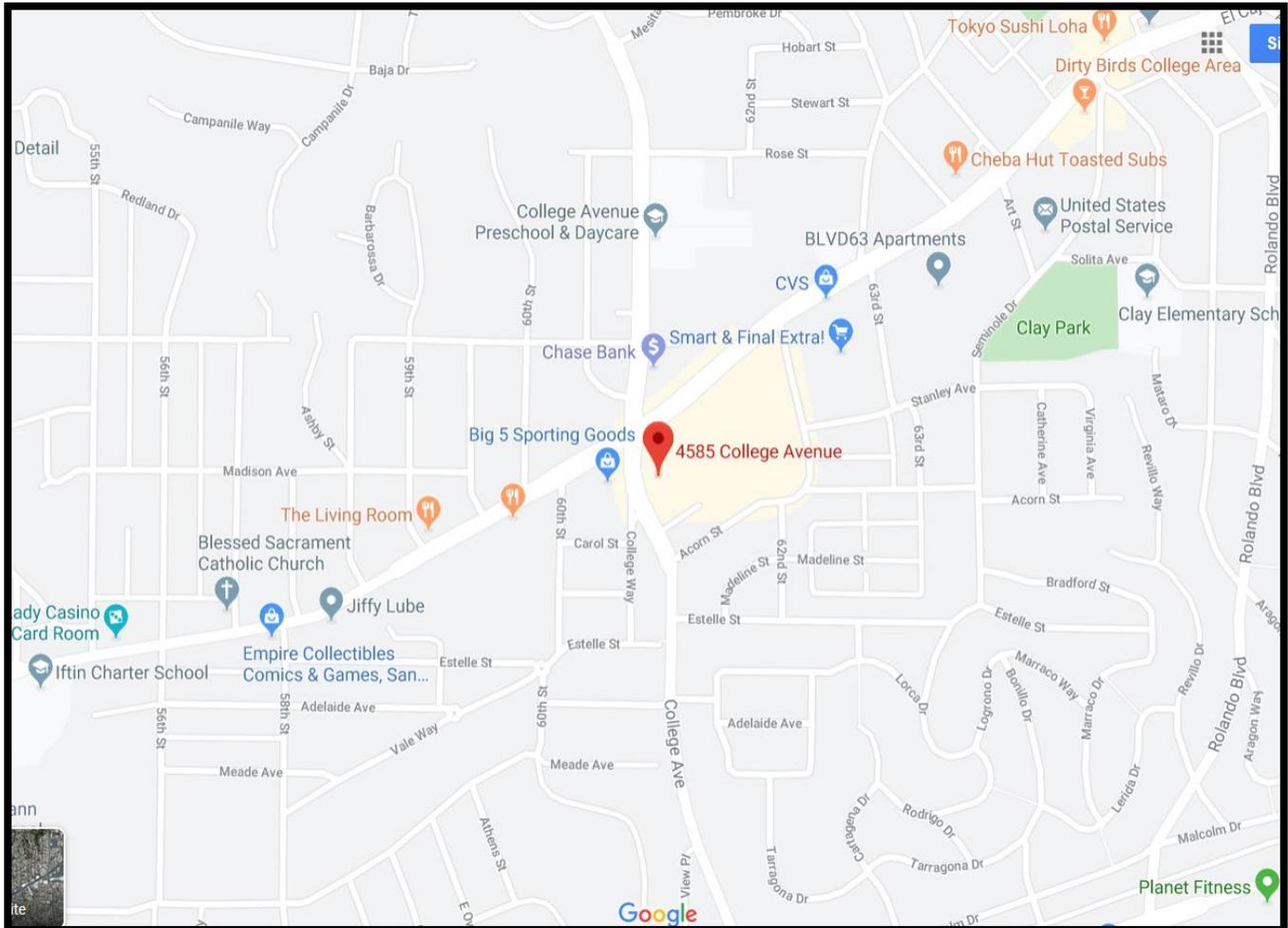
**Clairemont Resource Center (RC) - CSSD**  
**RC Address: 4340 Genesee Ave., Ste. 109, San Diego, CA 92117**  
***Same strip mall as El Pollo Loco***  
**RC Public Phone Number: 858-678-2020**  
**RC Fax Number: 858-552-6660**



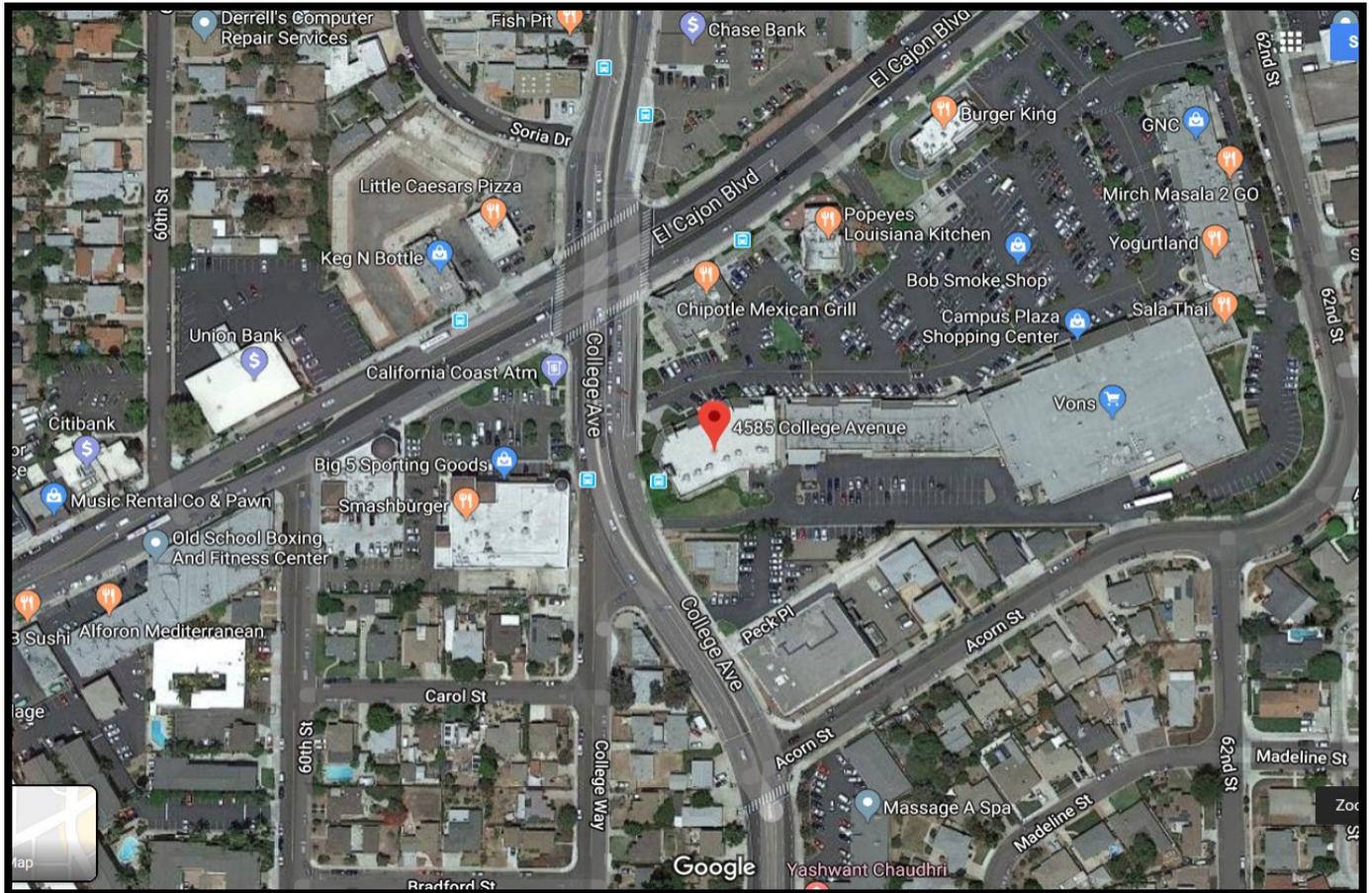
### Clairemont Aerial Map



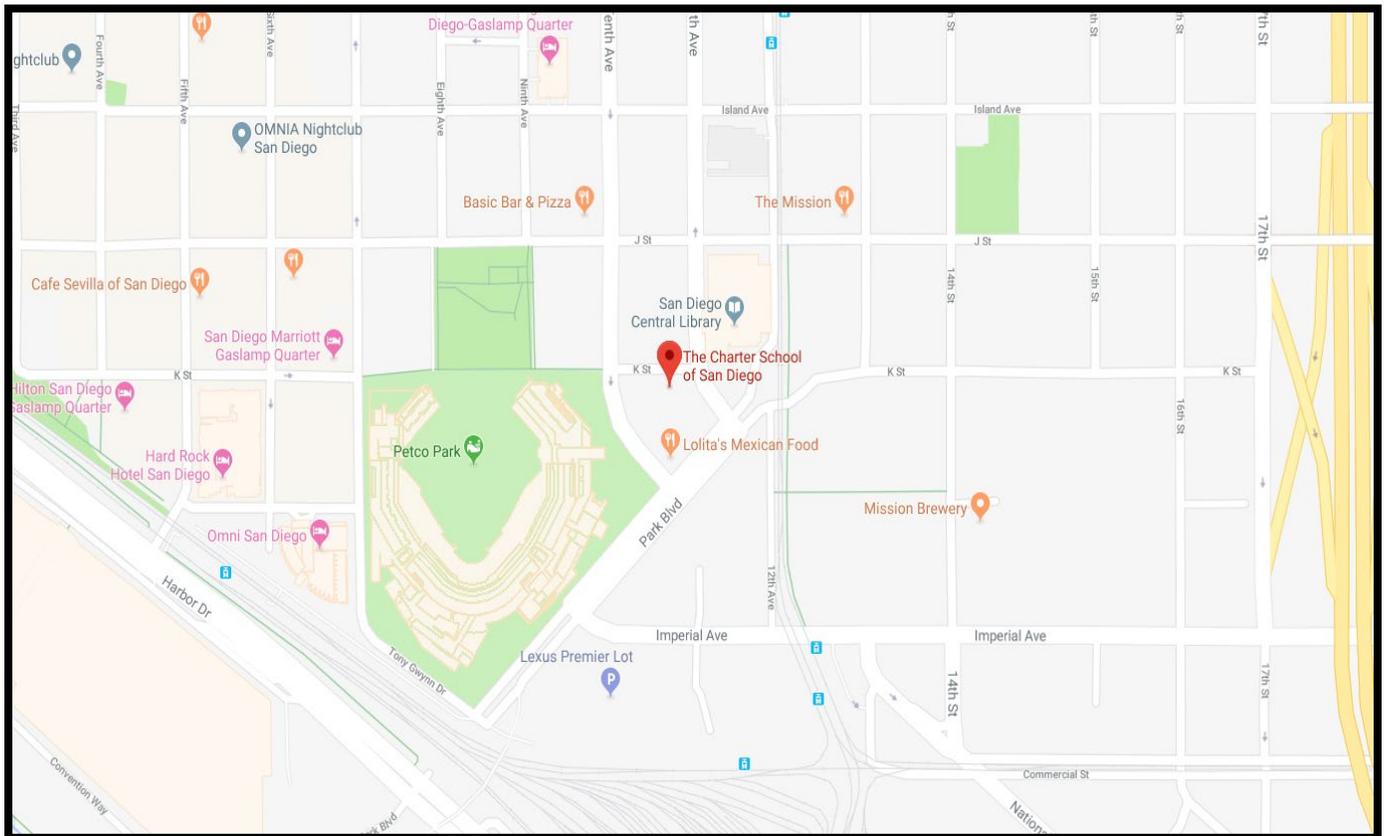
**College Avenue Resource Center (RC) - CSSD**  
**RC Address: 4585 College Ave., Suites C1 & C2, San Diego, CA 92115**  
**Near VONS Supermarket**  
**RC Public Phone Number: 858-678-2020**  
**RC Fax Number: 858-552-6660**



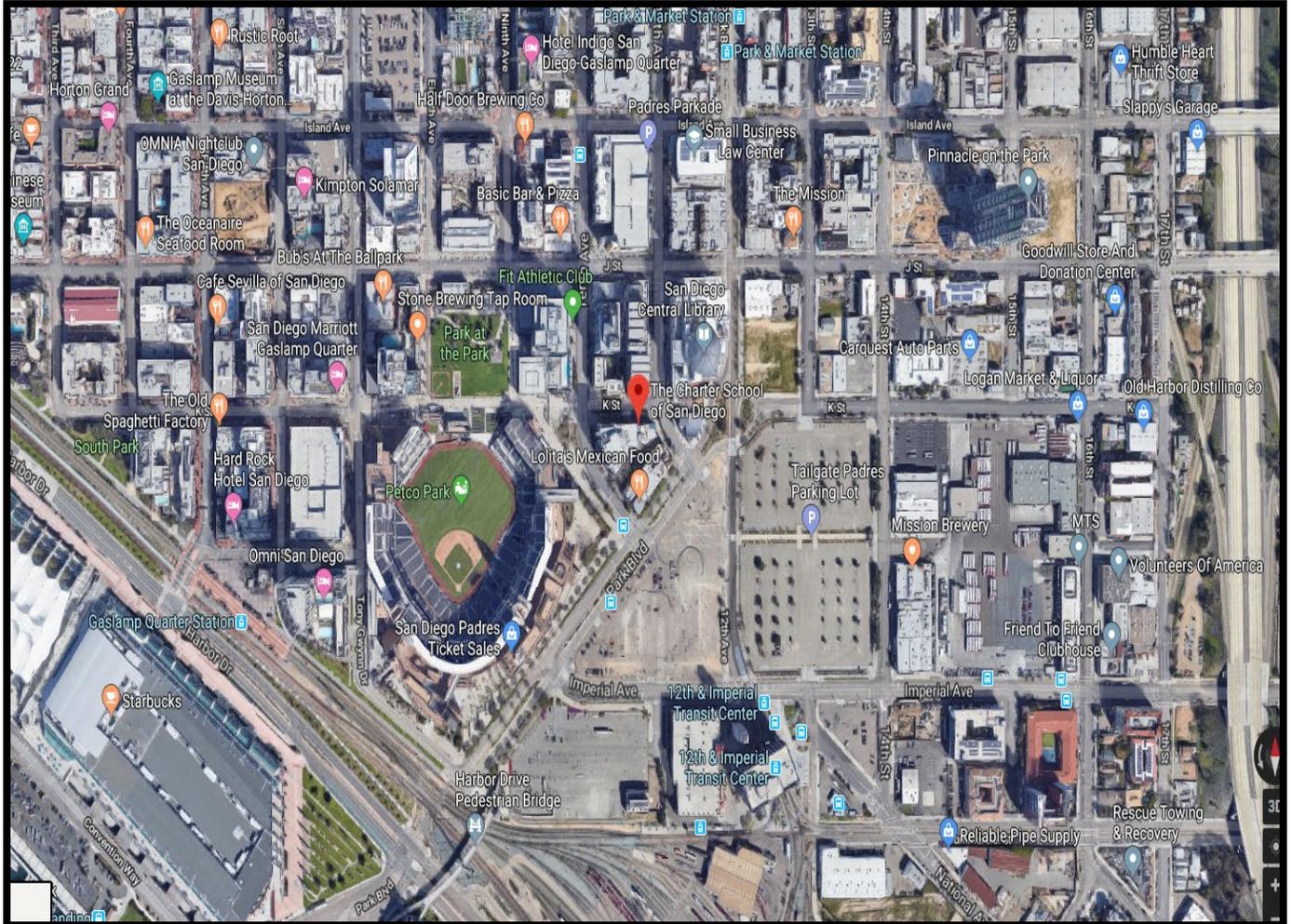
### College Avenue Aerial Map



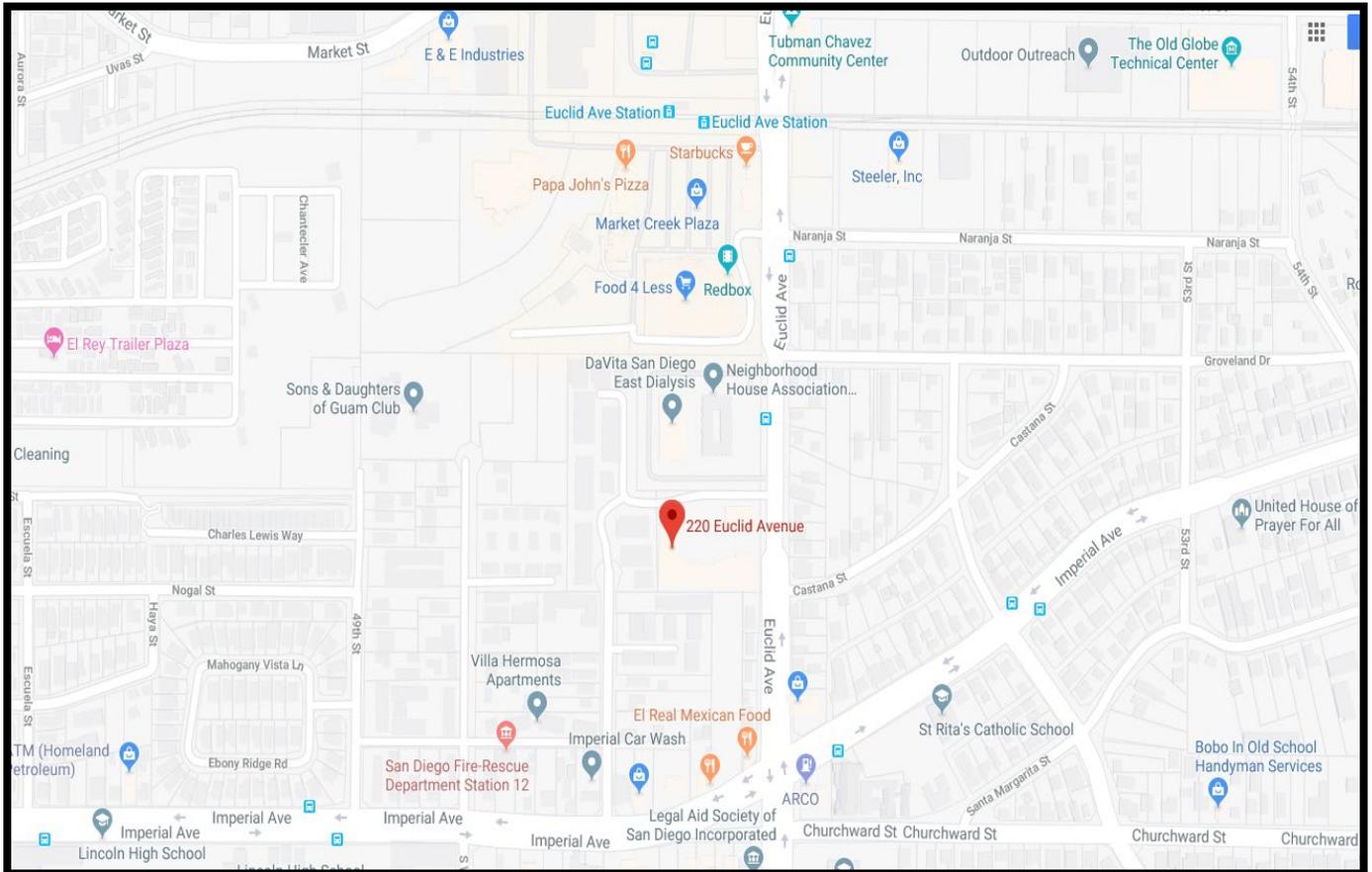
**Downtown Resource Center (RC) - CSSD**  
**RC Address: 1095 K St., Ste. A, San Diego, CA 92101**  
***In downtown San Diego, east of Petco Park***  
**RC Public Phone Number: 858-678-2020**  
**RC Fax Number: 858-552-6660**



### Downtown Aerial Map



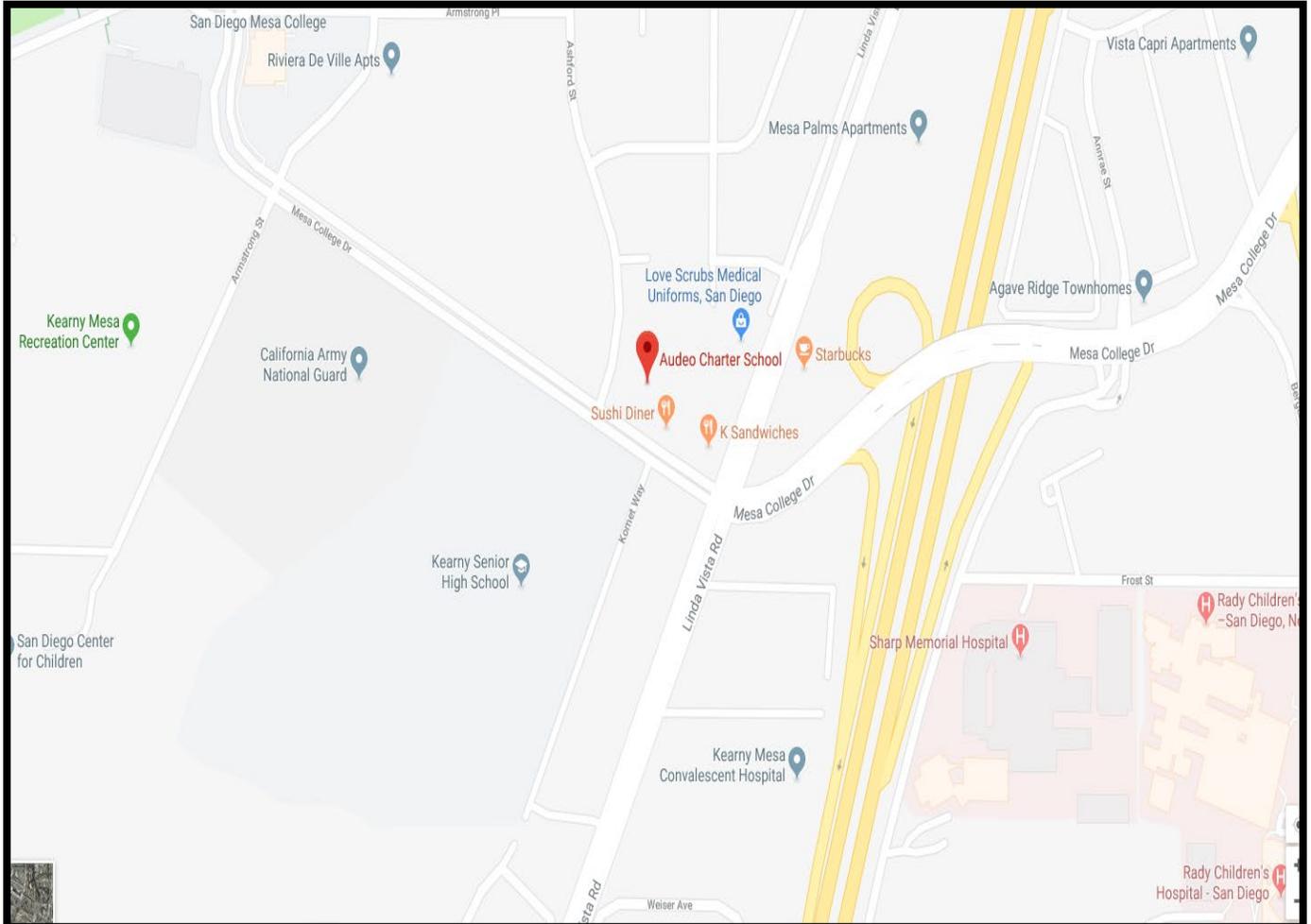
**Euclid Resource Center (RC) - CSSD**  
**RC Address: 220 Euclid Ave., Suite 70, San Diego, CA 92114**  
***Near intersection of Imperial Avenue and Euclid Avenue***  
**RC Public Phone Number: 858-678-2020**  
**RC Fax Number: 858-552-6660**



### Euclid Aerial Map



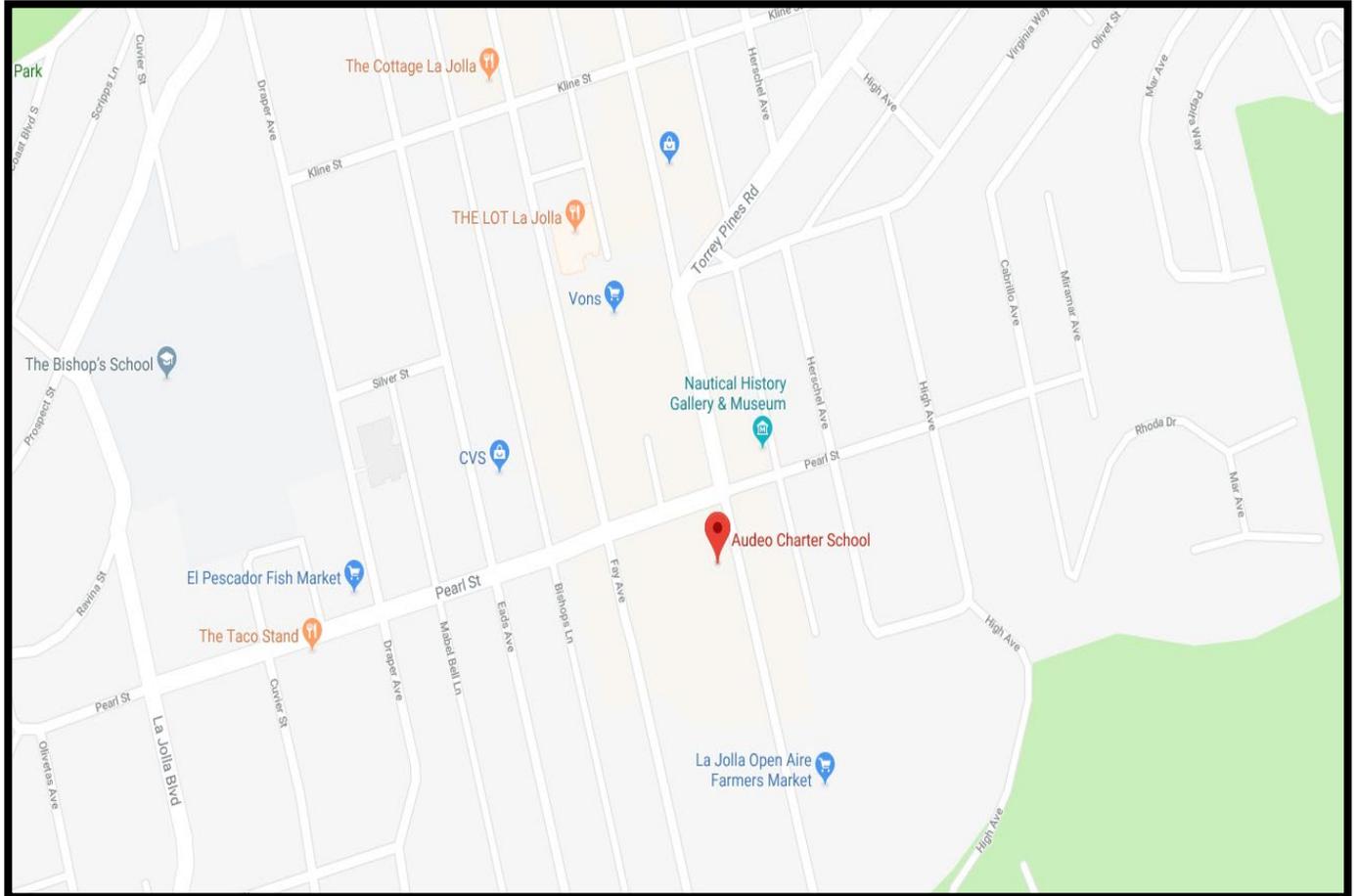
**Kearny Mesa Resource Center (RC) - Audeo**  
**RC Address: 7520 Mesa College Drive, San Diego, CA 92111**  
**RC Public Phone Number: 858-678-2050**  
**RC Fax Number: 619-280-8033**



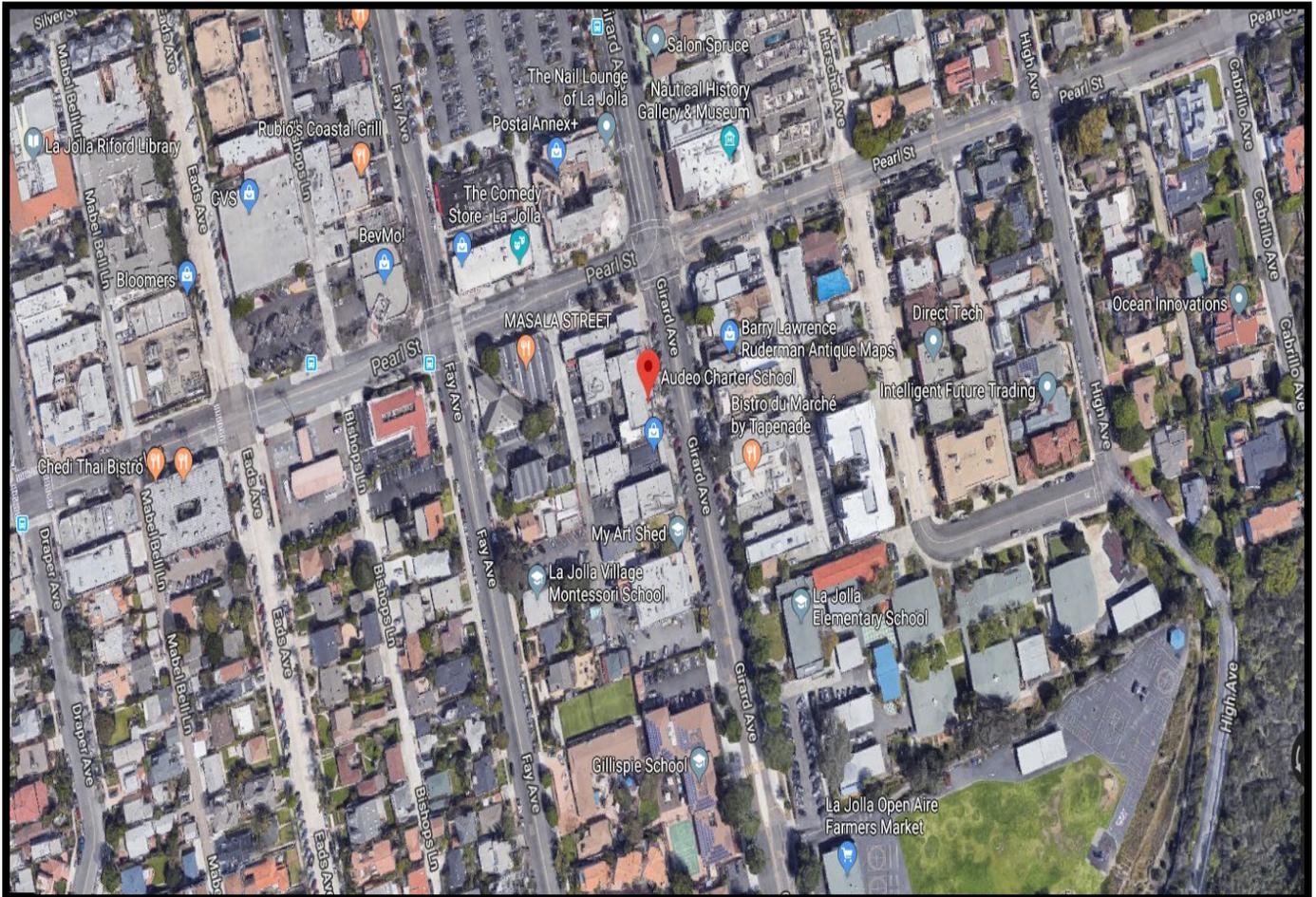
### Kearny Mesa Aerial Map



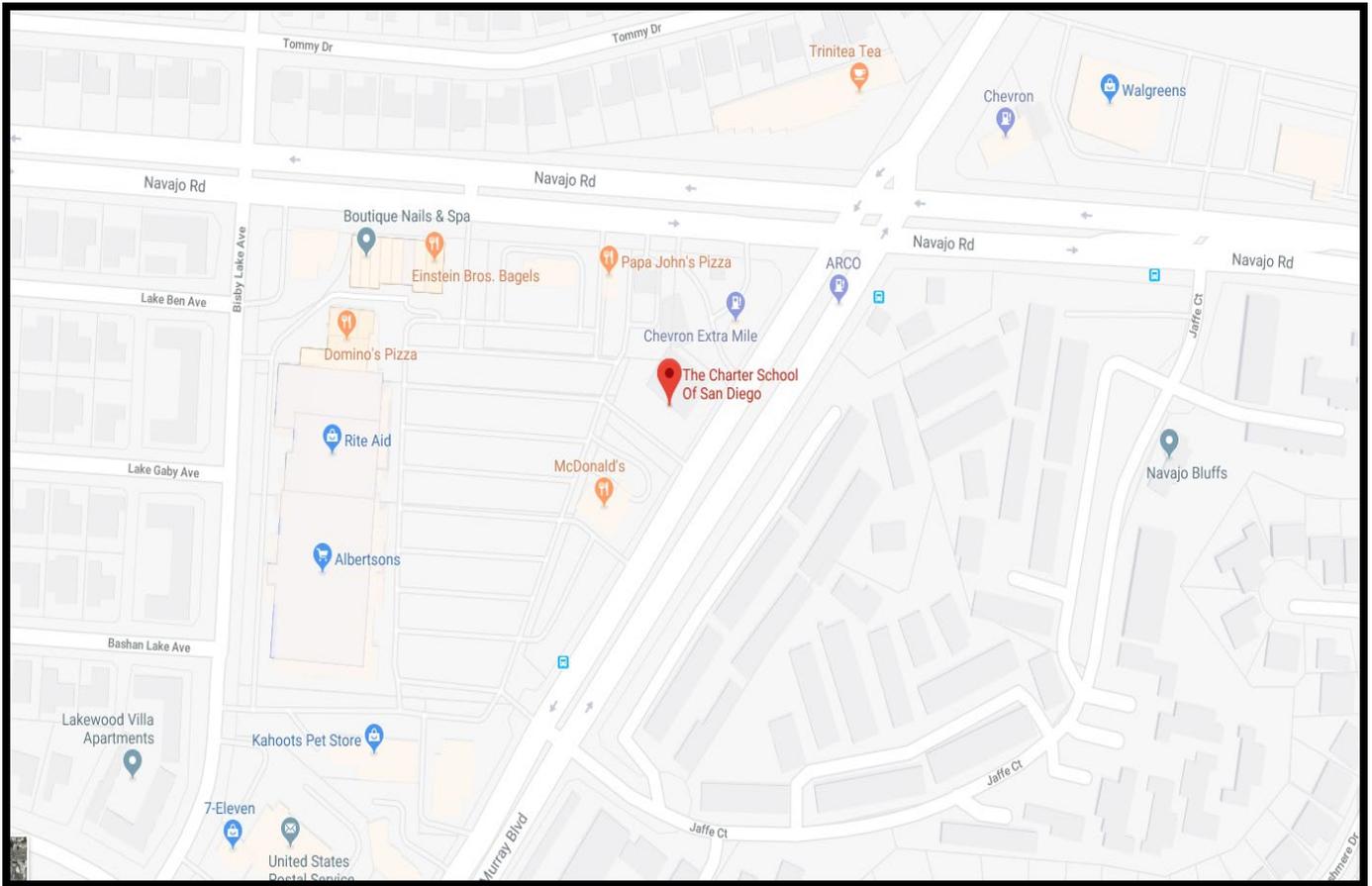
**La Jolla Resource Center (RC) - Audeo**  
**RC Address: 7458 (7456) Girard Avenue, La Jolla, CA 92037**  
**RC Public Phone Number: 858-678-2050**  
**RC Fax Number: 619-280-8033**



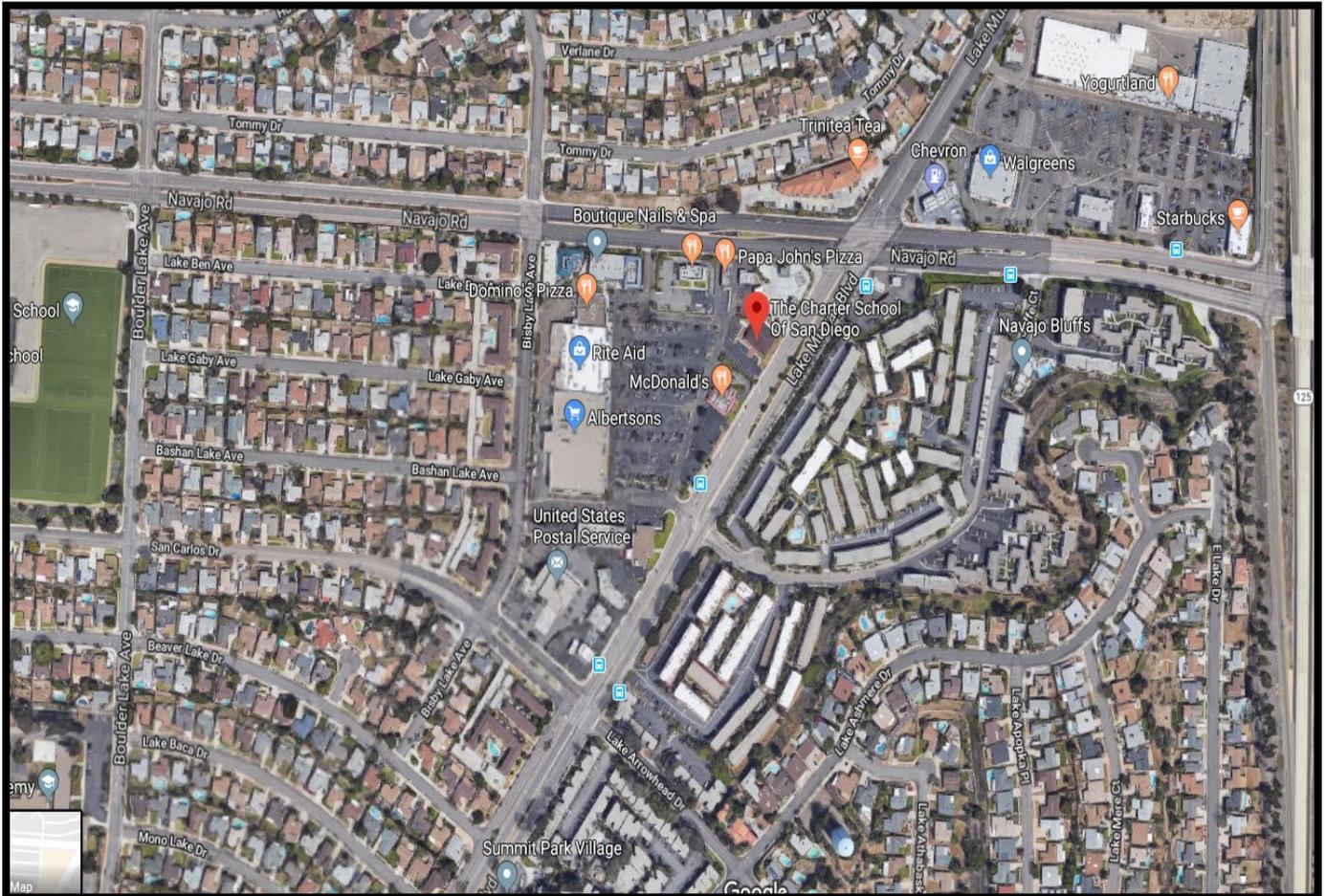
### La Jolla-Audeo Aerial Map



**Lake Murray Resource Center (RC) - CSSD**  
**RC Address: 8776 Lake Murray Blvd., San Diego, CA 92119**  
***Located on Lake Murray Blvd. and Navajo Road***  
**RC Public Phone Number: 858-678-2020**  
**RC Fax Number: 858-552-6660**

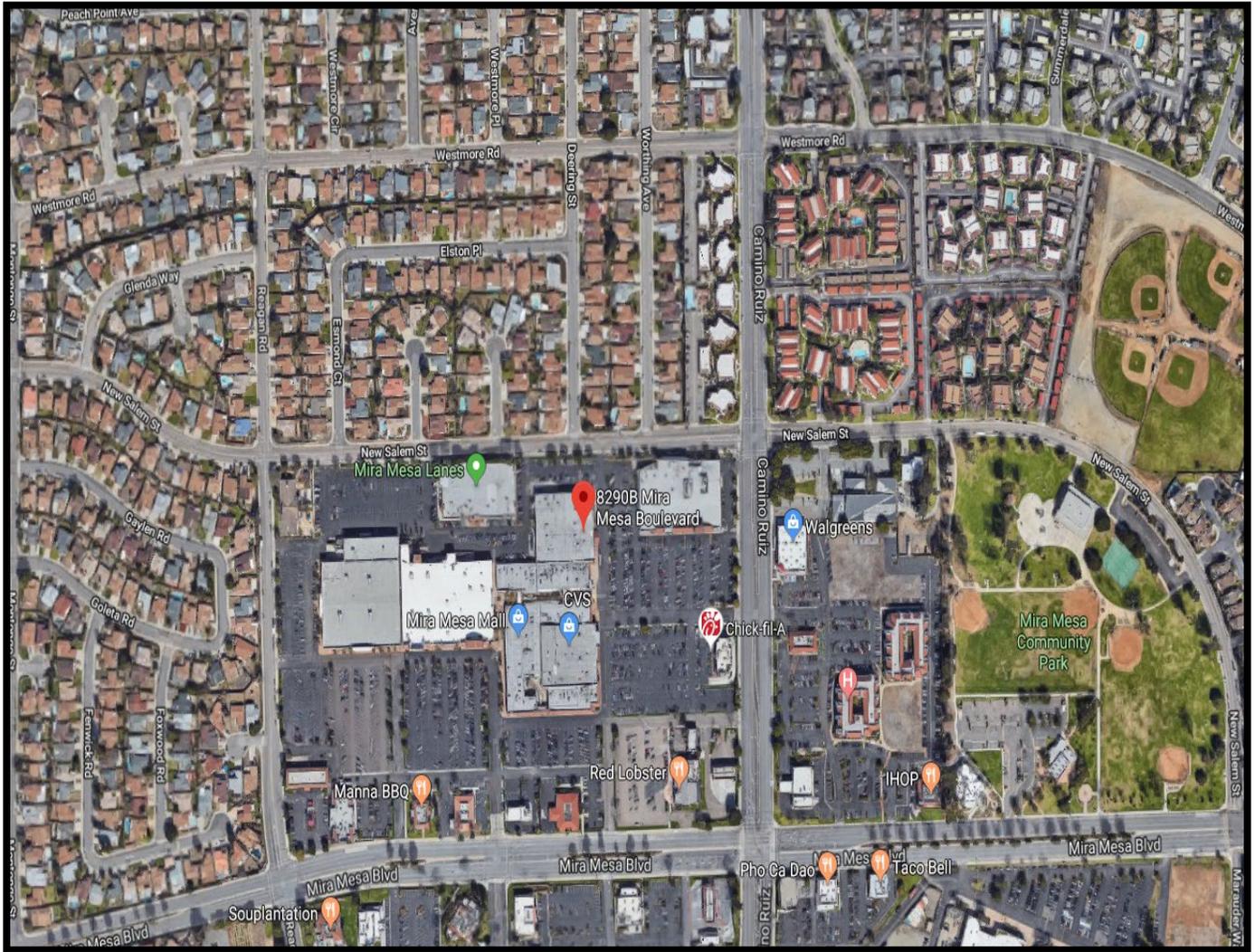


### Lake Murray- CSSD Aerial Map

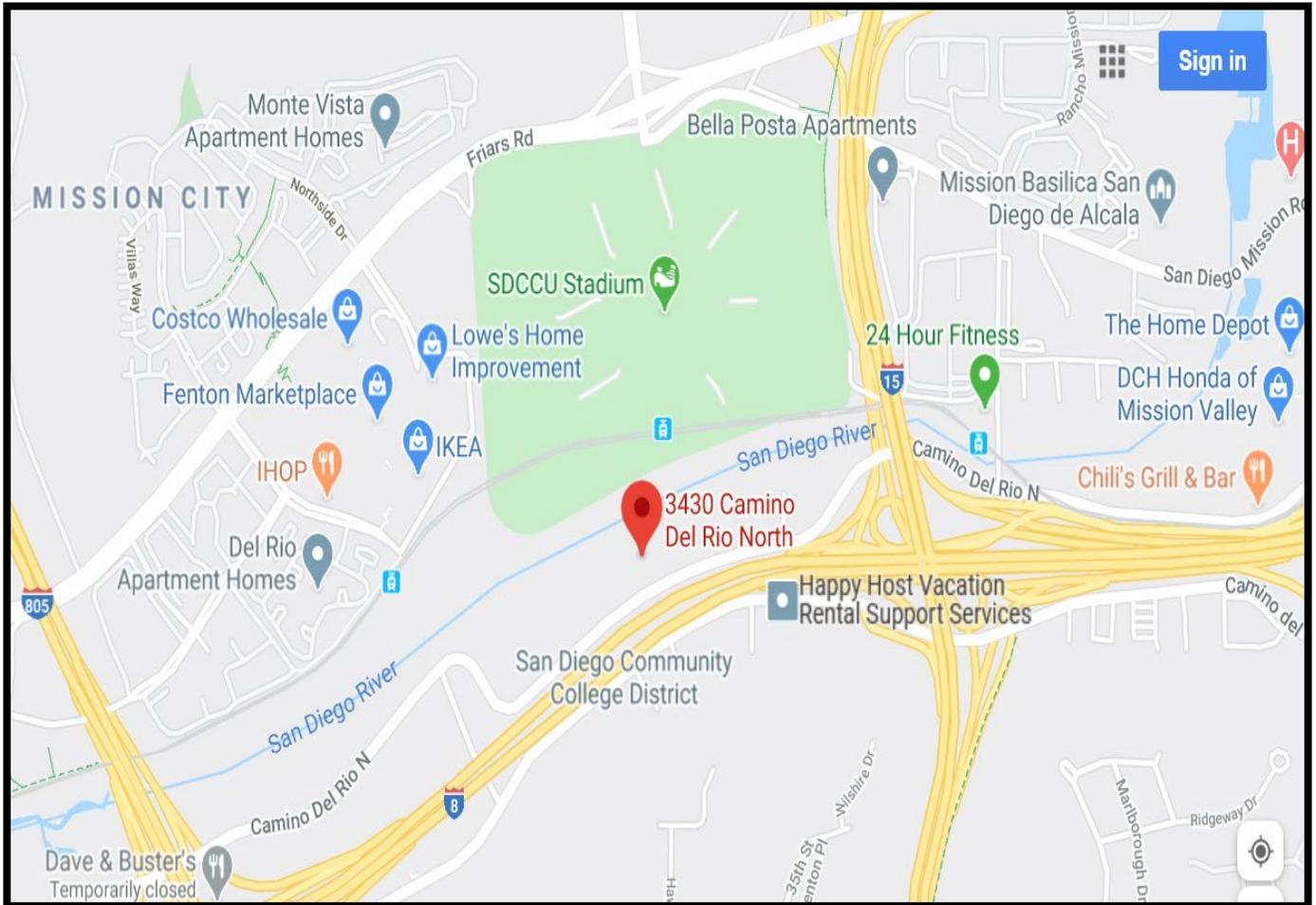




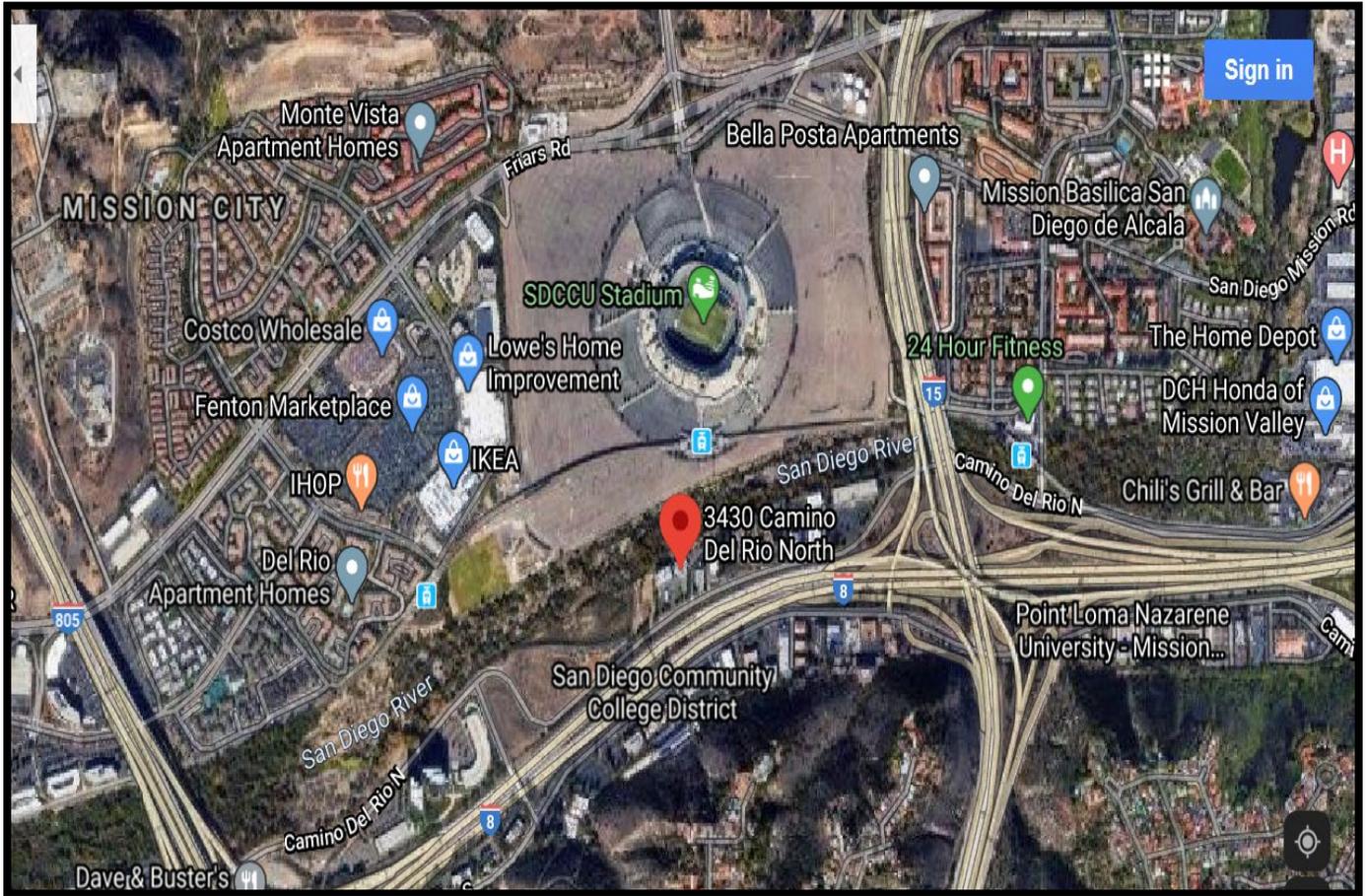
### Mira Mesa Aerial Map



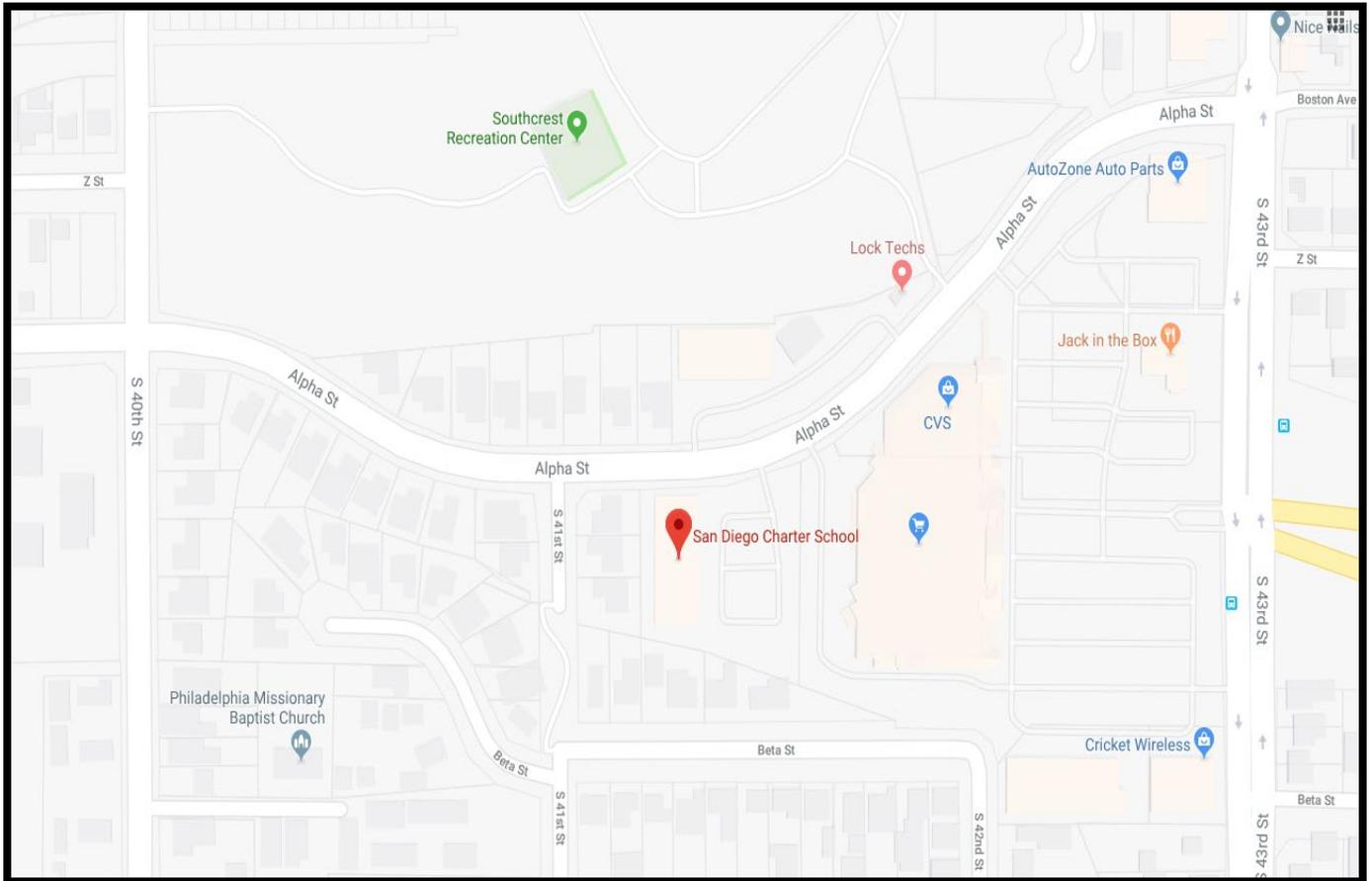
**Mission Valley Resource Center (RC) - Audeo**  
**RC Address: 3430 Camino Del Rio North, San Diego, CA 92108**  
***At the back of SDCCU Stadium, I-8 side***  
**RC Public Phone Number: 858-678-2050**  
**RC Fax Number: 619-280-8033**



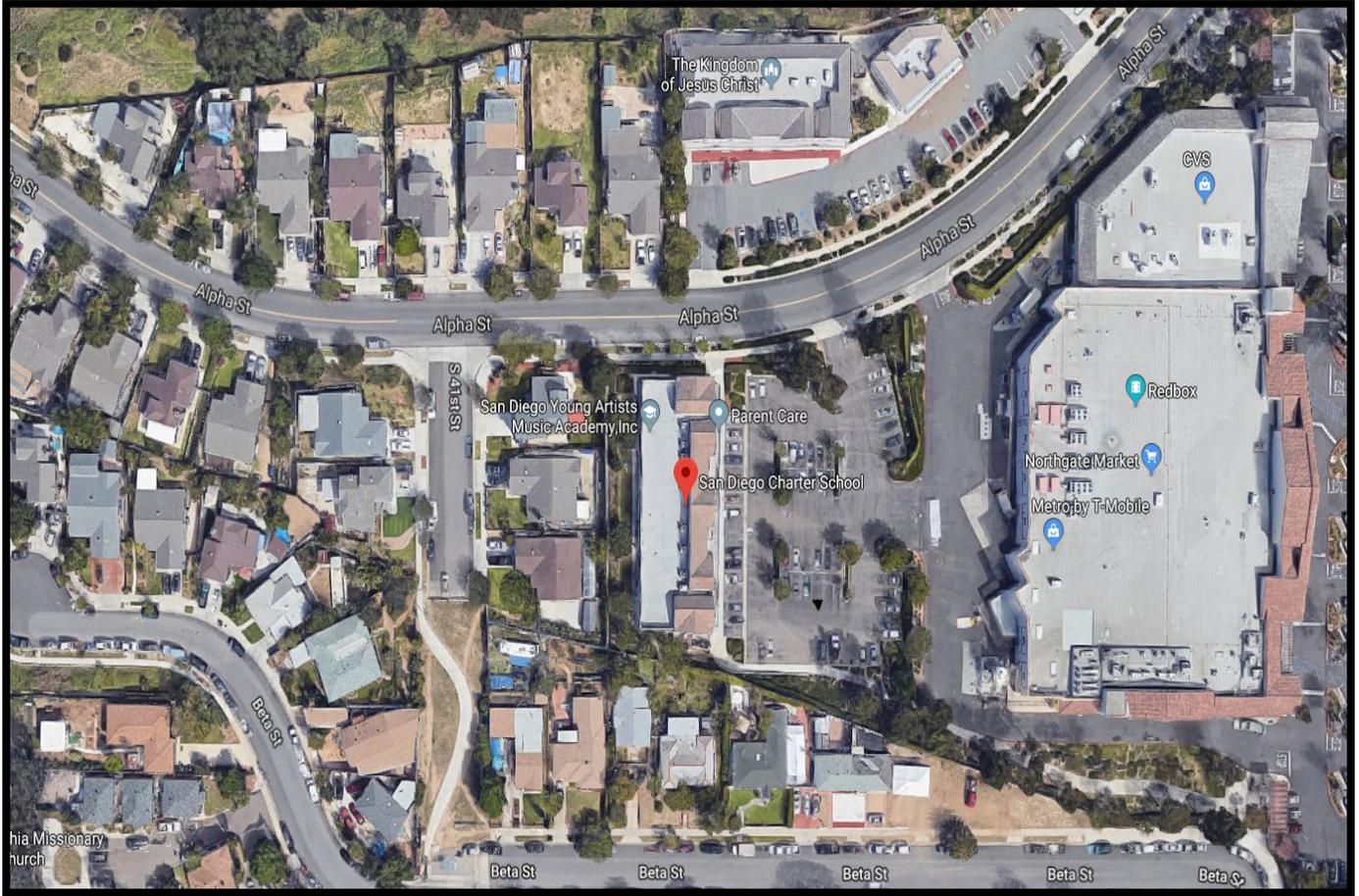
### Mission Valley Aerial Map



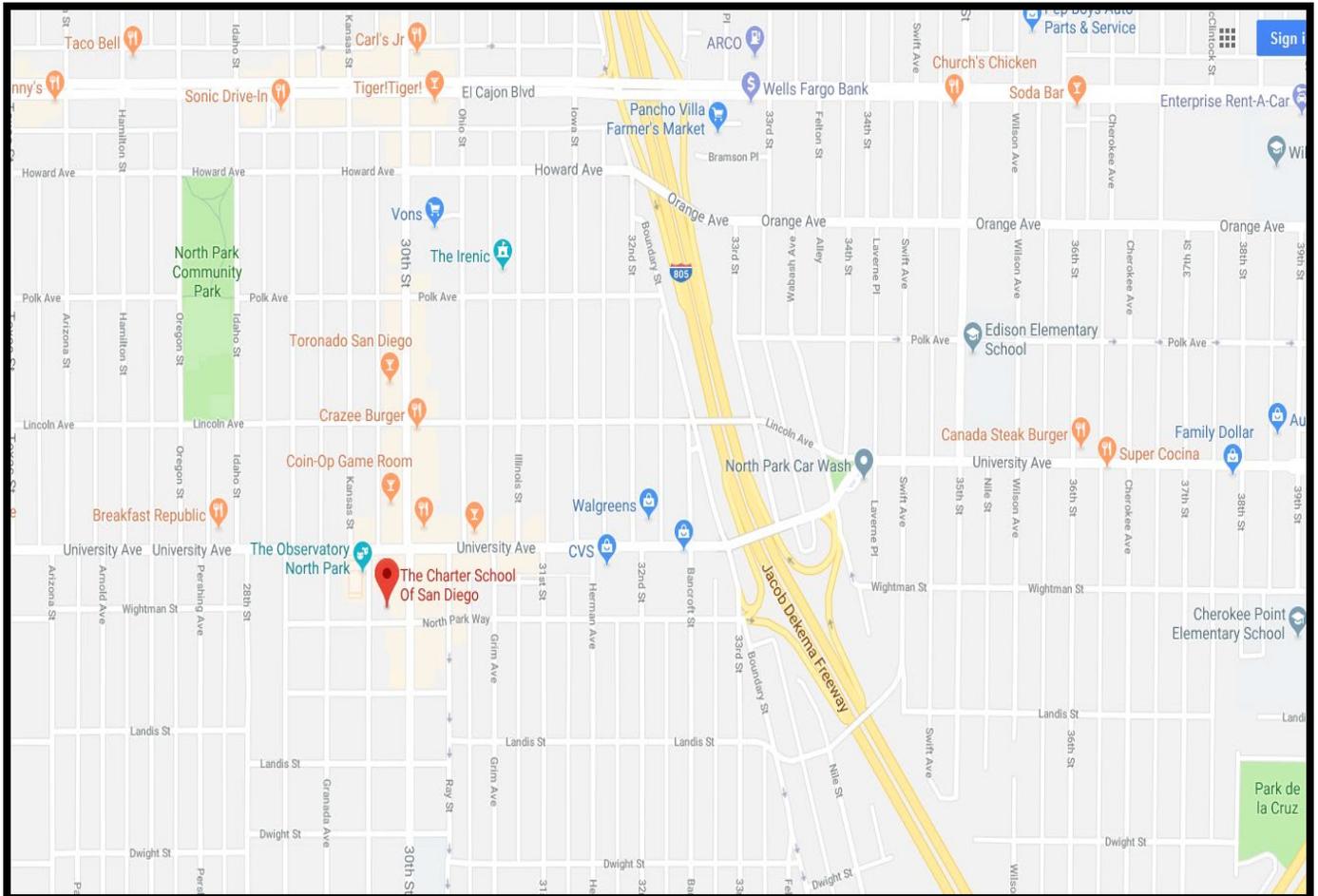
**Northgate Resource Center (RC) - CSSD**  
**RC Address: 4125 Alpha Street, Suites C & D, San Diego, CA 92113**  
***Located right behind the Northgate Market***  
**RC Public Phone Number: 858-678-2020**  
**RC Fax Number: 858-552-6660**



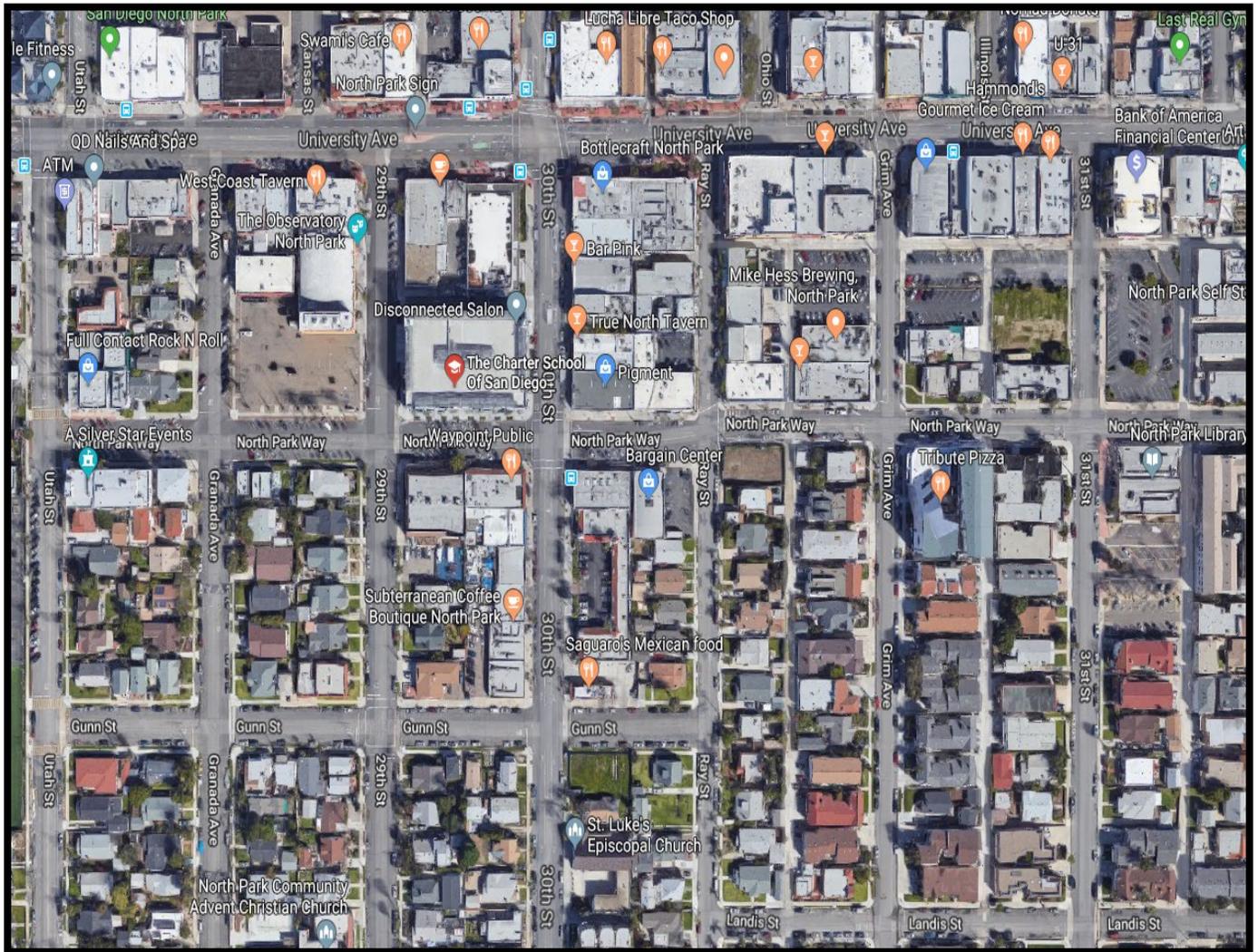
### Northgate Aerial Map



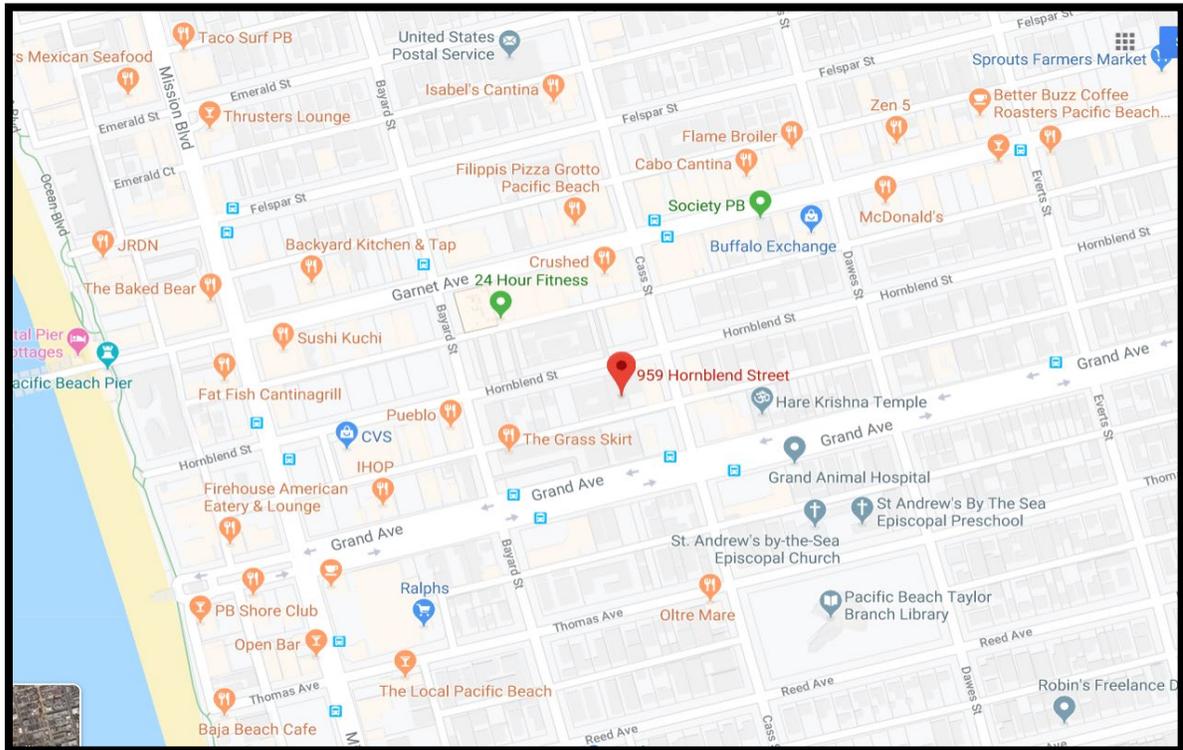
**North Park Resource Center (RC) - CSSD**  
**RC Address: 2940 North Park Way, San Diego, CA 92104**  
***RC is located on the ground floor/street level of the North Park parking structure***  
**RC Public Phone Number: 858-678-2020**  
**RC Fax Number: 858-552-6660**



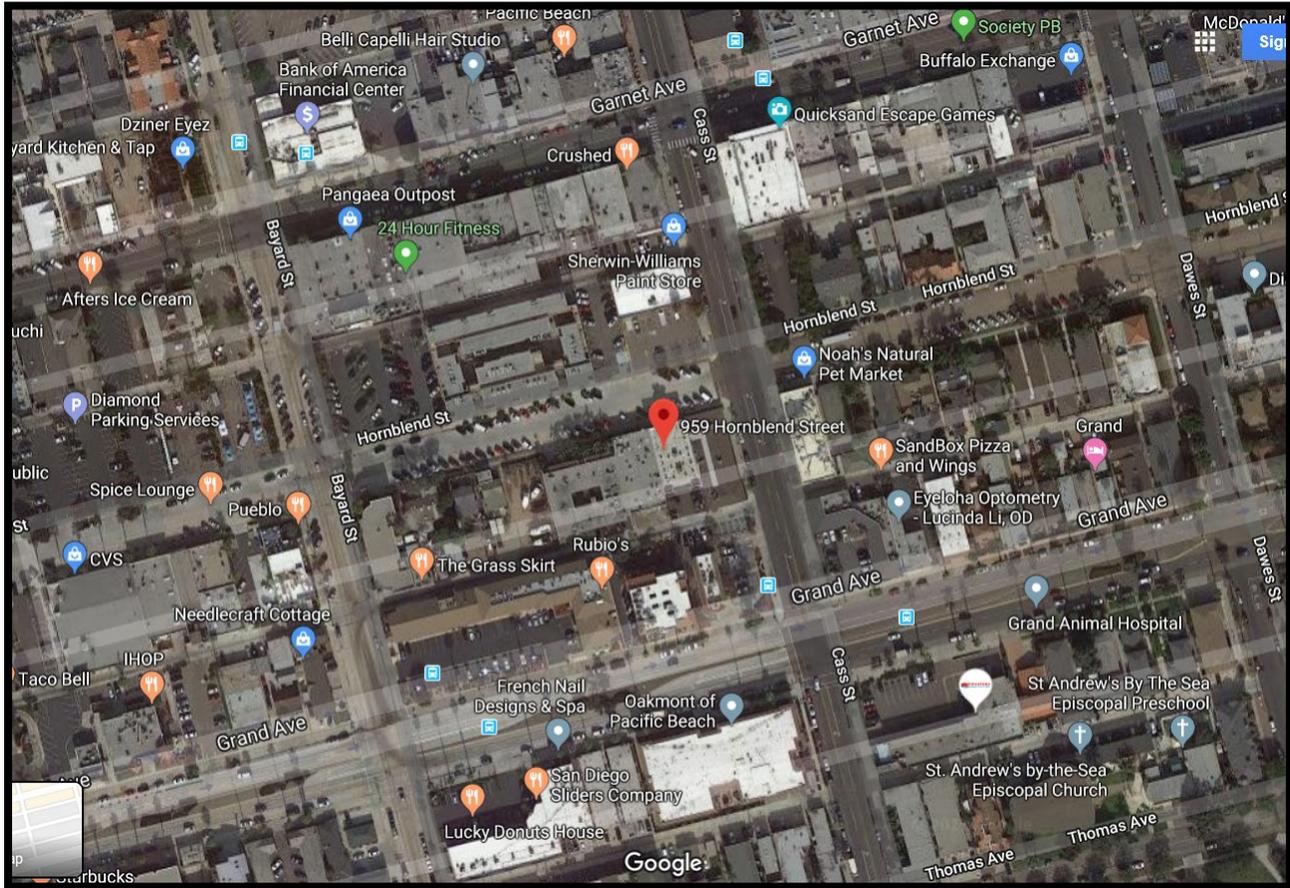
### North Park Aerial Map



**Pacific Beach Resource Center (RC) - Audeo**  
**RC Address: 959 Hornblend St, San Diego, CA 92109**  
**RC Public Phone Number: 858-678-2050**  
**RC Fax Number: 619-280-8033**



### Pacific Beach Aerial Map

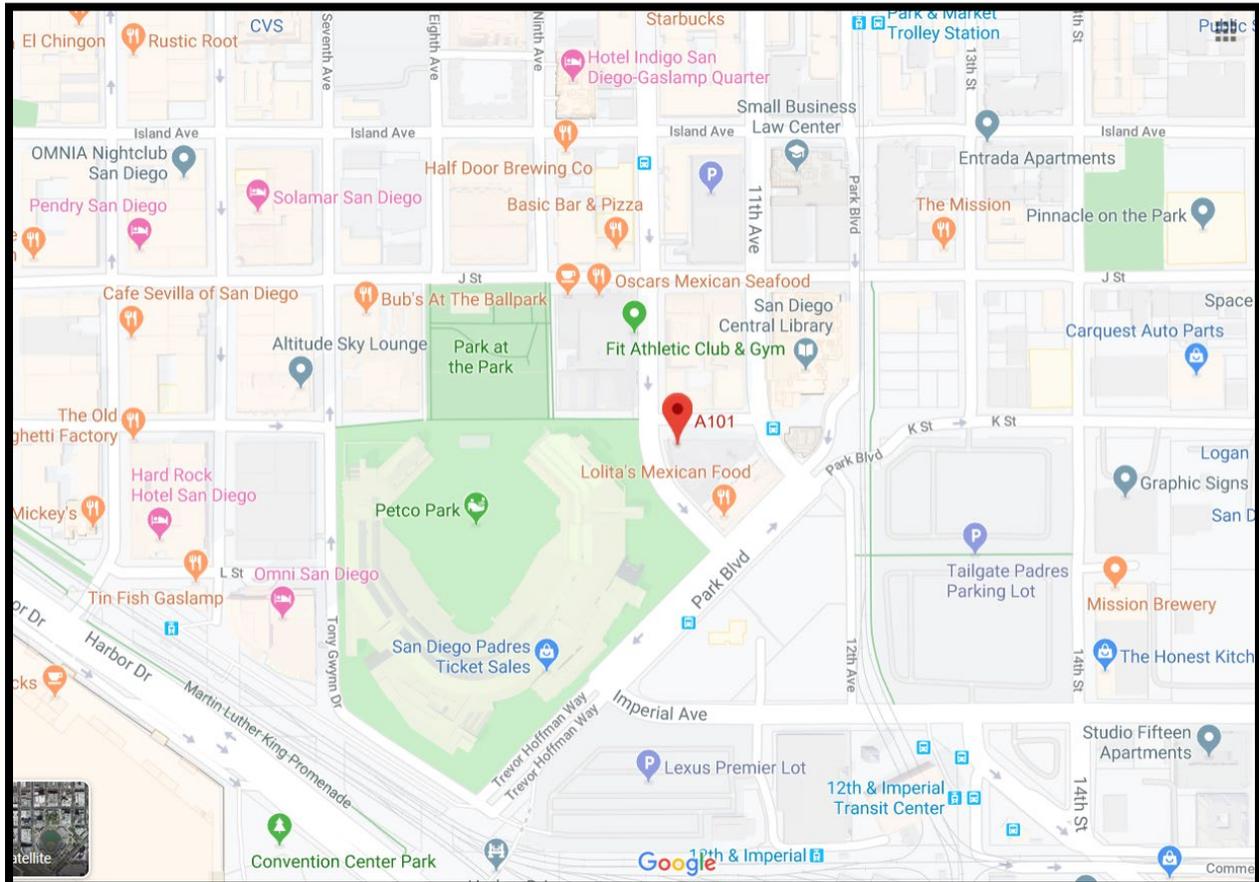




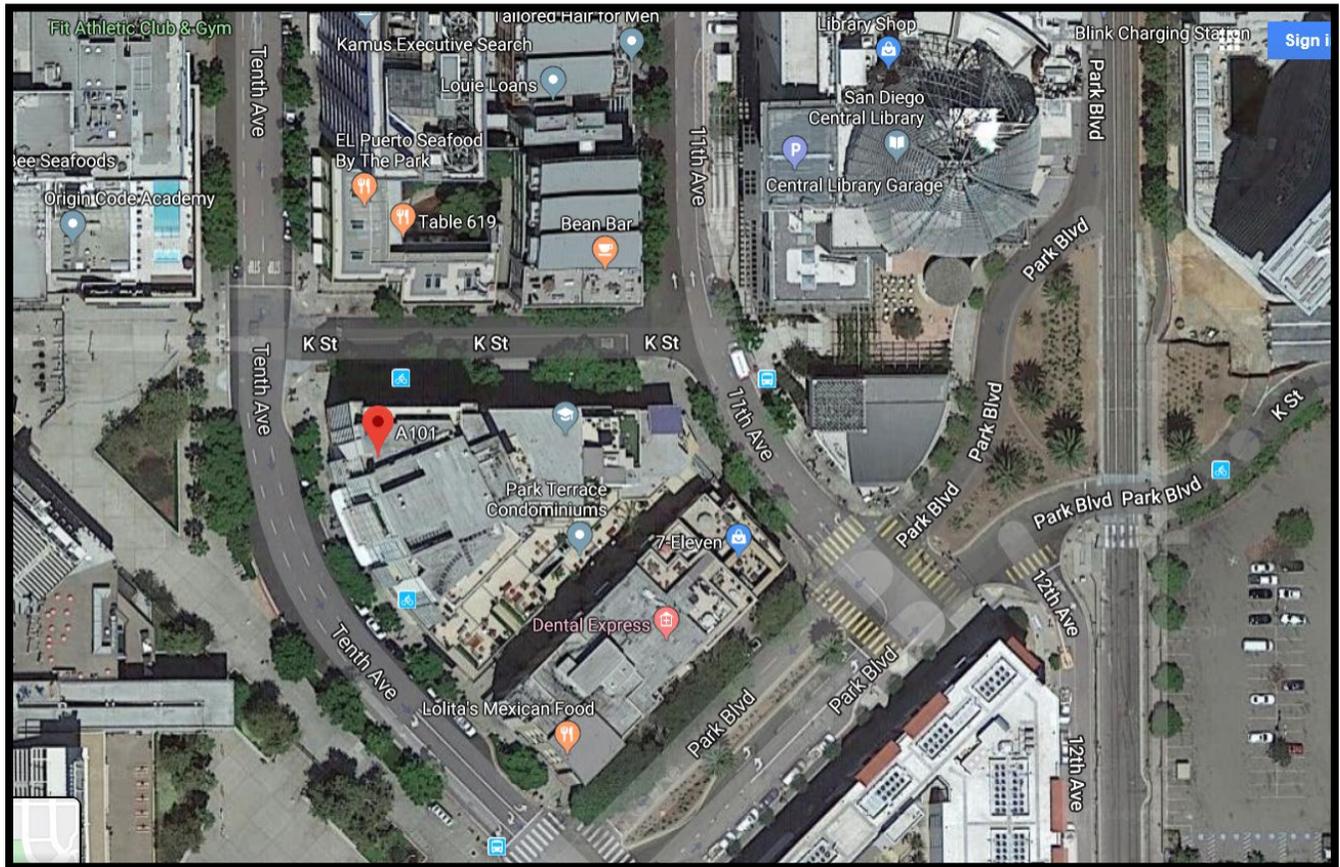
### Paradise Hills Cadet Corp Aerial Map



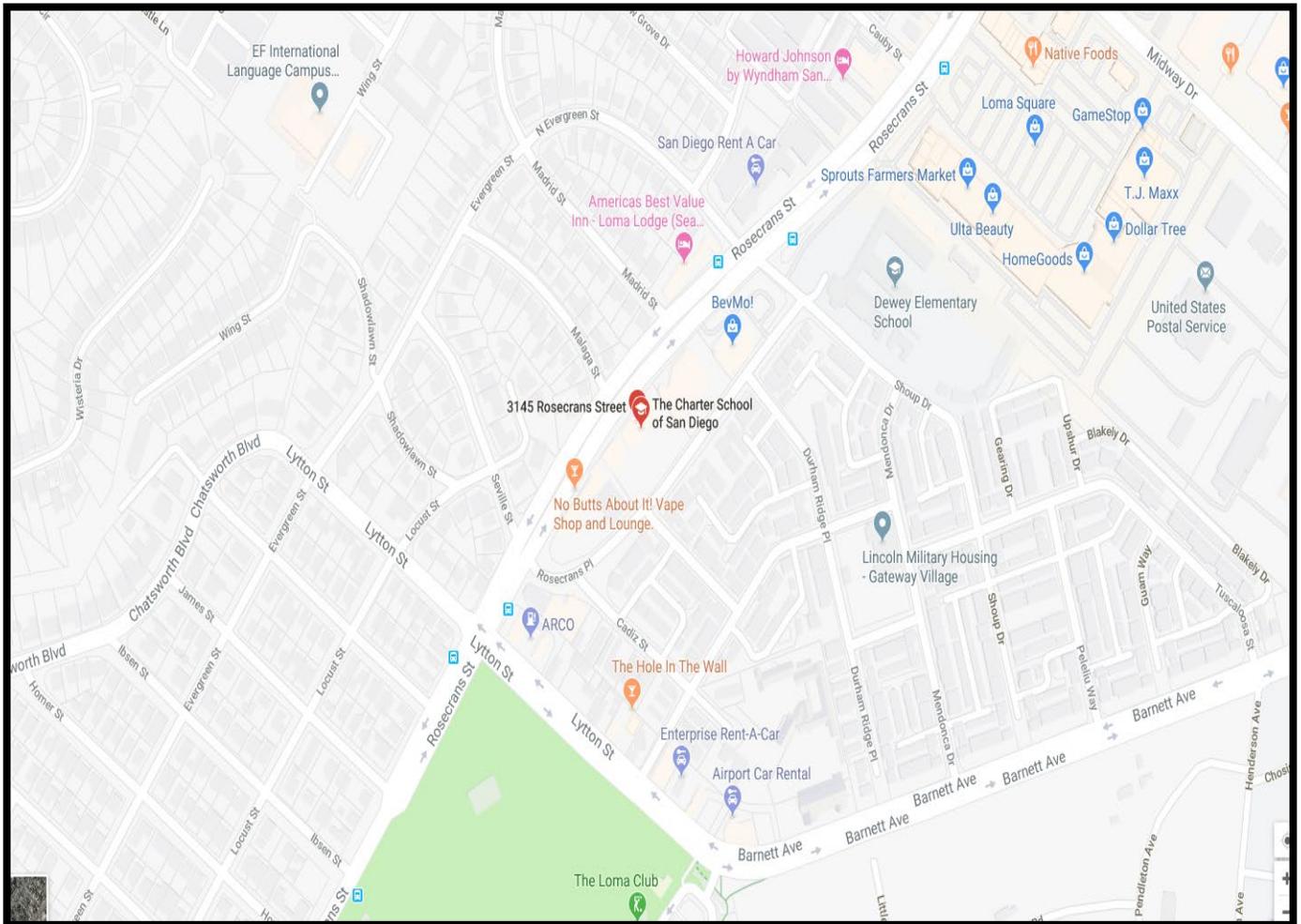
**Petco Park Resource Center (RC) - CSSD**  
**RC Address: 1091 K St., Ste. A101, San Diego, CA 92101**  
***In downtown San Diego, east of Petco Park***  
**RC Public Phone Number: 858-678-2020**  
**RC Fax Number: 858-552-6660**



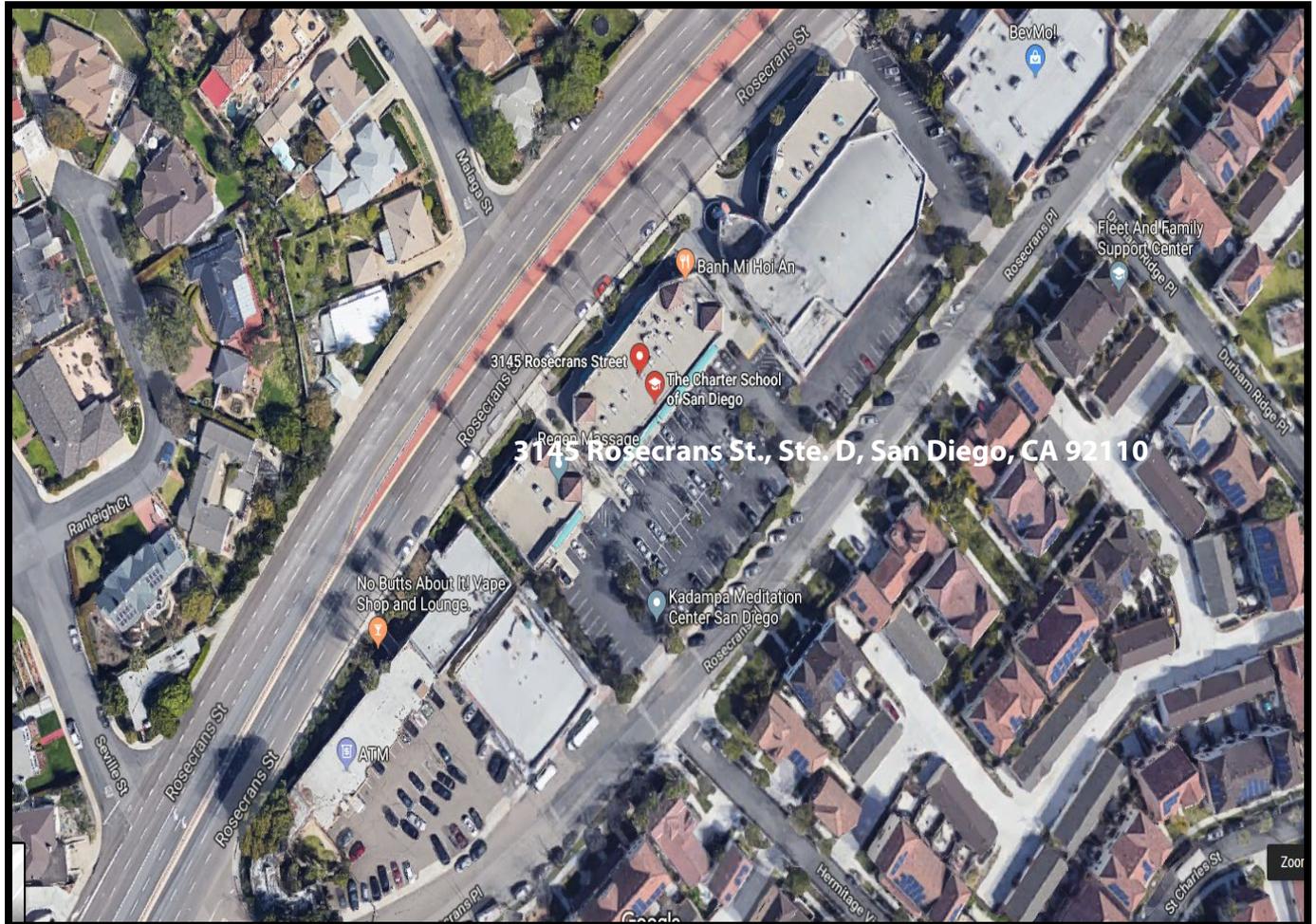
### Petco Park Aerial Map



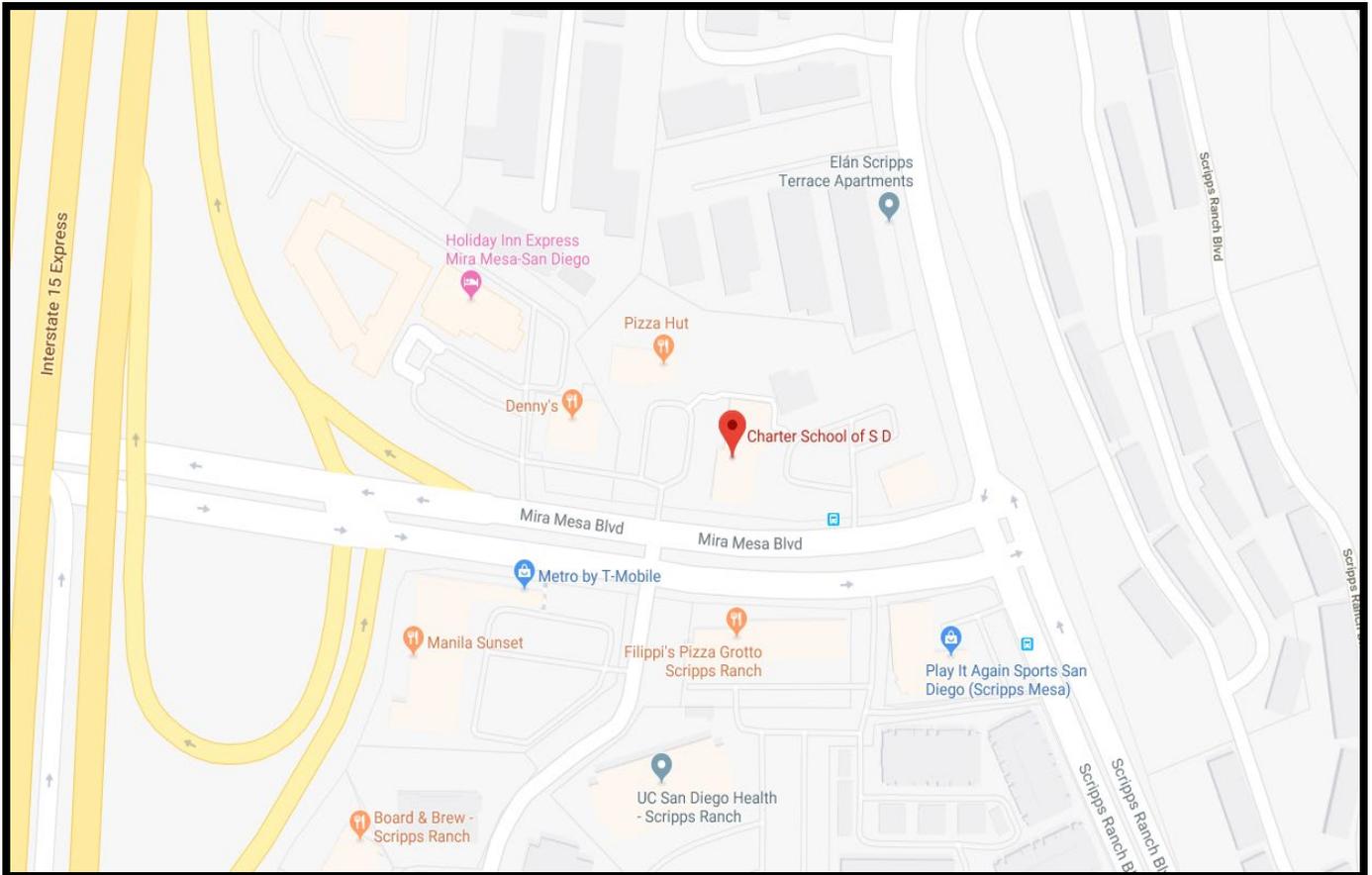
**Point Loma Resource Center (RC)-- CSSD**  
**RC Address: 3145 Rosecrans Street, Suite D, San Diego, CA 92110**  
***Located in shopping center with Bookstar***  
**RC Public Phone Number: 858-678-2020**  
**RC Fax Number: 858-552-6660**



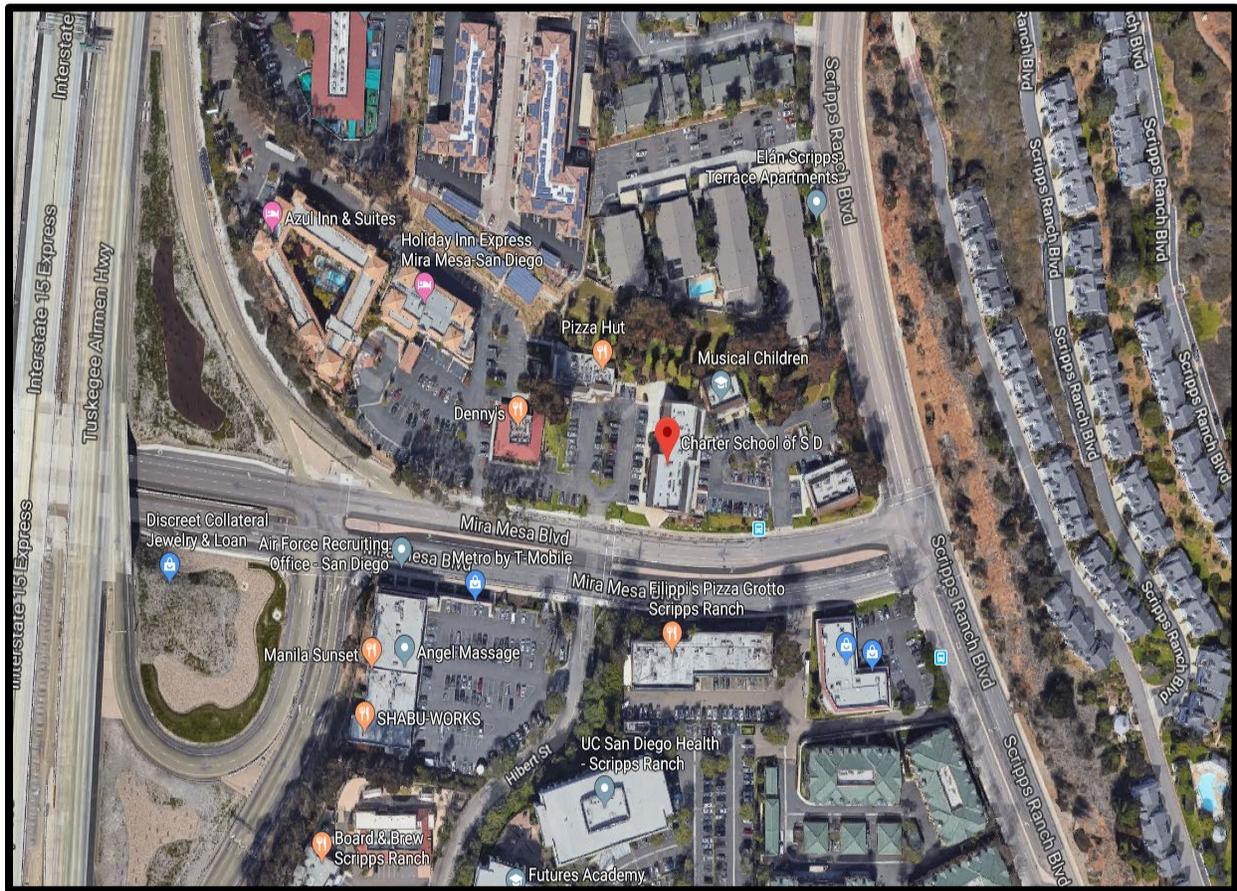
### Point Loma Aerial Map



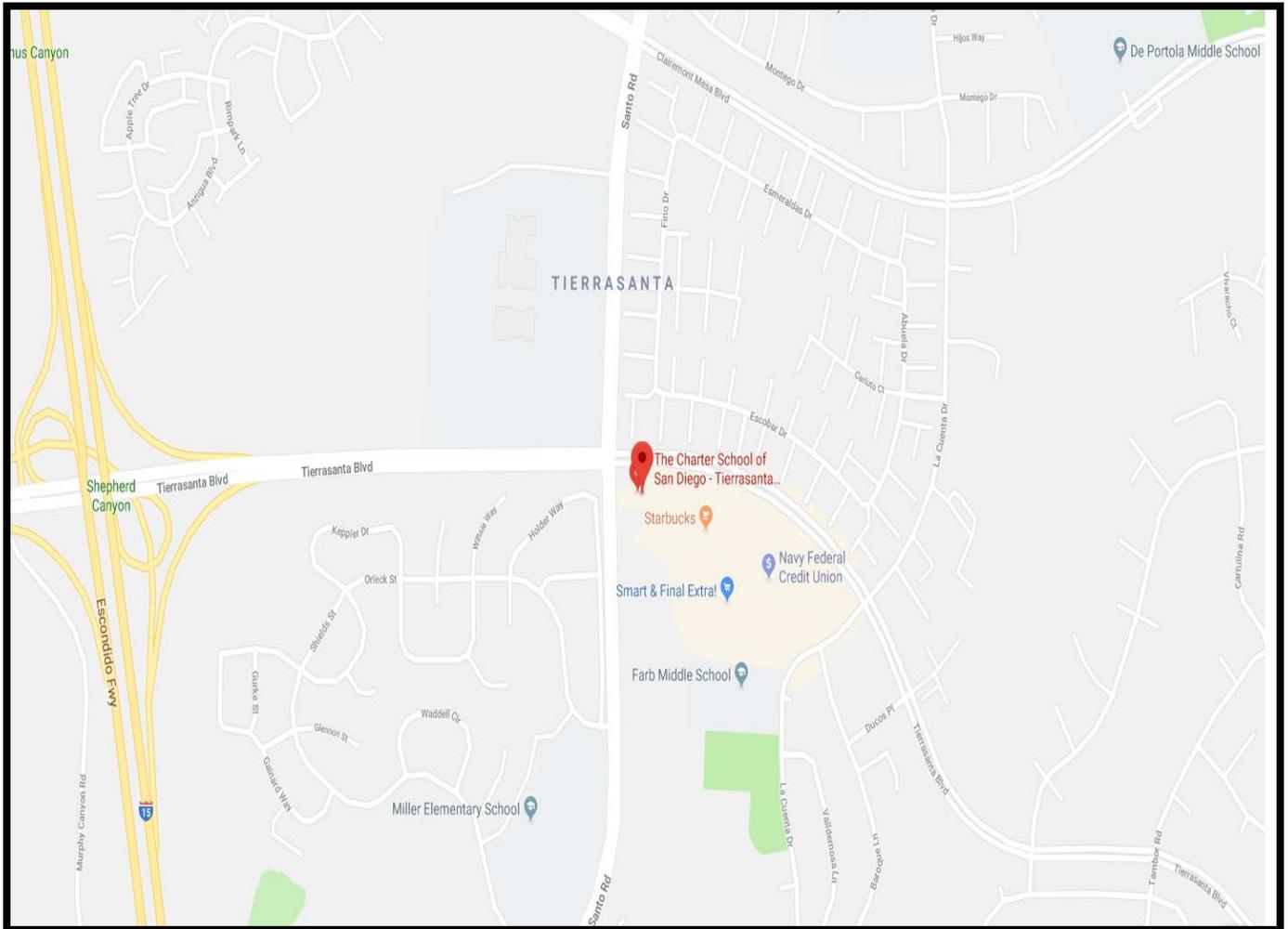
**Scripps Ranch Resource Center (RC) - CSSD**  
**RC Address: 9910 Mira Mesa Blvd., Suite A-2, Bldg. B, San Diego, CA 92131**  
***Same complex as Denny's, Pizza Hut and beside Ariana Kabob House***  
**RC Public Phone Number: 858-678-2020**  
**RC Direct Phone Number: 858-547-5995**  
**RC Fax Number: 858-552-6660**



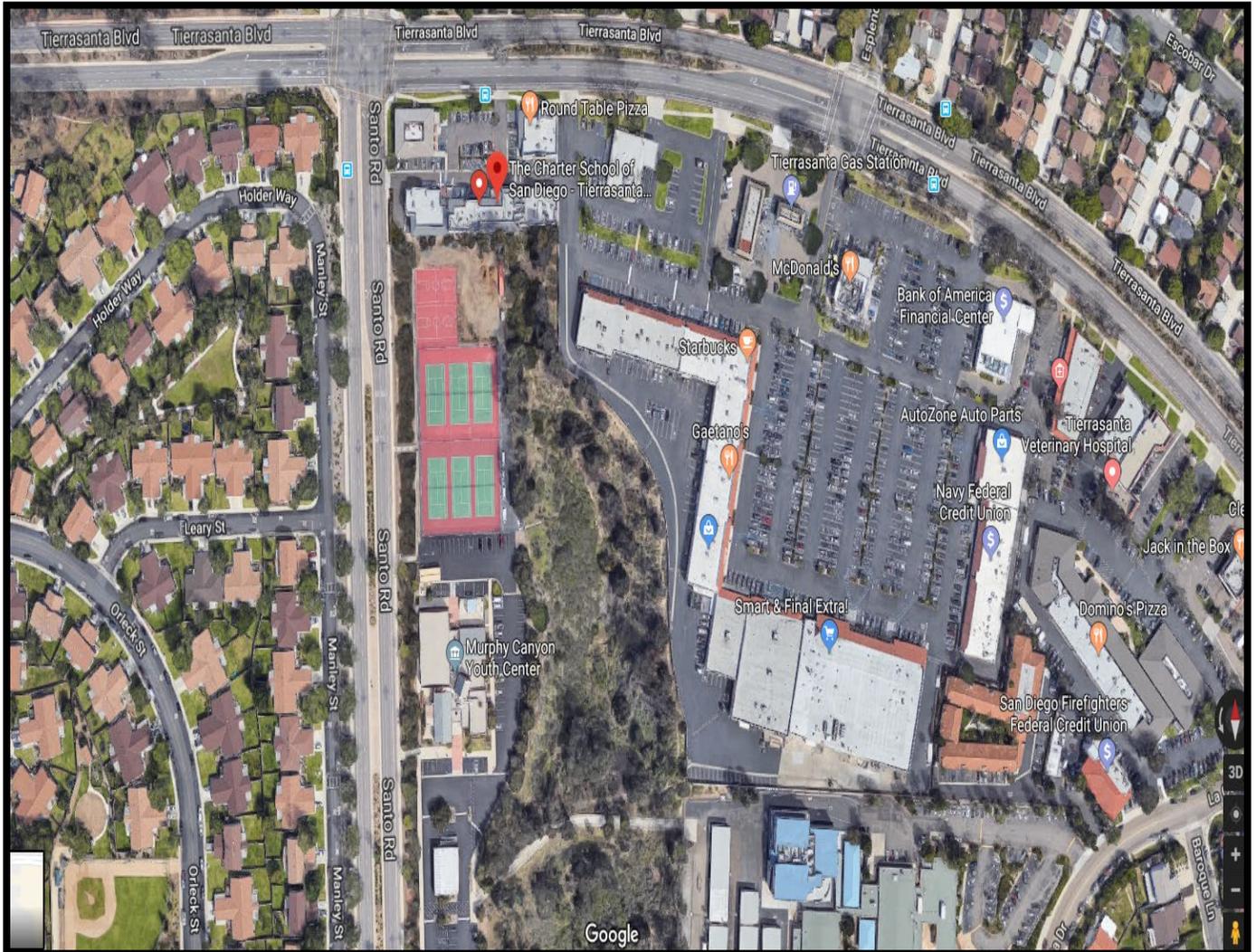
### Scripps Ranch Aerial Map



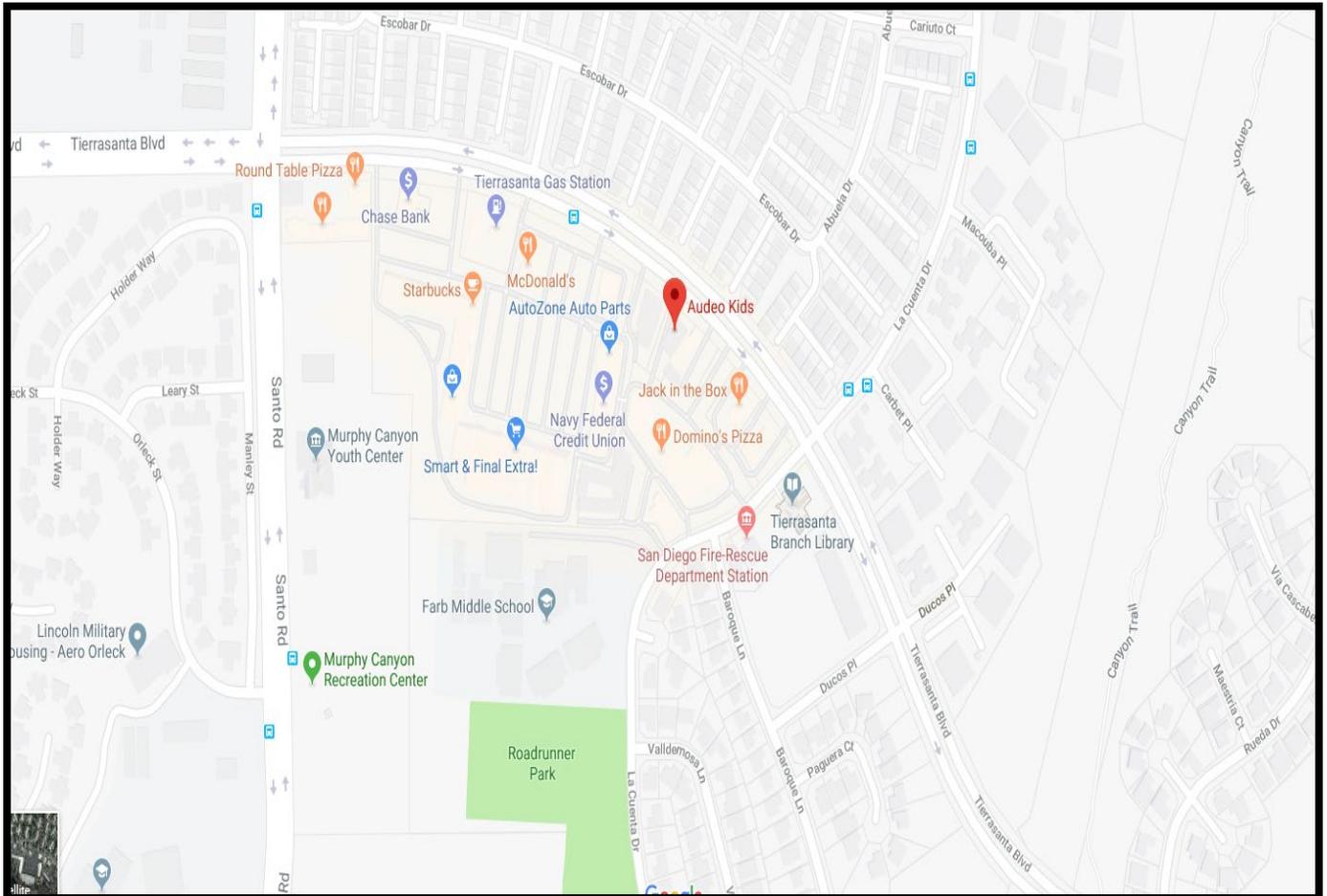
**Tierrasanta Resource Center (RC) - CSSD**  
**RC Address: 10425 Tierrasanta Blvd, Suite 101, San Diego, CA 92124**  
***First right from the center driveway to two-story building***  
**RC Public Phone Number: 858-678-2020**  
**RC Fax Number: 858-552-6660**



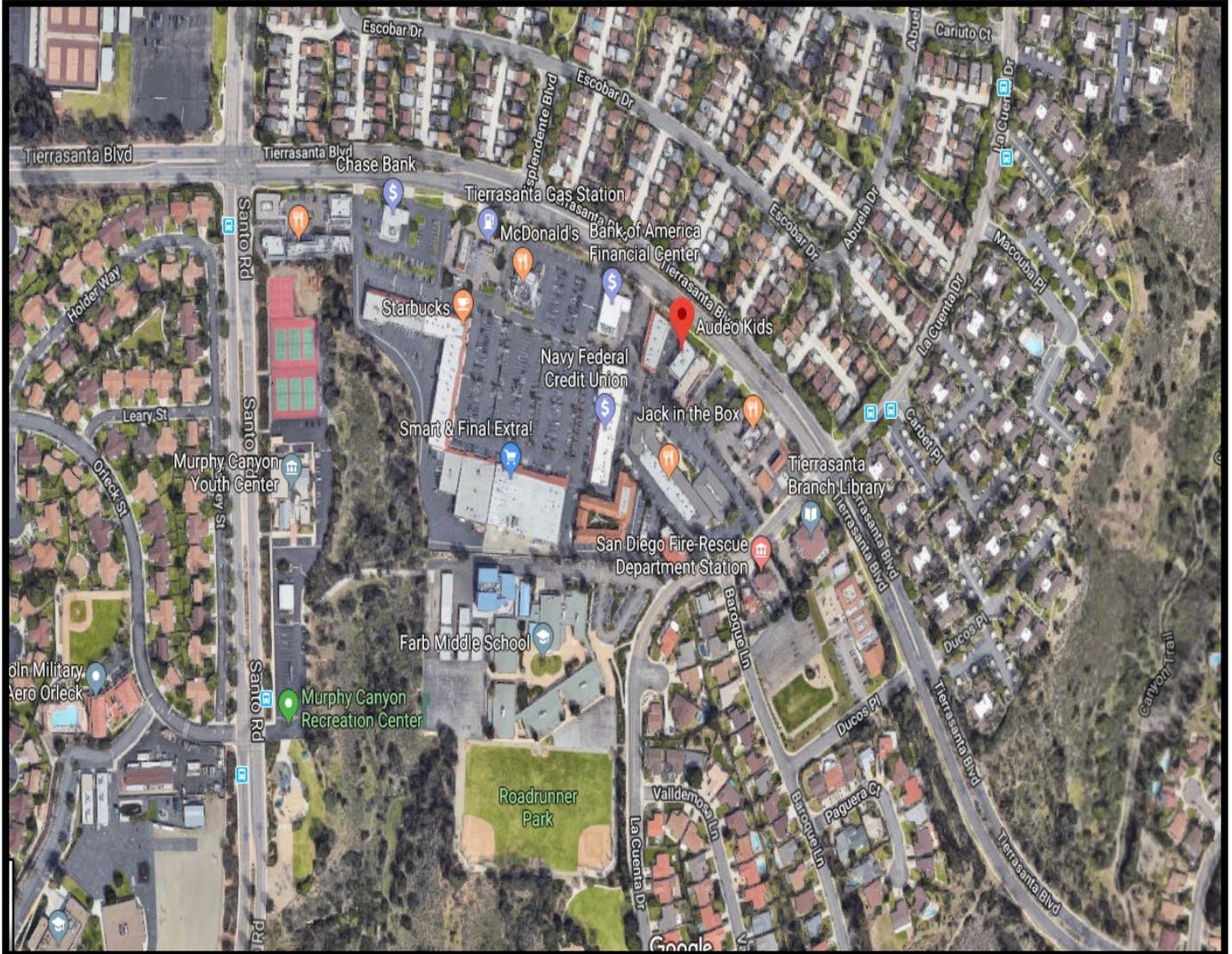
### Tierrasanta Aerial Map



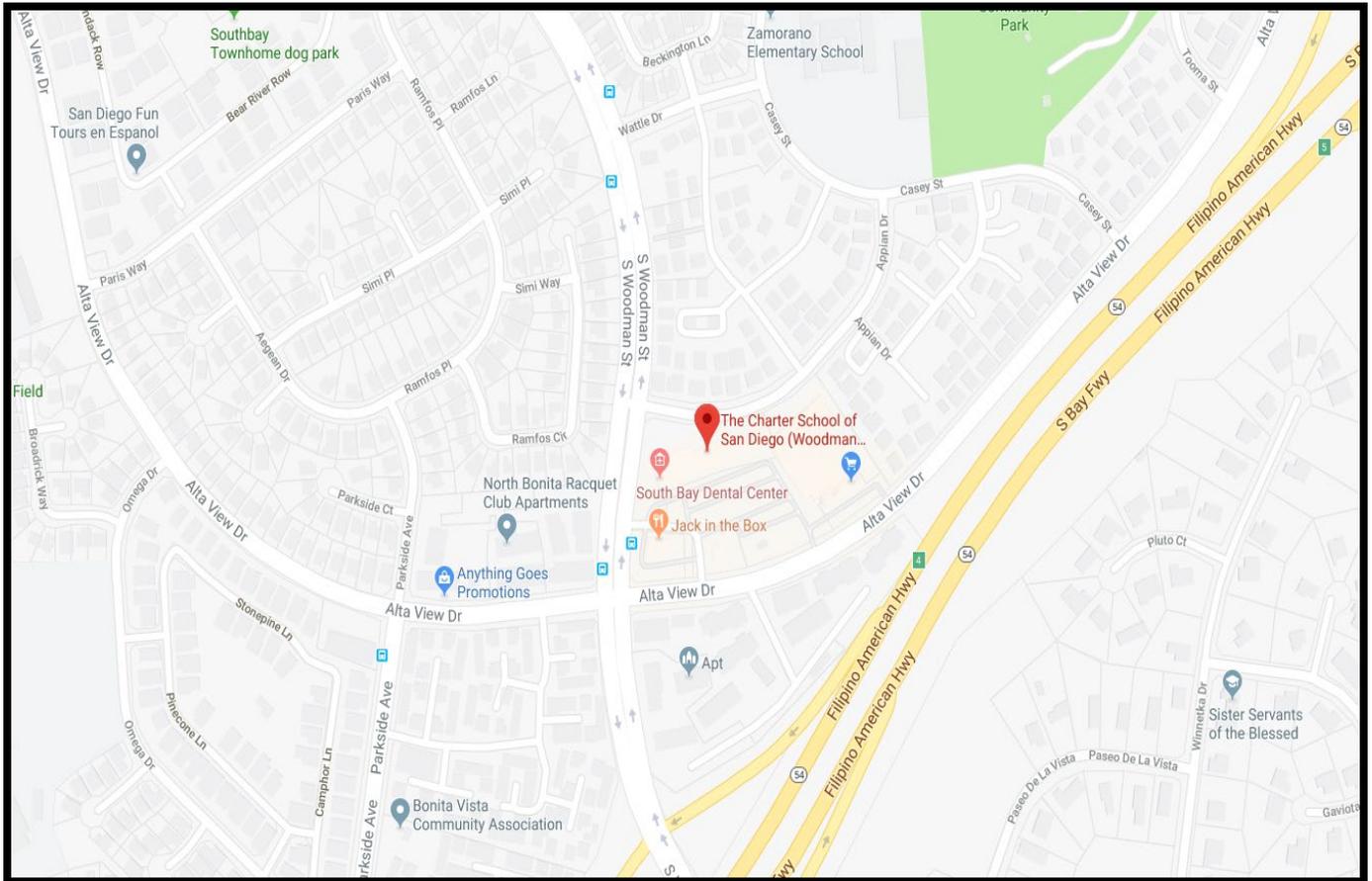
**Tierrasanta K- 5 Resource Center (RC) --Audeo**  
**RC Address: 10725 Tierrasanta Blvd., San Diego, CA 92124**  
***Same block as 76 Gas Station, Jack in the Box beside Tierrasanta Veterinary Hospital***  
**RC Public Phone Number: 858-678-2050**  
**RC Fax Number: 619-280-8033**



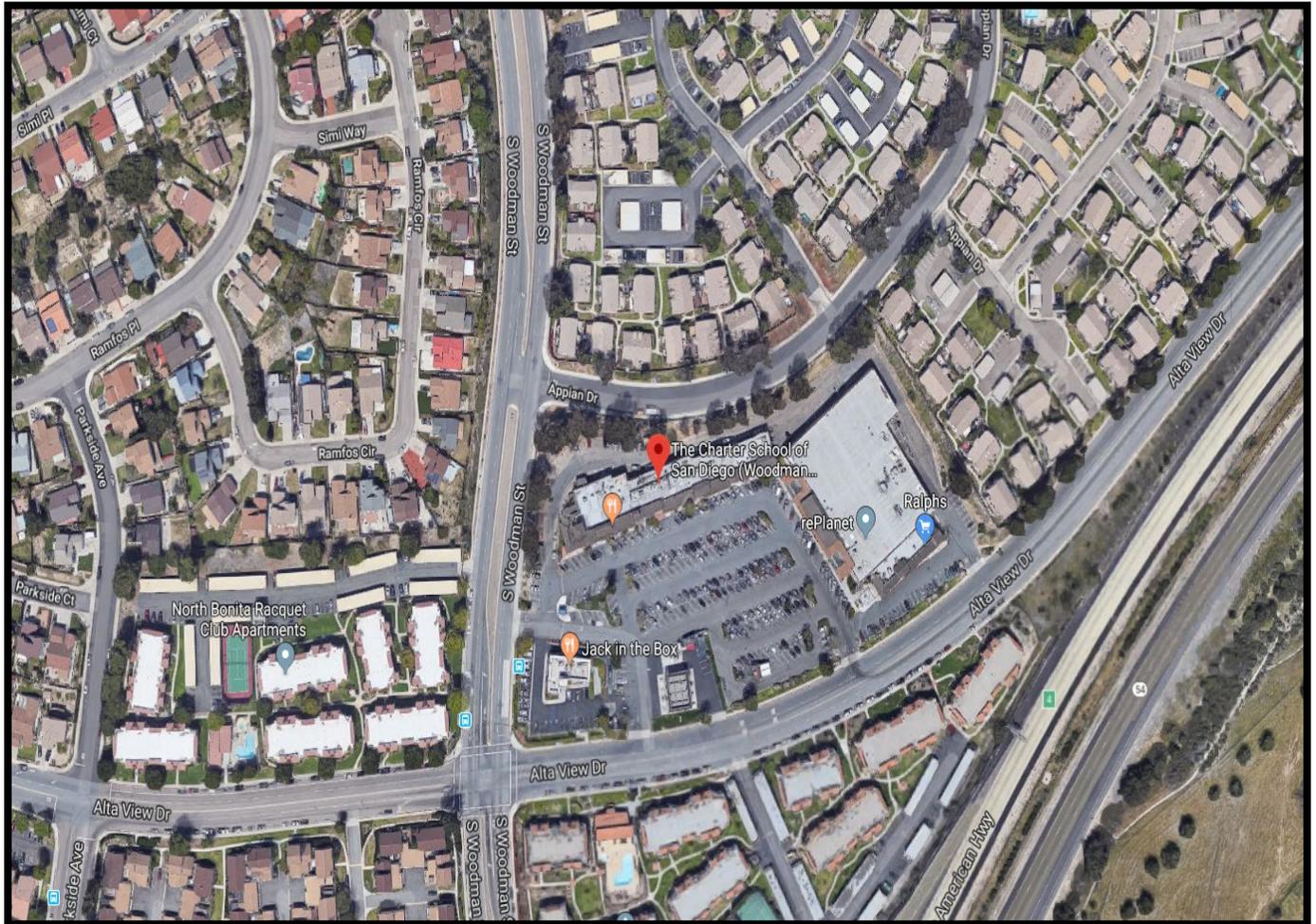
### Tierrasanta K-5 Aerial Map



**Woodman Resource Center (RC) - CSSD**  
**RC Address: 2939 Alta View Dr., Stes. B & C, San Diego, CA 92139**  
***By the Ralph's Supermarket complex beside Taco Fiesta II***  
**RC Public Phone Number: 858-678-2020**  
**RC Fax Number: 858-552-6660**



### Woodman Aerial Map



## HAZARD ASSESSMENT SUMMARY

### Assessment of School Crime

In assessing the crime rate for the last two school years at Audeo and CSSD, the crime data indicates that there have been no incidents of the last two years. The school staff will continue to monitor student behavior to ensure a safe and supportive environment. Both students and parents continue to rate the school high for providing a safe environment in their annual surveys.

	2020yr	Rate	2021yr	Rate	% Change
<b>PROPERTY CRIME</b>					
Arson	0	0.00	0	0.00	0.00
Burglary	0	0.00	0	0.00	0.00
Graffiti	0	0.00	0	0.00	0.00
Theft	0	0.00	0	0.00	0.00
Vandalism	0	0.00	0	0.00	0.00
Total	0				
<b>DRUGS &amp; ALCOHOL</b>					
Use of Alcohol/Drugs	0	0.00	0	0.00	0.00
Possession of Alcohol	0	0.00	0	0.00	0.00
Possession of Drugs	0	0.00	0	0.00	0.00
Sale of Furnishing of Alcohol/Drugs	0	0.00	0	0.00	0.00
Total	0		0		
<b>CRIMES AGAINST PERSONS</b>					
Assault with Deadly Weapon	0	0.00	0	0.00	0.00
Battery	0	0.00	0	0.00	0.00
Homicide	0	0.00	0	0.00	0.00
Robbery/Extortion	0	0.00	0	0.00	0.00
Sex Offense	0	0.00	0	0.00	0.00
Total			0		
<b>OTHER OFFENSES</b>					
Bomb Threat	0	0.00	0	0.00	0.00
Destructive/Explosives	0	0.00	0	0.00	0.00
Loitering/Trespassing	0	0.00	0	0.00	0.00
Possession of Weapon(s)	0	0.00	0	0.00	0.00
Total	0		0		
<b>ENROLLMENT</b>	2020yr	2478	2021yr	1739	

*The data represented is the total number of reported incidents within each crime category and as rates per 100 students enrolled. It is important to note that comparisons (% Change) are calculated from incident rates and not total numbers, because the rates reflect changes in student enrollment from year to year. Crimes involving Arson, Graffiti, and Vandalism must exceed \$100 per incident, theft \$50, and Burglary has no dollar limit. Any rate change to or from zero is represented as a 100% change. Caution should be used when drawing conclusions from individual rate changes. Improved reporting practices may have resulted in increases in crime rates which may not represent actual increases in crime.*

## Emergency Notification Information

Often, the first action to occur as an emergency incident is unfolding is the need to alert or warn others. The Safety Coordinator will serve as the primary notification point for emergencies at this RC. The primary or alternate Incident Commander will notify the Safety Ambassadors. Once notified, they will begin contacting public safety officers to assist the Incident Commander, pursuant to their policies and procedures.

The very next action to occur is the need to alert or warn RC staff. Methods for notifying staff include: Telephone – Landline and/or cellular, RC radio, Runners – staff and/or students, Siren System – Siren and/or bell depending upon RC, Public Announcement System (PA), Handheld Air Horns or Bull Horns.

The method utilized will depend upon the circumstances of the emergency and the resources available at this RC. Additional information is found in the School Emergency Procedure.

The Safety Coordinator will conduct an initial assessment based on available information and will advise the Incident Commander and Office of the President of the recommended actions to be taken. However, if the emergency requires immediate action, the Safety Coordinator will initiate the appropriate warnings and notifications to public safety responders without delay.

As services are being dispatched to assist, the Incident Commander will begin to gather and direct RC resources as necessary to address the emergency or disaster at hand. The following external and internal contacts may be of assistance:

### ALWAYS USE A HARD-WIRED PHONE IN AN EMERGENCY

CONTACT	External Contacts	
	EMERGENCY	NON-EMERGENCY
San Diego Police	911	619-531-2000
San Diego Fire	911	619-533-4300
San Diego Paramedics	911	619-531-2000/ 858-484-3154
San Diego Water Emergency	619-515-3525	
San Diego Gas & Electric	1-800-611-7343	

## Internal Contacts for CSSD and Audeo

<b>CONTACT</b>	<b>EMERGENCY</b>	<b>NON-EMERGENCY</b>
<b>Life or limb Threatening</b>		
<b>Primary Contact: Executive Director</b>	<b>619-992-5740</b>	<b>858-678-2042 Business Office</b>
<b>CSSD Safety Coordinator</b>	<b>619-757-0028</b>	<b>858-678-2045 Business Office</b>
<b>Audeo Safety Coordinator</b>	<b>619-757-0028</b>	<b>858-678-2045 Business Office</b>
<b>CSSD Administrator of Instructional Services</b>	<b>909-720-9216</b>	<b>858-678-2051 Business Office</b>
<b>Audeo Home Administrator of Instructional Services</b>	<b>619-465-2565</b>	<b>858-678-3919 Business Office</b>
<b>Audeo Administrator of Instructional Services</b>	<b>949-280-9499</b>	<b>858-678-2056 Business Office</b>
<b>Facilities Emergency Maintenance</b>	<b>619-757-0028</b>	<b>858-678-2045 Business Office</b>
<b>Communications Office</b>	<b>858-678-4811</b>	

## Emergency Resource Information

### Emergency Disaster Kit

This RC maintains: one kit.

The kit(s) are located: Janitorial Closet

The Emergency Disaster Kit stores necessary resources for an RC incident command. This kit should not be confused with the Crisis Response Box, which is carried out of the RC to a Public Safety Incident Command Post. RC personnel should use the items contained within the kit to manage their incident command. The following equipment and supplies are stored inside the Emergency Disaster Kit:

- Handheld Air Horns – recommend a minimum of five (Incident Commander & Chiefs)
- Bull Horn – recommend a minimum of one
- Batteries – recommend a minimum of two sets for bull horn, flashlights, emergency radios and walkie-talkies)
- Flashlights – recommend one per Incident Command Team member (17) (Search & Rescue Team and First Aid and Medical Team requirements listed separately)
- Walkie-Talkies – recommend a minimum of five (Incident Commander & Chiefs)
- Duct Tape – recommend a minimum of two rolls used for marking blank vests.
- Rosters - recommend a minimum of one set per room sorted by alphabet
- Steno Pads (5x7) – recommend one per Incident Command Team member (17)
- Pencils & Pens - recommend one each per Incident Command Team member (34)
- Copies of Forms
- Chalk - recommend twenty-five sticks, red in color
- 3x5 Cards – recommend one hundred
- Department or RC Placards
- First Aid & Medical Team Supplies
- Search and Rescue Team Supplies
- Vests for Key Personnel – recommend a total of 17 for Incident Command Team members (Search & Rescue Team and First Aid & Medical Team requirements listed separately in Section Four)

All Emergency Disaster Kits and their contents are the responsibility of the Incident Commander. The Incident Commander will conduct annual inspections in October of each year. The responsibility to inspect and replace non-operating equipment and supplies belongs to the RC. The responsibility to delegate the transport the Emergency Disaster Kit to an activated Command Post belongs to the following individuals:

Primary: Incident Commander

Alternate: Operations Chief

## Crisis Response Boxes

This RC maintains: \_\_\_\_\_ 1 \_\_\_\_\_ Crisis Response Box.

The Crisis Response Boxes are located: Janitorial Closet and each Support Team Member.

The Crisis Response Boxes are a file folder type- boxes. The boxes are clearly labeled and contain vital information needed by the Incident Command Team and Public Safety Incident Commander (in the event a public safety incident command post is established. The following information is stored inside each box:

- Current copy of the Emergency Plan which should include RC evacuation procedures, including staging locations. Also included should be an aerial photo including all new structures, electric, gas, water cable, telephone, intrusion and fire alarm shutoffs, RC numbers, gate openings for vehicles/pedestrians and all fire hydrants that have been added to accommodate these new structures.
- Current map of RC layout. Map must show all buildings, RC numbers, and evacuation routes.
- Most current blueprint (architectural drawings).
- Current roster of students and staff assigned to the RC, as well as issues pertaining to special needs students. These rosters will be in alphabetical order for staff and students. Student roster must be in alphabetical order, divided by grade level and have emergency contact/release information.
- A list of the RC's staff skills including language translation, specialized training, and emergency equipment carried in vehicles.
- If available, current student photos on CD-ROM or most recent year book.
- Telephone numbers listed in numerical order for each RC/building.

Maintenance of the Crisis Response Boxes and their contents is the responsibility of the Incident Commander. The Incident Commander will work with Safety Coordinator on conducting an inspection during October of each year. The responsibility to inspect and replace information belongs to the RC.

The responsibility to carry the box to an activated Public Safety Incident Command Post belongs to the following individuals:

Primary: Incident Commander

Alternate: Operations Chief

## Emergency Quick Reference Guide

This document, often referred to as the “Emergency Quick Reference Guide” is a red, white and blue quick flip-type reference chart that provides basic guidelines for emergencies. The information in this guide is drawn directly from the School’s Emergency Procedures. Each RC and office has been equipped with a copy of the guide. The guide provides basic direction for teachers and staff in the event of an emergency. All staff should familiarize themselves with the content annually. Replacement copies are available through the Operations Department.

## EMERGENCY OPERATIONS OVERVIEW

The protection of lives shall be the primary priority of all emergency operations and procedures. The protection of property shall be secondary to life safety. The emergency procedures within this Plan are designed to facilitate life safety through the use of simple, basic procedures based on the Standardized Emergency Management System (SEMS) and the National Incident Management System (NIMS) that utilize the Incident Command System (ICS) as the basic response management structure.

### Disaster Service Workers

California Government Code, Chapter 8, Section 3100 states: “...all public employees are hereby declared to be disaster service workers subject to disaster service activities as may be assigned to them by their superiors or by law.” In accordance with these provisions, all staff members are considered “disaster service workers” during emergencies and must remain in the RC to carry out assigned responsibilities. RC staff should be familiar with emergency procedures and any assigned responsibilities. During an emergency, staff will serve on response teams and implement response procedures. If a teacher has been assigned to an Incident Command Team position in the following list, the teacher will first ensure the safety of the students and accompany the students to the Assembly Area (also known as the “Evacuation Area”), where the students will be reassigned to another teacher. The teachers will then carry out their assigned Incident Command Team responsibilities.

### Plan Maintenance

The Incident Commander is responsible for the maintenance of this plan. The Emergency Plan is Criterion 2 of California’s mandated Comprehensive Safe Schools Plan. The School Safety Coordinator is responsible for annual plan review. Appropriate changes or modifications shall be forwarded by the Incident Commander to the Safety Coordinator for approval prior to any distribution. The Emergency Plan will be maintained on a secured intranet with “read only” access to the Incident Command Team and revision access to the Incident Commander and the Safety Coordinator.

### Training & Exercises

Training is a key component to ensure successful emergency operations. The adage “people will do what they have been trained to do” is consistently proven in actual emergencies. Exercises allow “people” to practice what they have been trained to do and improve their skills for an actual emergency.

The Incident Commander will coordinate annual trainings for all staff on the basic emergency procedures of this plan. All new staff assigned to the RC will receive basic training within 30 days of assignment. Basic training can simply involve knowledge of basic SEMS and ICS protocols, key evacuation locations, parent reunification locations, and the location of related resources. Members of the Incident Command Team will receive additional training specific to their duties every year by the Incident Commander and School Safety Coordinator.

The Incident Commander will coordinate annual exercises for all staff as outlined in the School Emergency Procedures.

## INCIDENT COMMAND TEAM OVERVIEW

According to ICS, the size of the organization (i.e. number of positions) will vary depending on the operational needs of the incident. In some cases, one individual may be able to fill more than one “position”. (Example: in a small incident the School Principal oftentimes serves as the Incident Commander and the Public Information Officer.)

*Only under very unusual conditions will all of the positions identified below be activated and fully staffed. To that extent, the Incident Commanders have been encouraged to “cluster” certain same-section positions, if the workload allows. The Incident Commander could assume the Safety Officer, Public Information Officer, and Liaison Officer duties. The Planning & Intelligence Chief could assume the Documentation and Situation Analysis duties.*

### Incident Command Team Assignments

Key staff will be pre-assigned to the Incident Command Team and have specific duties during emergencies. These duties include:

- **Incident Commander** – responsible for overseeing the RC emergency operations. Typically, also assumes responsibilities of the Safety Officer, Liaison Officer, and Public Information Officer duties

- **Safety Officer** - ensures that all activities are conducted in as safe a manner as possible
- **Public Information Officer** – acts as official spokesperson for the RC in an emergency situation, until the School’s Communications Officer is available
- **Liaison Officer** – serves as the point-of-contact for agencies outside of the School’s organization.
- **Operations Chief** – manages direct response to the RC emergency
  - **Facility Check & Security** – controls utilities, restricts access to unsafe areas, provides traffic control, and communicates damage to Incident Commander
  - **Search & Rescue Leader and Team** – checks RC for damage, rescues victims, and reports RC conditions
  - **First Aid & Medical Leader and Team** – provides medical response including CISM (Critical Incident Stress Management)
  - **Student/Parent Reunification**
    - **Assembly Area** – ensures the care and safety of all students in RC (except those in the Medical Treatment Area)
    - **Request Gate** – processes requests by parents or authorized adults for release of students
    - **Release Gate** – releases student to parent or authorized adult
- **Planning & Intelligence Chief** – in charge of collection, evaluation and documentation of information about the incident
  - **Documentation** – collects, evaluates, and documents event
  - **Situation Analysis** – assesses the overall incident
- **Logistics Chief** – provides facilities, services, personnel, equipment and materials to support response – includes food and transportation services
  - **Supplies, Facilities, & Staffing** – provides supplies, equipment and staffing to support response
- **Finance & Administration Chief** – tracks purchases, staff hours, costs, and student accountability

In the event of an emergency, a Command Post will be established by the Incident Commander. Incident Command Team members will be informed of the location upon activation.

The Emergency Roles and Responsibilities Section (Section Four) of this plan provides checklists for each of the above assignments. The Incident Command Team will report

**to the Incident Commander at the Command Post. Any staff may be assigned to assist each of the above positions depending upon the circumstances and demands of the incident and care of the students and staff.**

**The Emergency Operations Center (EOC) located at the Corporate Offices may be activated to support RC emergency operations. In the event that the EOC is activated, the Incident Commander will establish communications and coordinate closely with the EOC.**

**It's important that the Incident Command Team refer to both the Emergency Procedures and Emergency Quick Reference Guide for command directives and clarifications.**

## **Notification to Staff of Dangerous Students**

**The administration will inform the Administrator of Instructional Services of information received from the court and the Probation Department. The Administrator of Instructional Services shall disseminate the information to those teachers directly supervising or reporting on the behavior or progress of the student for the purpose of working with the student in an appropriate fashion, to avoid being needlessly vulnerable or to protect other persons from needless vulnerability.**

**Any information received by a teacher and administrator shall be confidential for the limited purpose of rehabilitating the student and protecting students and staff, and shall not be disseminated further by the teacher, counselor, or administrator except insofar as communication with the student, his/her parents/guardians, law enforcement personnel, and the student's probation officer is necessary to effectuate the student's rehabilitation or to protect students and staff. Unlawful dissemination of such information is a misdemeanor.**

**Any information received from the court shall be kept in a separate confidential file at the school of attendance and shall be transferred to the student's subsequent schools of attendance and maintained until the student graduates from high school, is released from juvenile court jurisdiction, or reaches the age of 18, whichever occurs first.**

**After the student graduates from high school, is released from juvenile court jurisdiction, or reaches the age of 18, the confidential record shall be destroyed.**

## **Anti-Discrimination and Harassment Policy**

**The Audeo Charter School and The Charter School of San Diego are committed to equal opportunity for all individuals in education. School programs and activities shall be free from discrimination based on sex, race, color, religion, sexual orientation, national origin, physical or mental disability or any other unlawful consideration. Audeo and CSSD shall promote programs which ensure that discriminatory practices are eliminated in all school activities and will take steps to assure that the lack of English will not be a barrier to admission and participation in school programs.**

**Any student who engages in discrimination of another student or anyone from Audeo and CSSD may be subject to disciplinary action up to and including expulsion. Any employee who permits or engages in discrimination may be subject to disciplinary action up to and including dismissal.**

**Any student or parent who feels that discrimination has occurred should immediately contact a teacher or the Executive Director at (858) 678-2042 for resolution. If not resolved, contact: The President of the Board, 10170 Huennekens Street, San Diego, CA 92121; (858) 678-2020.**

## **School-Wide Resource Center Dress Code**

**In order to establish and maintain a safe and productive environment, students are expected to wear appropriate clothing and footwear to the resource centers. Students who are not wearing appropriate clothing, parents/guardians will be notified and students will be asked to change or sent home. Unacceptable dress includes, in part, the following:**

- **Pants sagging below the waist**
- **Beachwear or sleepwear, including bedroom slippers**
- **Shorts/skirts that are above mid-thigh**
- **Tube tops, backless shirts, see-through garments, shirts that show the midriff, muscle tank tops, and clothing that would be considered revealing and/or a distraction to the learning environment**
- **Visible undergarments (including boxer shorts, bras, etc.)**
- **Clothing that promotes alcohol, drugs, tobacco, or other controlled substances**
- **Clothing that uses vulgar/profane language and/or images**
- **Head coverings such as, hats, bandanas, beanies, or do-rags**

## Going To and From Resource Center Safely

Everyday, millions of children take to the streets and roadways to get to and from school. They walk, ride their bicycles, take buses, and arrive in vehicles with one purpose — getting to and from school safely. It is important for Audeo and CSSD students to understand safety guidelines and tips to follow to ensure their safety to and from the resource center. The following safety tips are reviewed annually with Audeo and CSSD students and parents to help prepare all the students for a safer journey.

1. Every Audeo and CSSD student will have set schedule for arrival and departure from the resource center. When a student fails to arrive for their appointment and has not notified the resource center for the absence, his or her teacher will call home to ensure the student is safe.
2. Every student, parent or guest is required to sign-in and out each time they arrive and depart the resource center. Students, parents, and guests will have designated staff members to sign-in and out with.
3. All students will be given an official school issued photo identification card annually. Students will be required to keep the identification card on their person each time they travel to and from the resource center.
4. Students will be encouraged to always TAKE A FRIEND when walking or riding his or her bike to and from the resource center. Students should walk and ride in well-lit areas, and never take shortcuts. When walking and biking students should stay aware of their surroundings and observe all traffic rules in place to more safely share the roads and sidewalks with others.
5. Parents will be encouraged to walk the route to and from resource centers with their children pointing out landmarks and safe places to go if they're being followed or need help. Making a map with their students and showing acceptable routes to the resource center, using main roads, and avoiding shortcuts and isolated areas is encouraged. A map will be a good guide for students who may need help finding their way.
6. If a student takes public transportation (i.e. city bus) to and from the resource center, parents will be encouraged to visit the bus stop with their student and learn the bus number. This will avoid confusion for the student about knowing which bus to ride.
7. In the event anyone bothers a student while going to or from the resource center, students will be taught to get away from that person, and TELL a resource

center staff member, parent, or another trusted adult. If an adult approaches a student for help or directions, students will be trained that grownups needing help should not ask children for help; they should ask other adults.

8. Students will be directed that if anyone they don't know or a person who confuses, scares, or makes them feel uncomfortable offers a ride, say NO. Students should never hitchhike. Also, students should never accept a ride from anyone unless a parent has told them it is OK to do so in each instance.
9. Students will be directed that if anyone follows them on foot to get away from him or her as quickly as possible. If anyone follows them in a vehicle they should turn around, go in the other direction, and try to quickly get to a spot where a trusted adult may help them. Students will be advised to TELL a resource center staff member, parent, or another trusted adult what happened.
10. Students will be taught that if anyone tries to take them somewhere, they should quickly get away and yell, "This person is trying to take me away" or "This person is not my father/mother/guardian." If anyone tries to grab them, they will be taught to make a scene and every effort to get away by kicking, screaming, and resisting.
11. Students will be taught to never leave the resource center with anyone they don't know. They should always CHECK FIRST with a resource center staff member, parent, or another trusted adult. If anyone tells them there is an emergency and they want the student to go with them, the students should always CHECK FIRST before doing anything. Students will be taught to make sure they understand to TELL a trusted adult if they notice anyone they don't know hanging around the resource center.
12. Parents are encouraged to practice these safety tips with their student to make certain they really know and understand them. Make the walk to and from the resource center a "teachable moment" and chance to put their skills to the test.

## **Safe Ingress and Egress Procedures**

**All Audeo and CSSD staff and students shall review resource center evacuation procedures including primary/alternate routes and assembly areas, assigned responsibilities, and actions to take as posted on the resource center. If there is a need for evacuation from the resource center, the following procedures are as follows:**

- **Students and staff calmly evacuate the building to designated assembly area (alternate route if primary area is closed) as displayed on posted resource center evacuation plan**
- **Designated staff take along emergency release binder, student sign-in sheets, emergency materials specified in disaster preparedness plan**
- **Using student sign-sheets, staff verifies presence of all students and staff**
- **Staff contacts appropriate emergency units**
- **Staff keeps students in assembly area until further instructions are received from the EOT. No one shall reenter the building for any reason until official ALL CLEAR signal is given**
- **Once the ALL CLEAR is given, Learning Lead or designee reenters building to ensure that it is safe and secure**
- **Staff and students reenter building and resume instructional/administrative activities**

**If the building is not safe to reenter, the reunification procedures are required:**

- **Staff will notify parent/guardians regarding emergency situations and procedures for verification and release of students**
- **When parent/guardian or designee arrives, staff will verify identity of parent/guardian or designee based on emergency release forms**
- **Parent/Guardian will sign form verifying that student is being released to them**
- **Staff will maintain documentation to ensure accountability of all students**

## **Ensuring a Safe and Orderly Environment**

*The Audeo Charter School and The Charter School of San Diego are, and will remain, “a safe place” for students and adults.*

**Audeo and CSSD staff believe that a positive climate is required if effective teaching and learning is to take place. We expect students, assisted by their parents, to meet the appointments agreed to on the Master Agreement. We expect students to complete high- quality work at the rate of one credit per month. We will make every effort to keep parents informed about the student’s progress and behavior.**

## **Discipline Procedures**

All parents and students are asked to carefully read and sign the positive school discipline plan upon enrolling:

### **School Rules/Discipline**

- **Attend school according to the schedule on the master agreement, arrive on time and return directly home after each weekly appointment.**
- **Complete ALL assignments as scheduled.**
- **Respect the authority of ALL ADULTS at Audeo and CSSD.**

### **Severe Clause Bypasses**

A majority of students at Audeo and CSSD will maintain acceptable standards, but a small percentage will find it difficult to follow our procedures. The following offenses will require immediate action:

- **Fighting/open rebellion**
- **Possession or use of drugs or alcohol**
- **Defiance/unprovoked attack**
- **Smoking**
- **Stealing**
- **Vandalism**
- **Profanity, Vulgarity, or Obscene Acts**
- **Severely inappropriate behavior**

### **Parent Responsibilities**

#### ***Attendance***

- **Ensure that students get to their scheduled weekly appointment on time.**
- **Contact teacher if this is not possible to arrange an alternate time.**
- **Follow up to make sure your student is doing high quality work according to scheduled dates.**
- **Arrange for your student to attend appropriate tutoring sessions, seminars and field trips.**
- **Meet with staff when requested.**

### **Parents' Role in Discipline and Behavior**

Parents are expected to cooperate with school staff in maintaining and encouraging proper standards of behavior for their children. The following points may prove helpful:

- **Instill in your child a sense of responsibility for what he/she says and does.**
- **Help him/her to solve conflicts in a peaceful manner.**
- **Review your own attitude about discipline and behavior.**

- **Make sure you communicate with the school to learn necessary facts and expected behavior.**
- **As a role model for your child, show respect for learning and the necessity for completing an education.**

## Child Abuse Reporting Procedures

All Audeo and CSSD certificated teachers and staff, classified employees, and administrators are required to report suspected child abuse. An in-service, which provides awareness and training, will be given annually to Audeo and CSSD employees.

As stated in the California Penal Code, Section 11164-11174.3, "Mandated reporters shall make an initial report to the agency immediately or as soon as is practicably possible by telephone and the mandated reporter shall prepare and send, fax, or electronically submit a written follow-up report thereof within 36 hours of receiving the information concerning the incident."

A report may be done for any reason. The criterion is that a reasonable suspicion of an abuse/neglect situation either has occurred and/or exists. Each staff is a mandated reporter. A report may not receive immediate action if it is a non-emergency situation. However, it will add to the documentation should other events occur.

Discuss ALL situations at the time of occurrence with the Administrator of Instructional Services or designee.

If it is unsafe for the student to leave/go home, please call the local police department for further assistance and instructions.

**If the staff and/or student(s) are threatened or in danger, call 911.**

### Instructions for filing a Suspected Child Abuse Report

1. Call the Child Abuse Hotline first (1-800-344-6000) to make a verbal report to the agency immediately or as soon as is practicably possible by telephone. Please be sure to get the name of the hotline worker. Within 36 hours after providing verbal report, follow up with a written or faxed report.
2. The correct form for either the written or fax report is DOJ SS8572. This form may be downloaded from the California Attorney General's Web site at [www.ag.ca.gov/childabuse/pdf/ss\\_8572.pdf](http://www.ag.ca.gov/childabuse/pdf/ss_8572.pdf) or obtain a copy from the School Nurse or Administrator of Instructional Services.
3. Please complete every space on the SS8572 form. If you do not know certain requested information, write unknown.
4. Please type or print legibly in black ink to avoid a time-consuming callback.

5. "Narrative" -Please give detailed information. If you have additional information beyond what you have given by phone, please indicate this on the written report. If necessary, please continue your narrative on an additional sheet of paper, identifying the minor and indicating it is page 2 of the referral.

#### **Distribution of Fax SS8572 Form After Hotline Call Has Been Placed**

***Note: the fax machines are only available from 8:00 a.m. until 5:00 p.m., Monday through Friday.***

1. Fax form to Child Abuse Hotline (858) 467-0412
2. Send the original to Administrator of Instructional Services to place in a confidential locked file.

**OR**

#### **Distribution of Written SS8572 Form After Hotline Call Has Been Placed**

1. Original to Child Abuse Hotline, 6950 Levant St., San Diego, CA 92111
2. Send a copy to the Administrator of Instructional Services to place in a confidential locked file.

***NOTE: Suspected Child Abuse Reports are never placed in the student's cumulative record or documented in the student's health record.***

#### **Reporting Responsibilities**

- No child care custodian or health practitioner reporting a suspected instance of child abuse in good faith shall be civilly or criminally liable for any report required or authorized by this article (California Penal Code Article 2.5). Any other person reporting an instance of child abuse shall not incur civil or criminal liability as a result of any report authorized by this section unless it can be proved that a false report was made and the person knew or should have known that the report was false.
- Any child care custodian, health practitioner, or employee of the child protective agency (CPS) who has knowledge of or has observed a child in his or her professional capacity or within the scope of his other employment whom he or she reasonably suspects has been the victim of child abuse shall report such suspected instance of child abuse to a child protective agency immediately or as soon as practically possible by telephone and shall prepare and send a written

**report or fax report thereof within 36 hours of receiving the information concerning the incident.**

- **Any child care custodian, health practitioner, or employee of a child protective agency who has knowledge of or who reasonably suspects that mental suffering has been inflicted on a child or its emotional well-being is endangered in any other way, may report such suspected instances of child abuse to a child protective agency. Infliction of willful and unjustifiable mental suffering must be reported.**

# SECTION THREE—EMERGENCY PROCEDURES

## Evacuation Procedure

### Notification

The Incident Commander is responsible to notify the Incident Command Team when an evacuation is necessary. The Safety Ambassador, in coordination with the Incident Commander is responsible for activating the evacuation notification procedures for RC-level personnel. Additional information pertaining to RC evacuations can be found in Emergency Procedures.

The signal for evacuation is: short interrupted blast.

If the primary emergency notification system fails to activate, the secondary notification method will be handheld air horns found in the Emergency Disaster Kit.

If evacuation is required, but an alternative method of notification is required (e.g. a received credible bomb threat), then notification can be made by telephone, radio or runners. This method reduces the level of anxiety and potential panic.

### Exiting Buildings

The Incident Commander is responsible for ensuring that staff and students are aware of designated exit routes from the building. Appropriate maps and directions are posted near each door to ensure that occupants are aware of the possible exits. Each RC and department have developed plans for ensuring that all staff/students receive evacuation notification and are moved to a pre-designated evacuation area. All staff will be trained to conduct rapid visual and verbal “sweeps” of their assigned areas to ensure that no one is left behind.

The responsibility to ensure maps and directions are posted, as well as appropriate training delivered, belongs to the following individuals:

Primary: Incident Commander

Alternate: Operations Chief

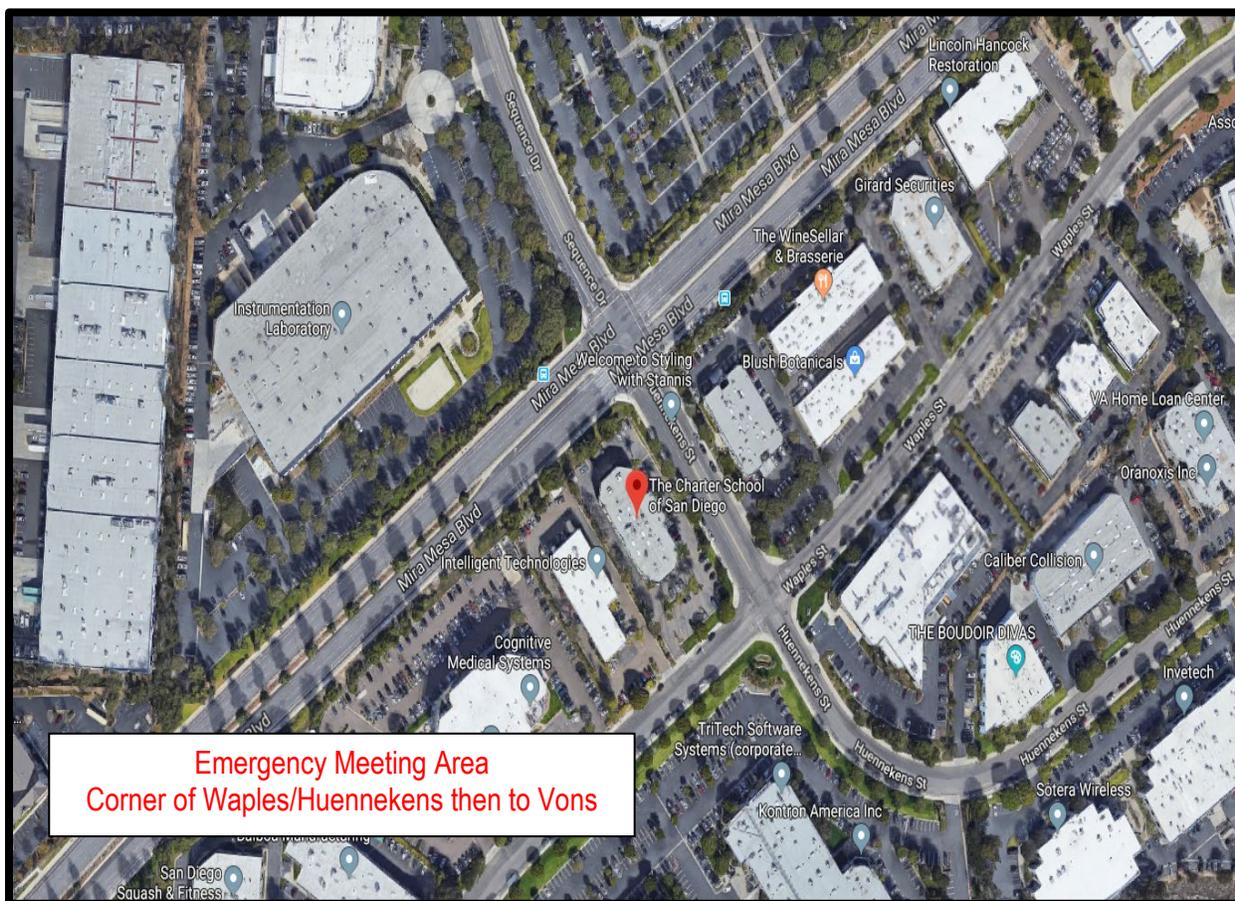
### Evacuation Locations

In the event that the situation requires a further distance be placed between individuals and the facility, the Incident Commander will direct individuals to proceed to the designated emergency meeting area.

**Sorrento Mesa Corporate Office:** 10170 Huennekens Street, san Diego, CA 92121

**Cross Street:** Corner of Mira Mesa Blvd and Huennekens Street

**Emergency Meeting Area:** Corner of Waples and Huennekens then to Vons







**Old Town Service Center:  
92110**

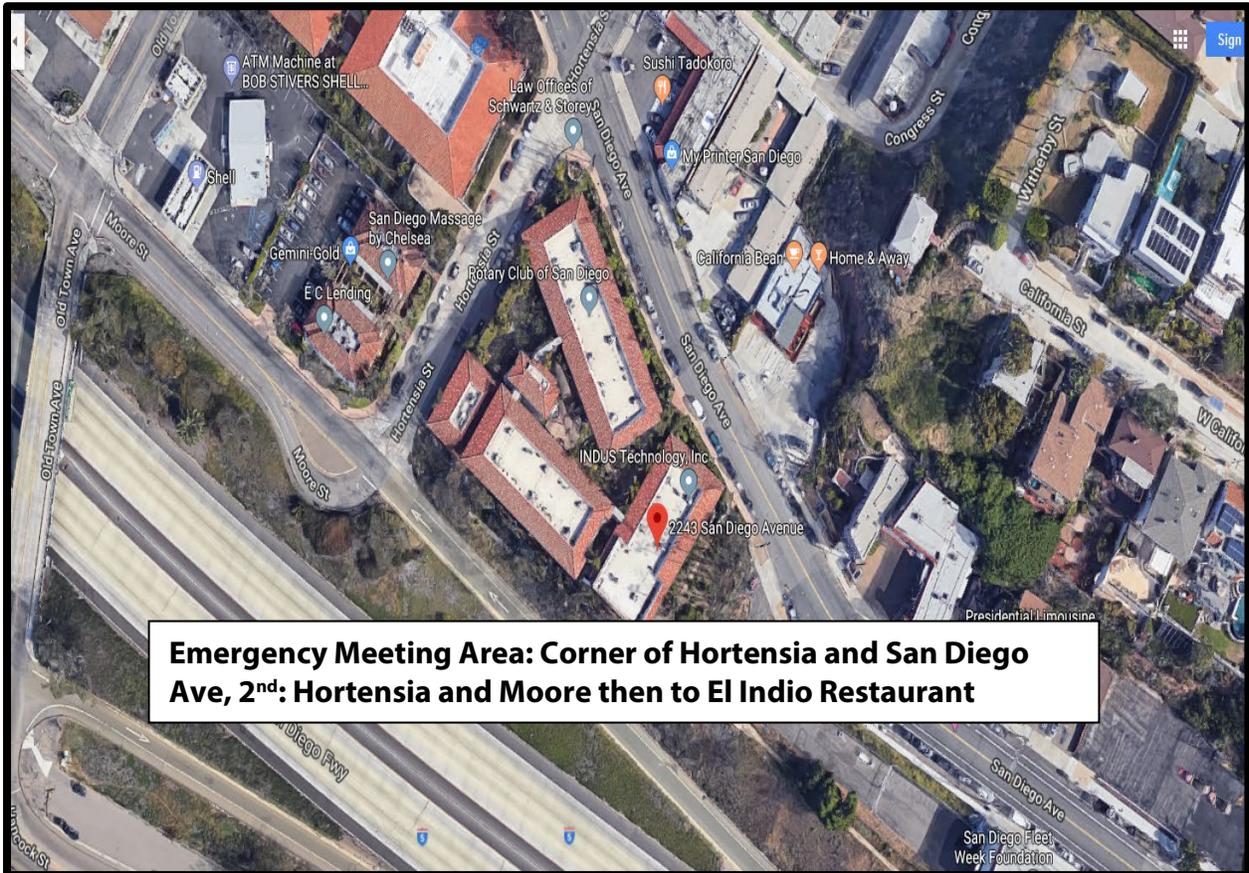
**2243 San Diego Avenue, Ste. 115, San Diego, CA**

**Cross Street:**

**Hortensia St. Corner San Diego Avenue**

**Emergency Meeting Area:**

**Corner of Hortensia and San Diego Avenue; 2<sup>nd</sup>:  
Hortensia and Moore then to El Indio Restaurant Off  
Washington Street Exit**



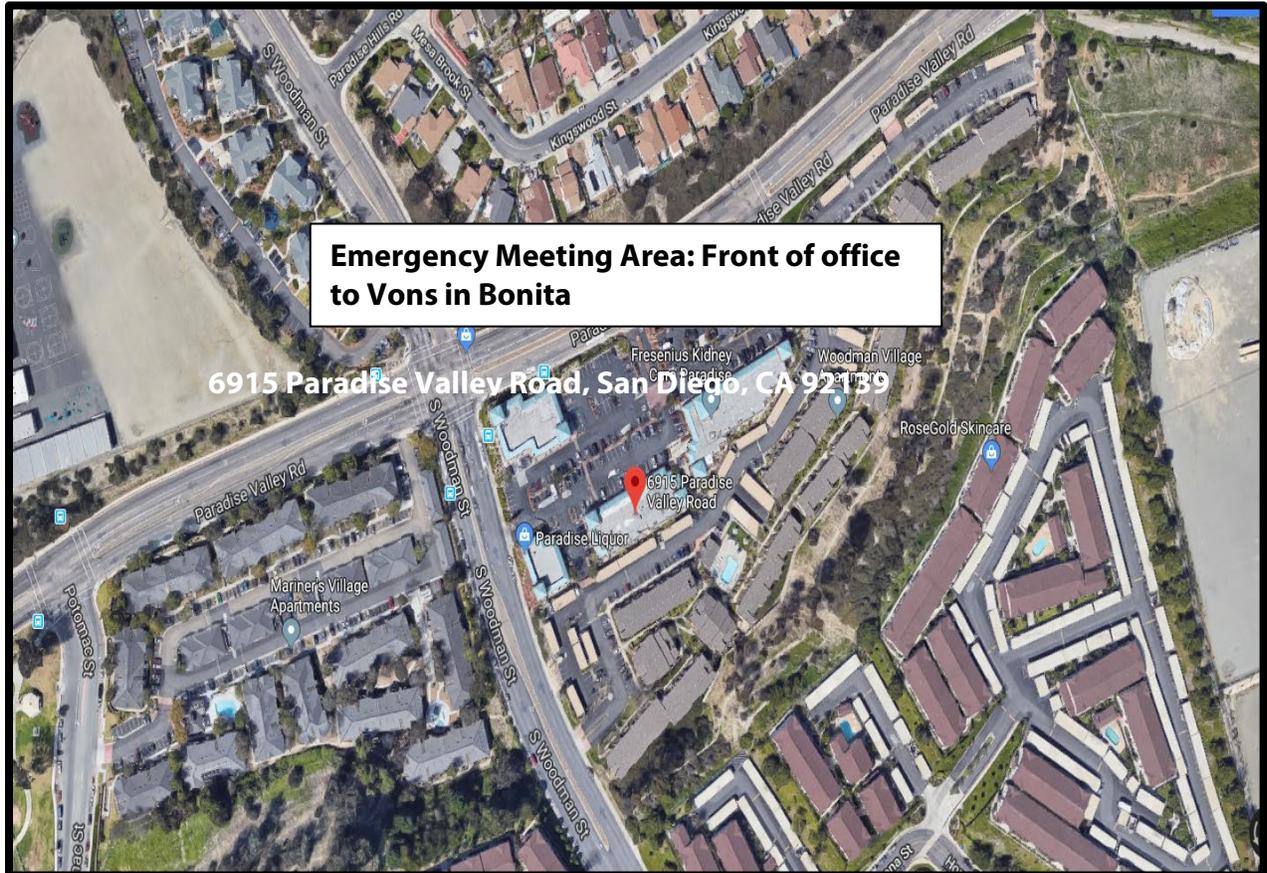
# Old Town Plan



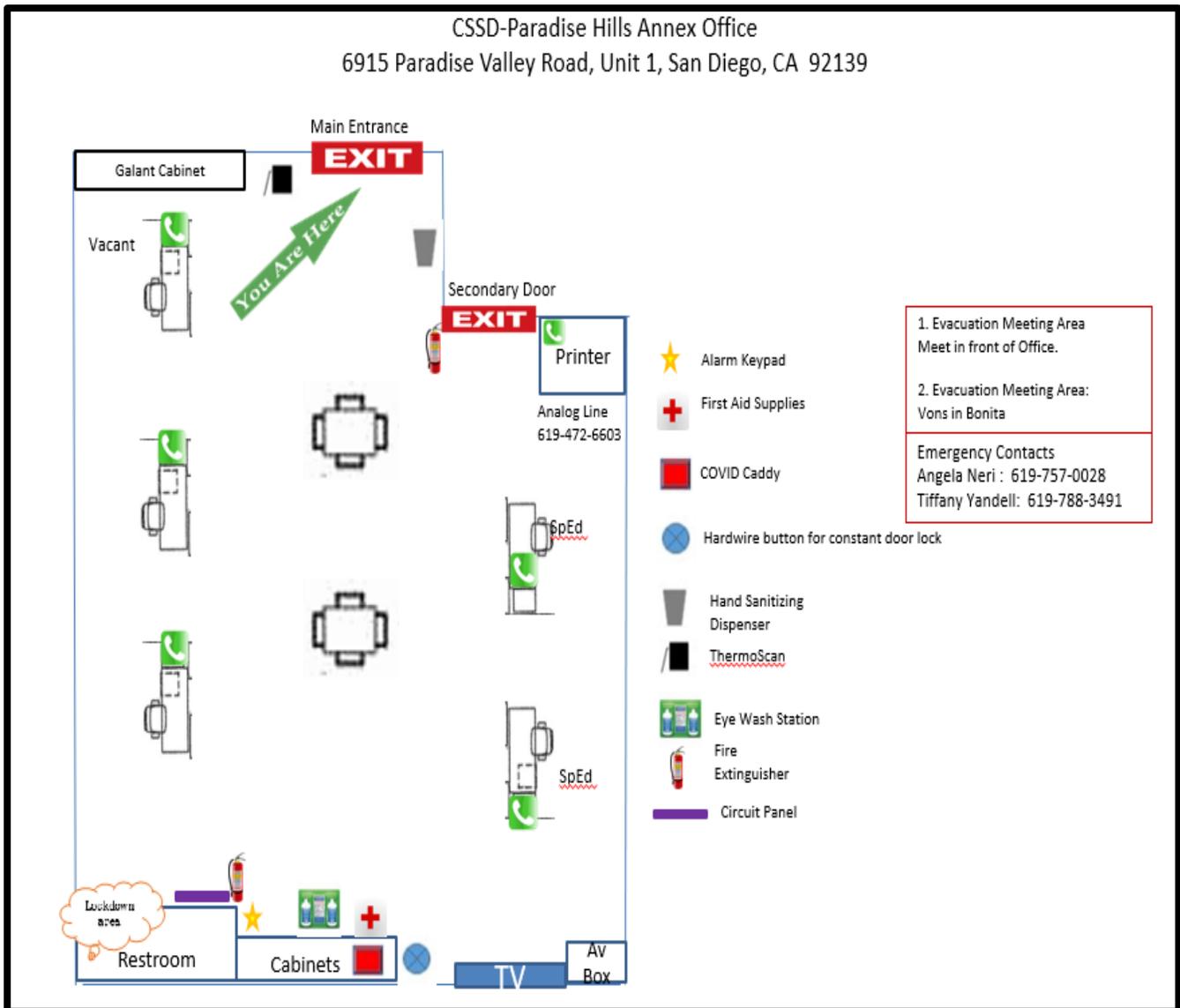
**Paradise Hills Annex Office:** 6915 Paradise Valley Road, Unit 1, San Diego, CA 92139

**Cross Street:** Woodman St.

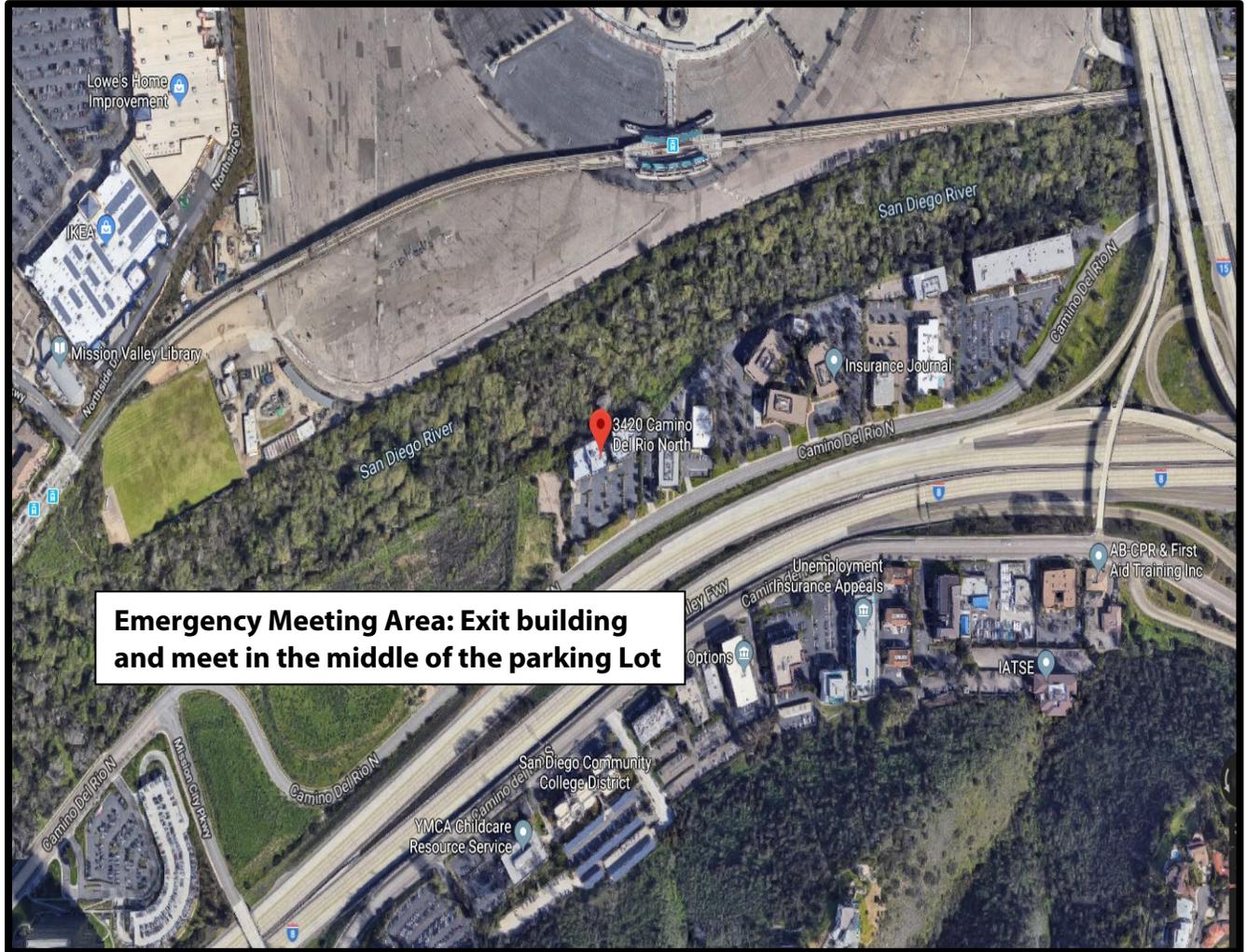
**Emergency Meeting Area:** Front of office to Vons in Bonita



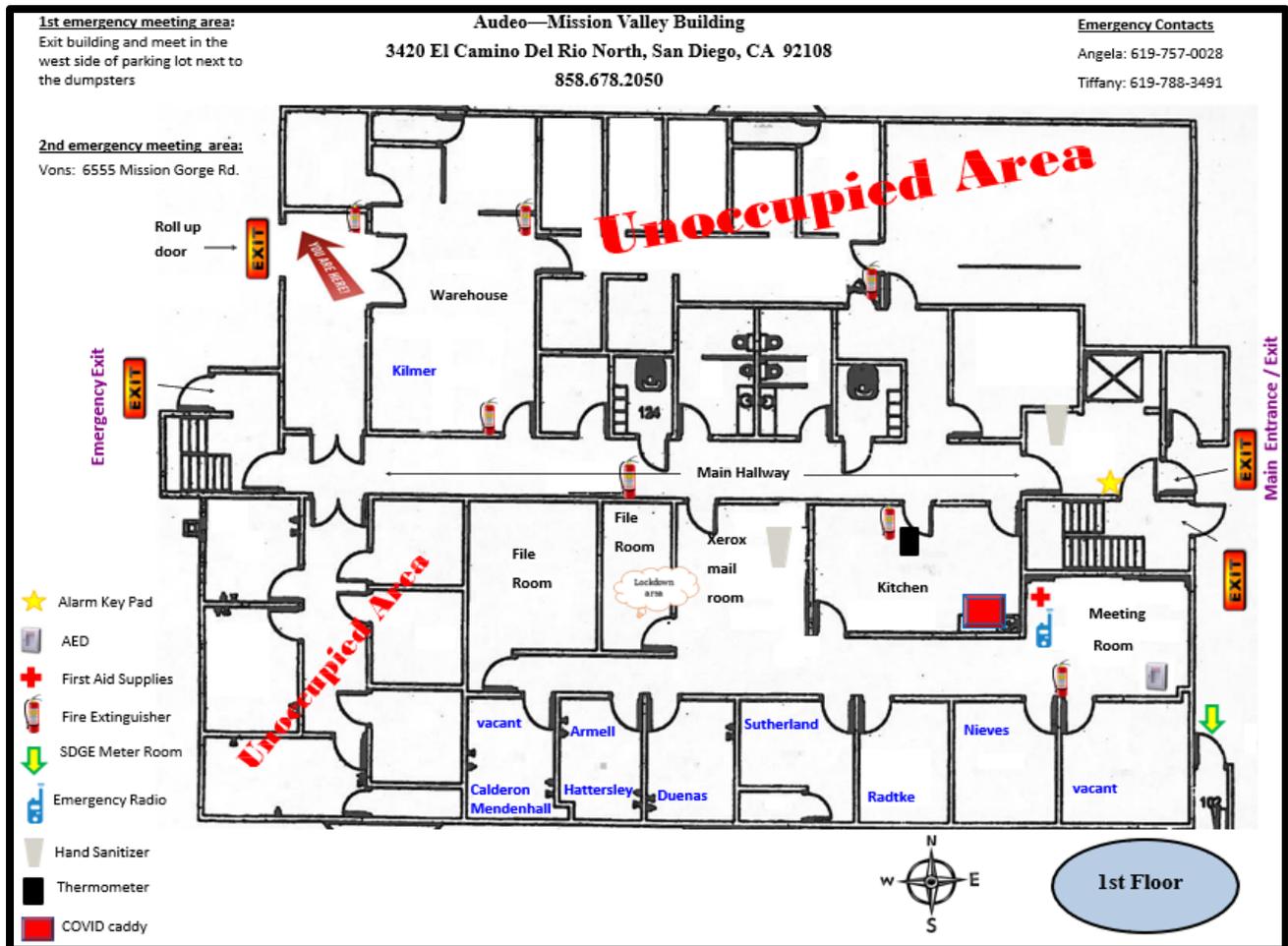
### Paradise Hills Annex Office Plan



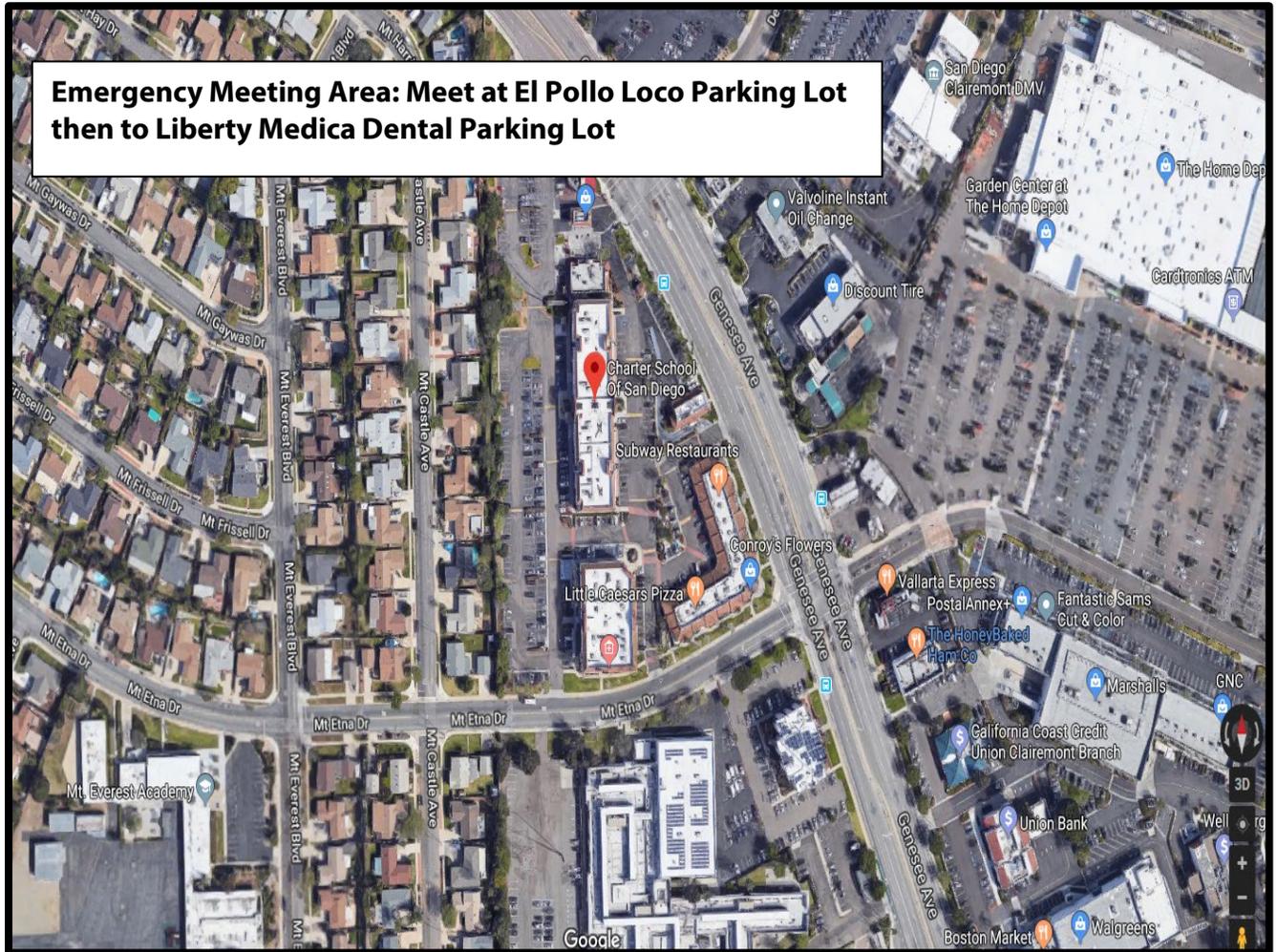
**Mission Valley West Building:** 3420 El Camino Del Rio North, San Diego, CA 92108  
**Cross Street:** Mission City Parkway  
**Emergency Meeting Area:** Middle of the parking lot



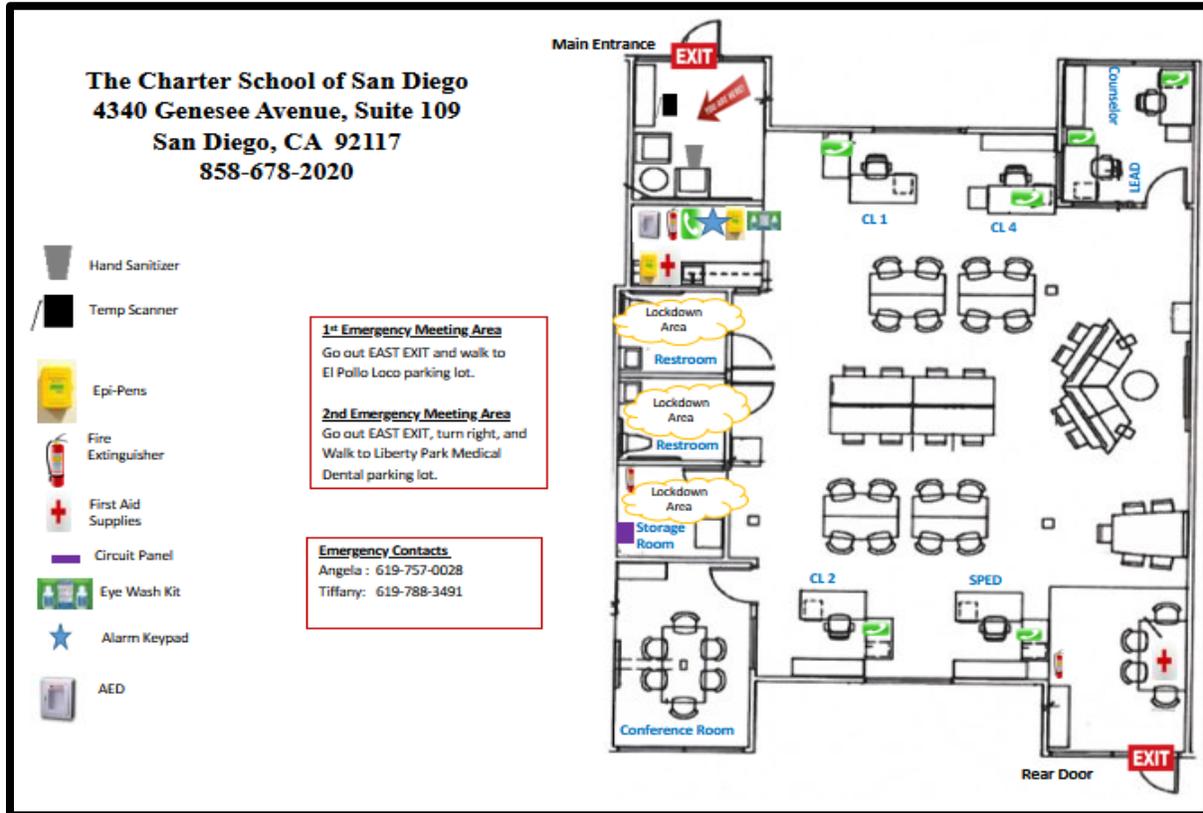
# Mission Valley West Building Plan



**Clairemont Resource Center: 4340 Genesee Ave., Ste. 109, San Diego, CA 92117**  
**Cross Street: Corner of Genesee Avenue and Mt. Etna Drive**  
**Emergency Meeting Area: Meet at El Pollo Loco Parking Lot then Liberty Medica Dental Parking Lot**



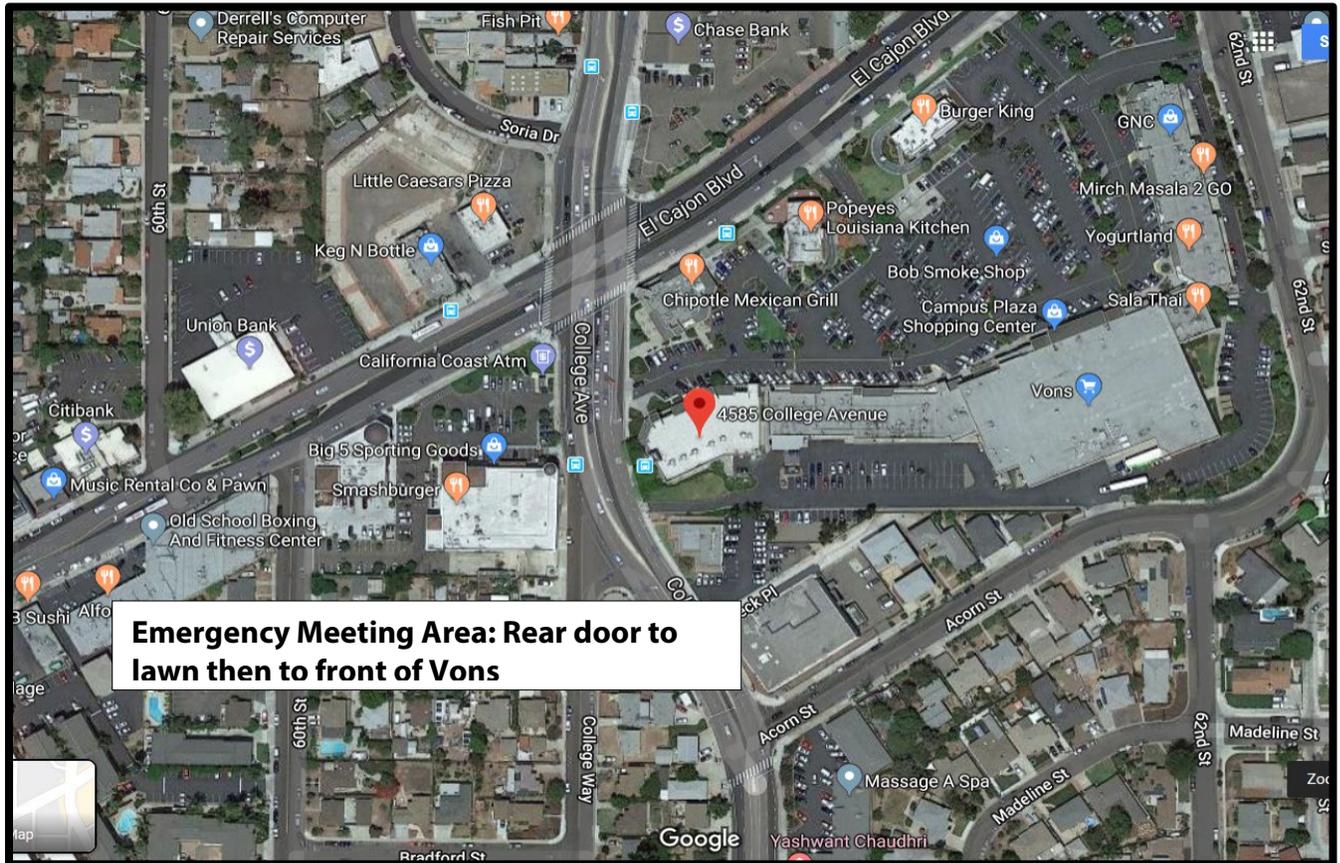
# Clairemont Resource Center Plan



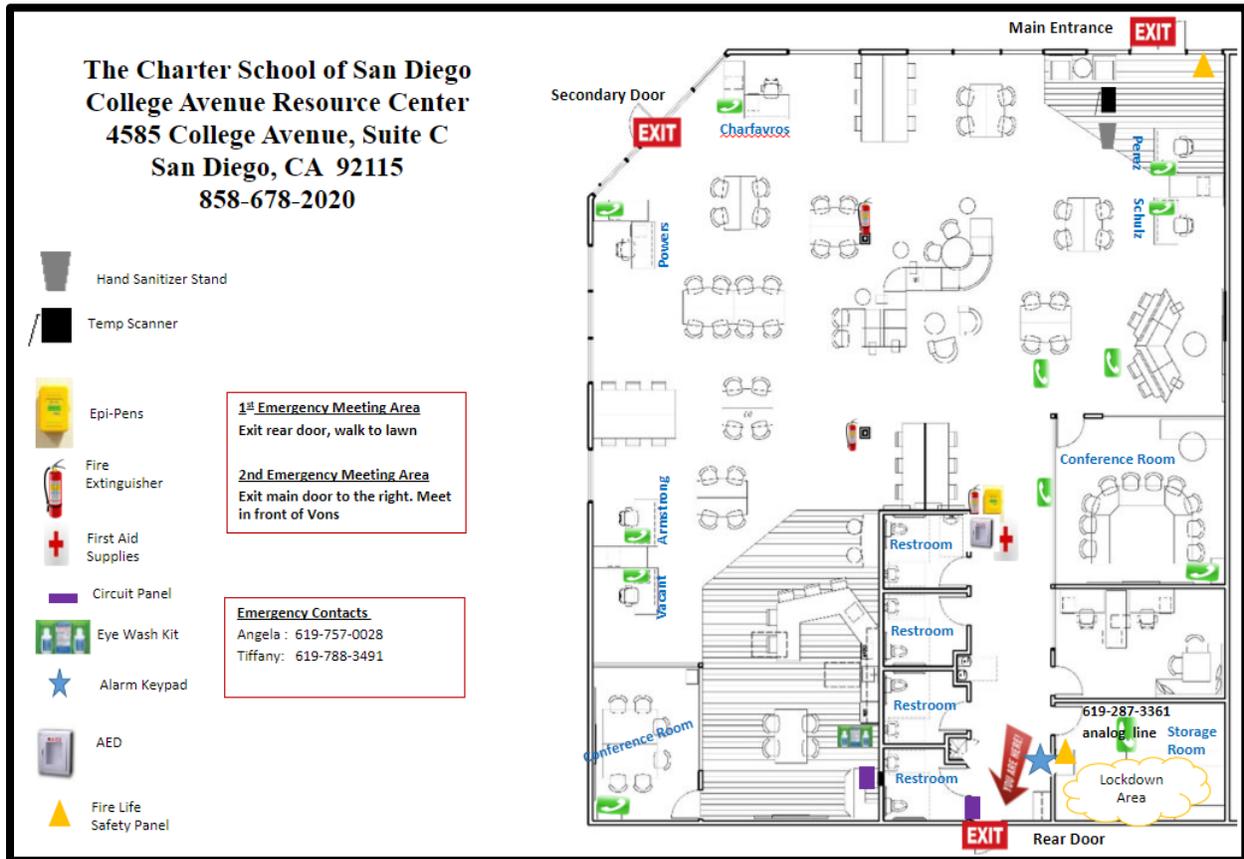
**College Avenue Resource Center: 4585 College Ave., Stes. C1 & C2 San Diego, CA 92115**

**Cross Street: El Cajon Blvd.**

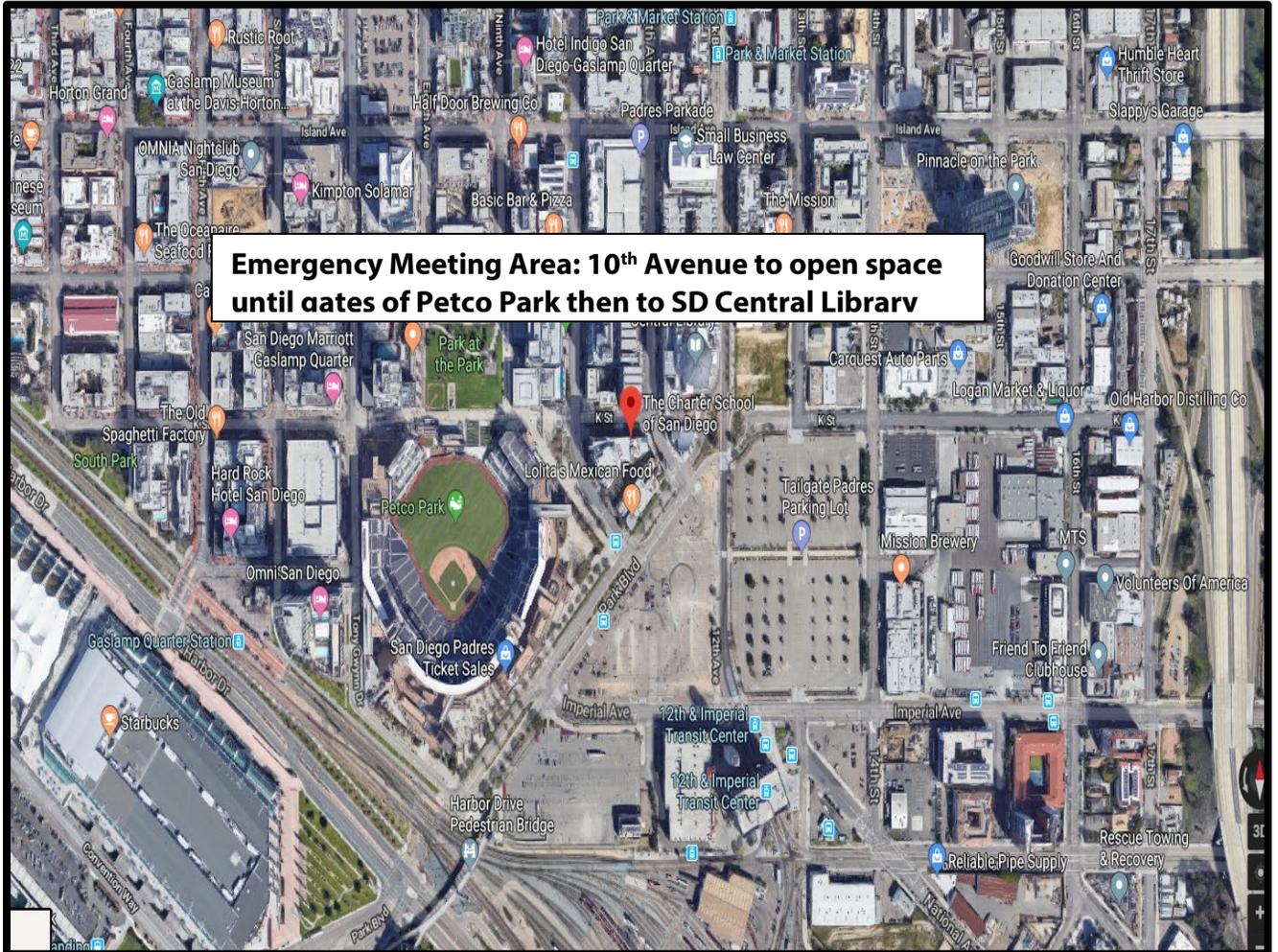
**Emergency Meeting Area: Rear Door to Lawn then to Front of Vons**



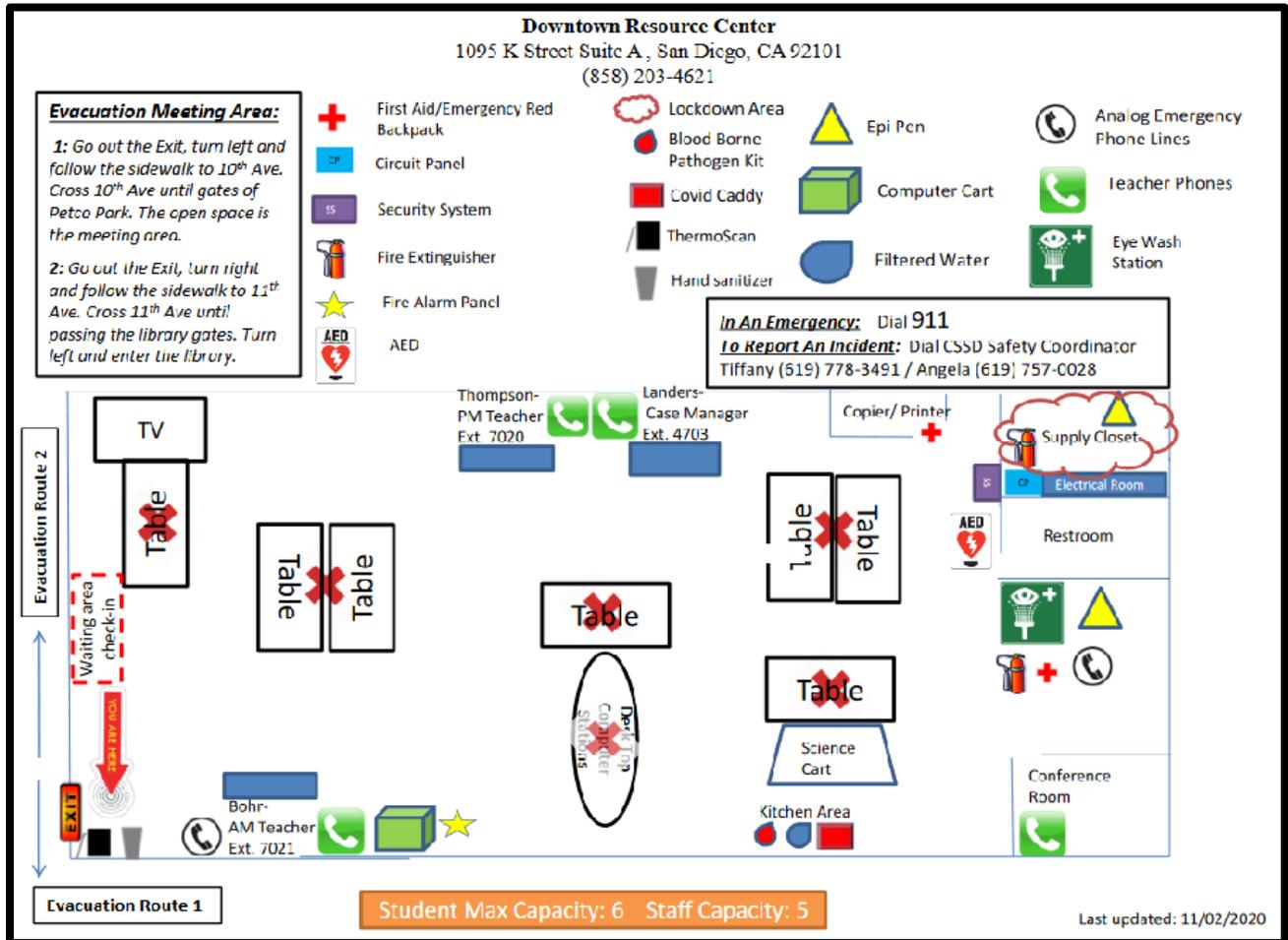
# College Avenue Resource Center Plan



**Downtown Resource Center:** 1095 K Street, Suite A, San Diego, CA 92101  
**Cross Street:** 11<sup>th</sup> Street  
**Emergency Meeting Area:** 10<sup>th</sup> Avenue to open space until gates of Petco Park then to the San Diego Central Library



# Downtown Resource Center Plan

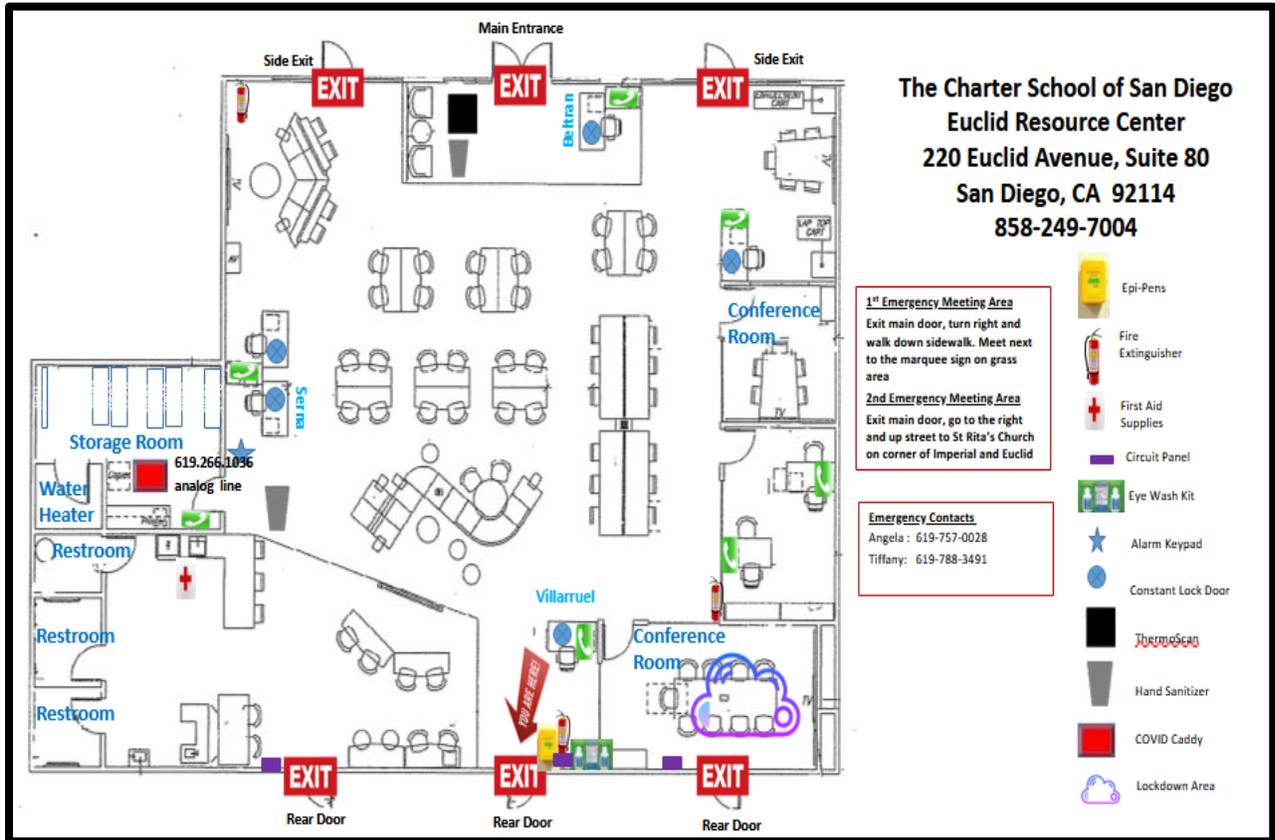


**Euclid Resource Center:  
Cross Street:  
Emergency Meeting Area:**

**220 Euclid Avenue, Suite 80, San Diego, CA 92114  
Imperial Avenue  
Meet next to marquee on grass area to St. Rita's  
Church, corner of Imperial Avenue**



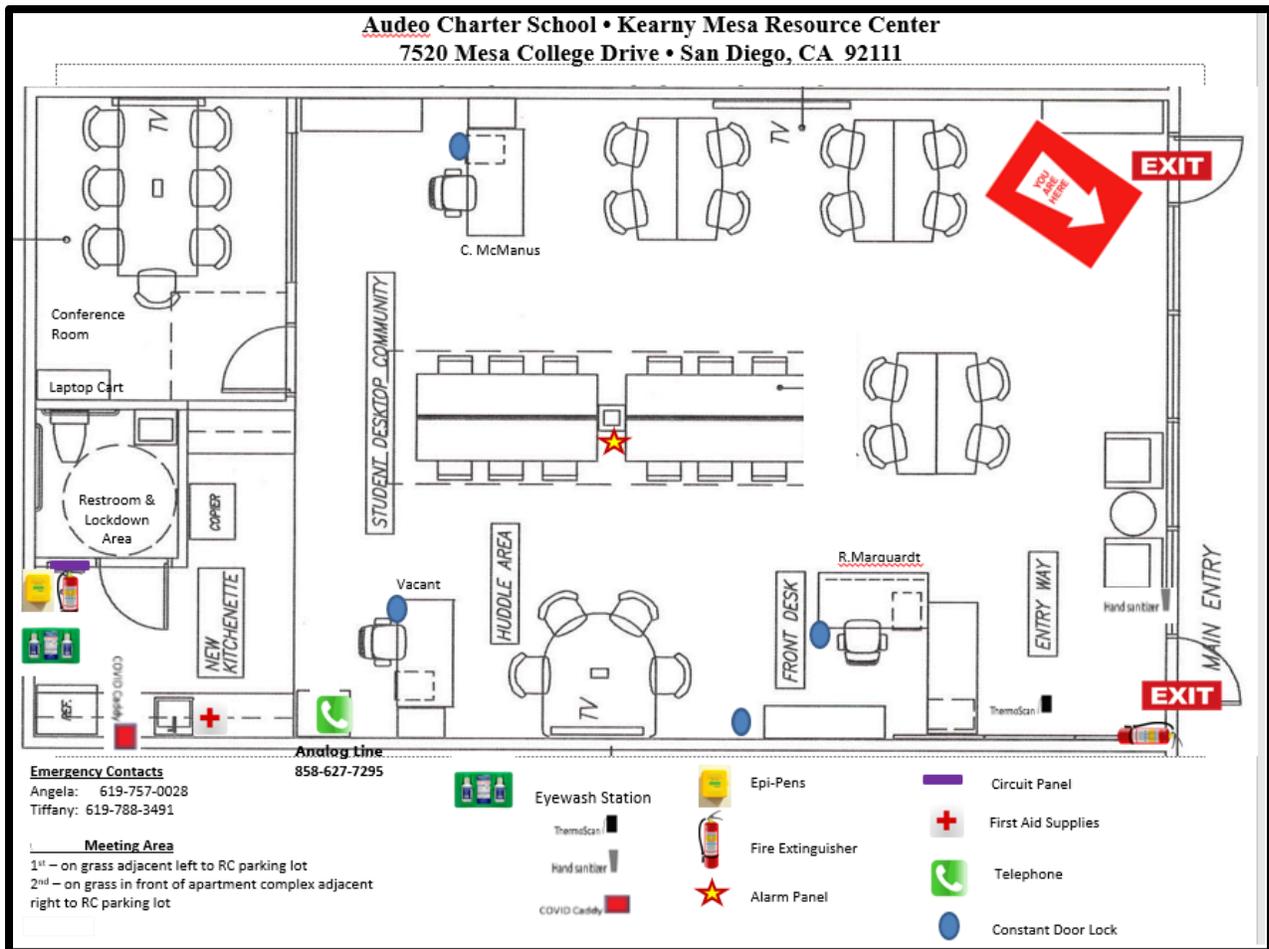
# Euclid Resource Center Plan



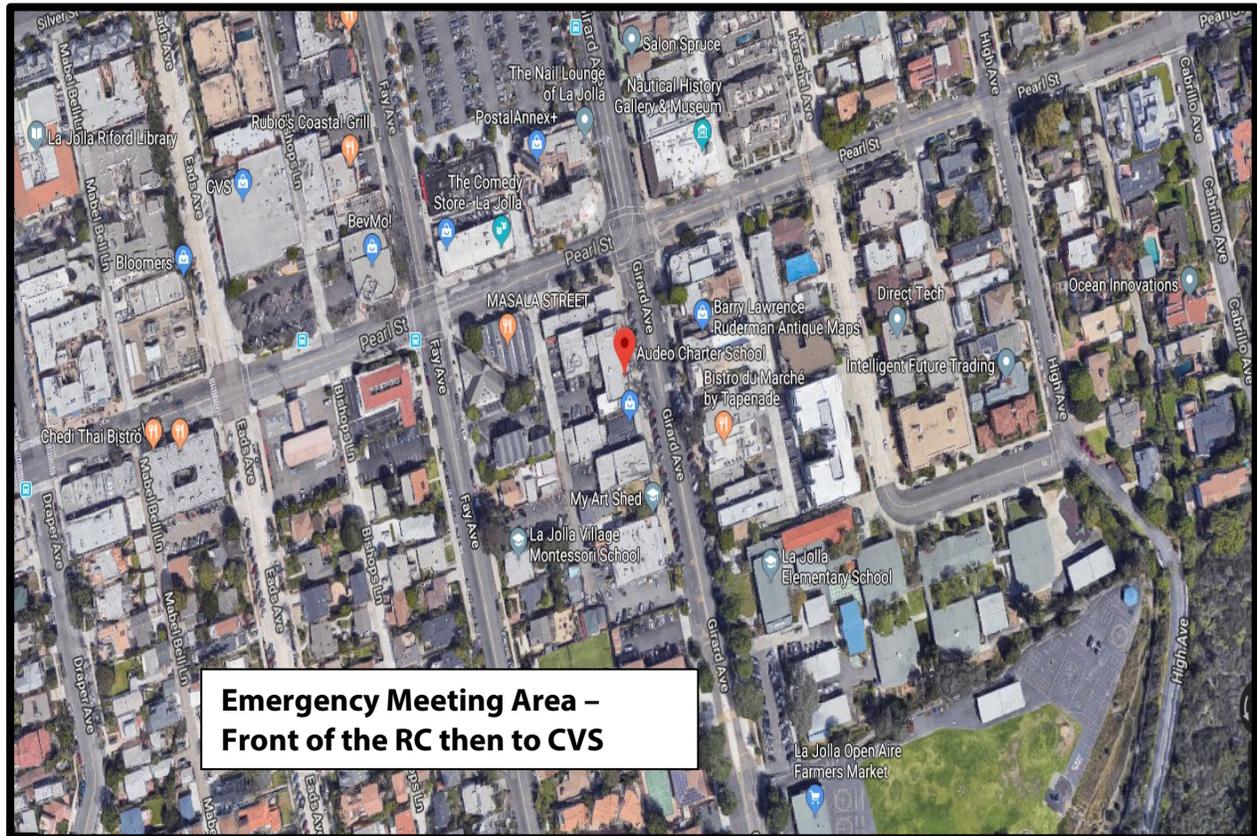
**Kearny Mesa Resource Center: 7520 Mesa College Drive, San Diego, CA 92111**  
**Cross Street: Ashford Street**  
**Emergency Meeting Area: Grass adjacent to Parking Lot**



# Kearny Mesa Resource Center Plan



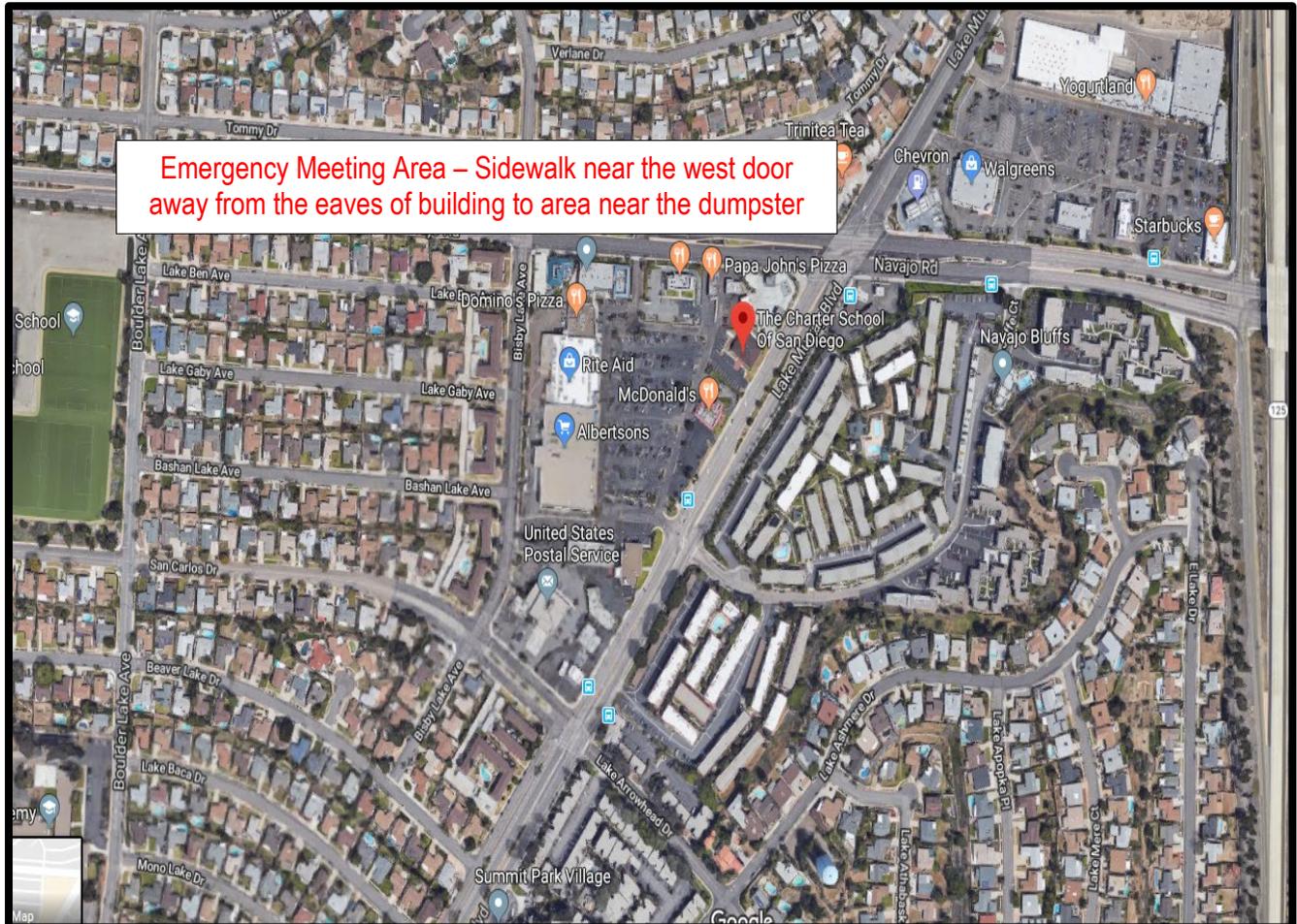
**La Jolla Resource Center: 7458 (7456) Girard Avenue, La Jolla, CA 92037**  
**Cross Street: Pearl Street & Drury Lane**  
**Emergency Meeting Area: Front of the RC then to CVS**



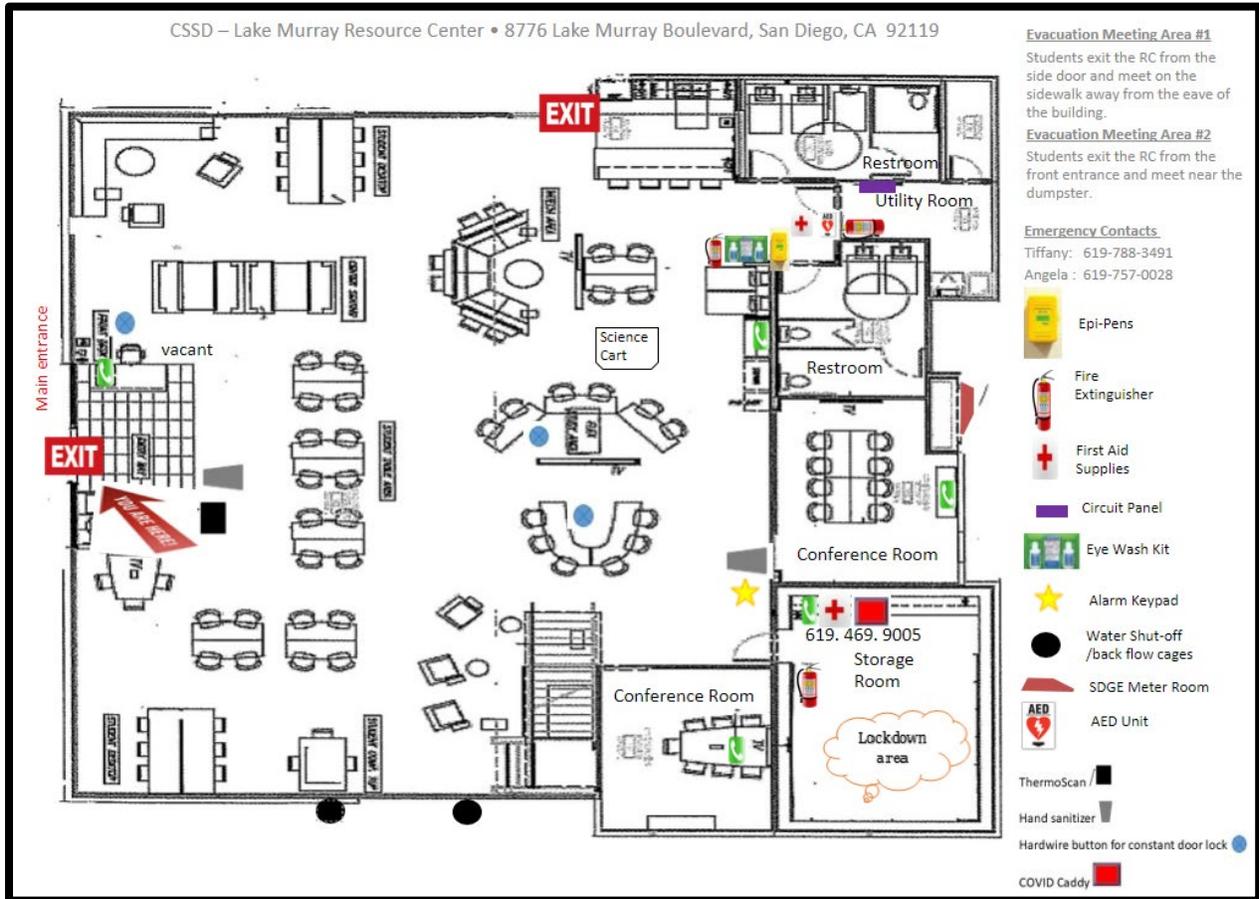
# La Jolla Resource Center Plan



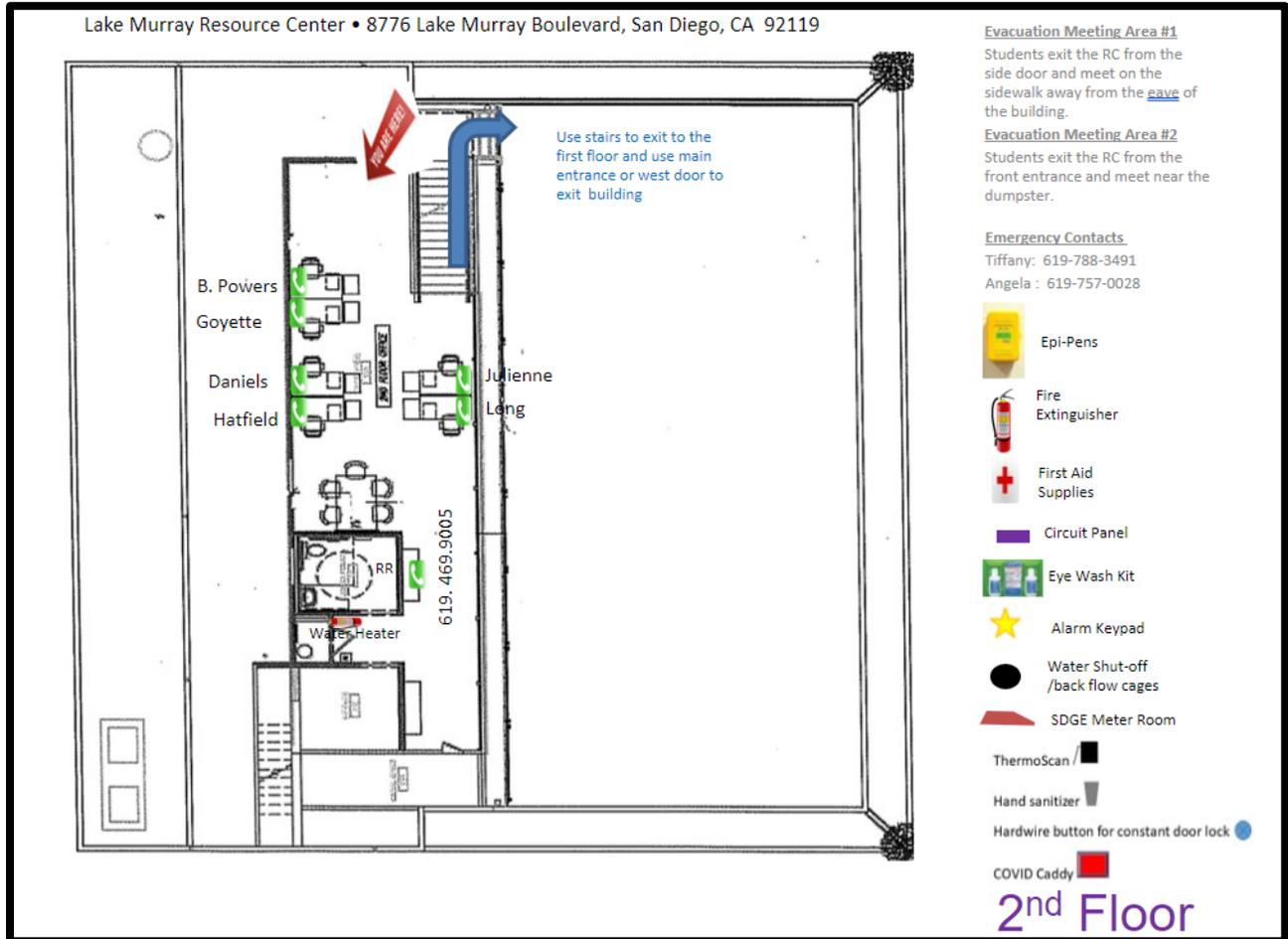
**Lake Murray Resource Center: 8776 Lake Murray Blvd., San Diego, CA 92119**  
**Cross Street: Navajo Road**  
**Emergency Meeting Area: Sidewalk near the west door away from the eaves of the building to area near the dumpster**



# Lake Murray Resource Center Plan—First Floor



## Lake Murray Resource Center Plan—Second Floor

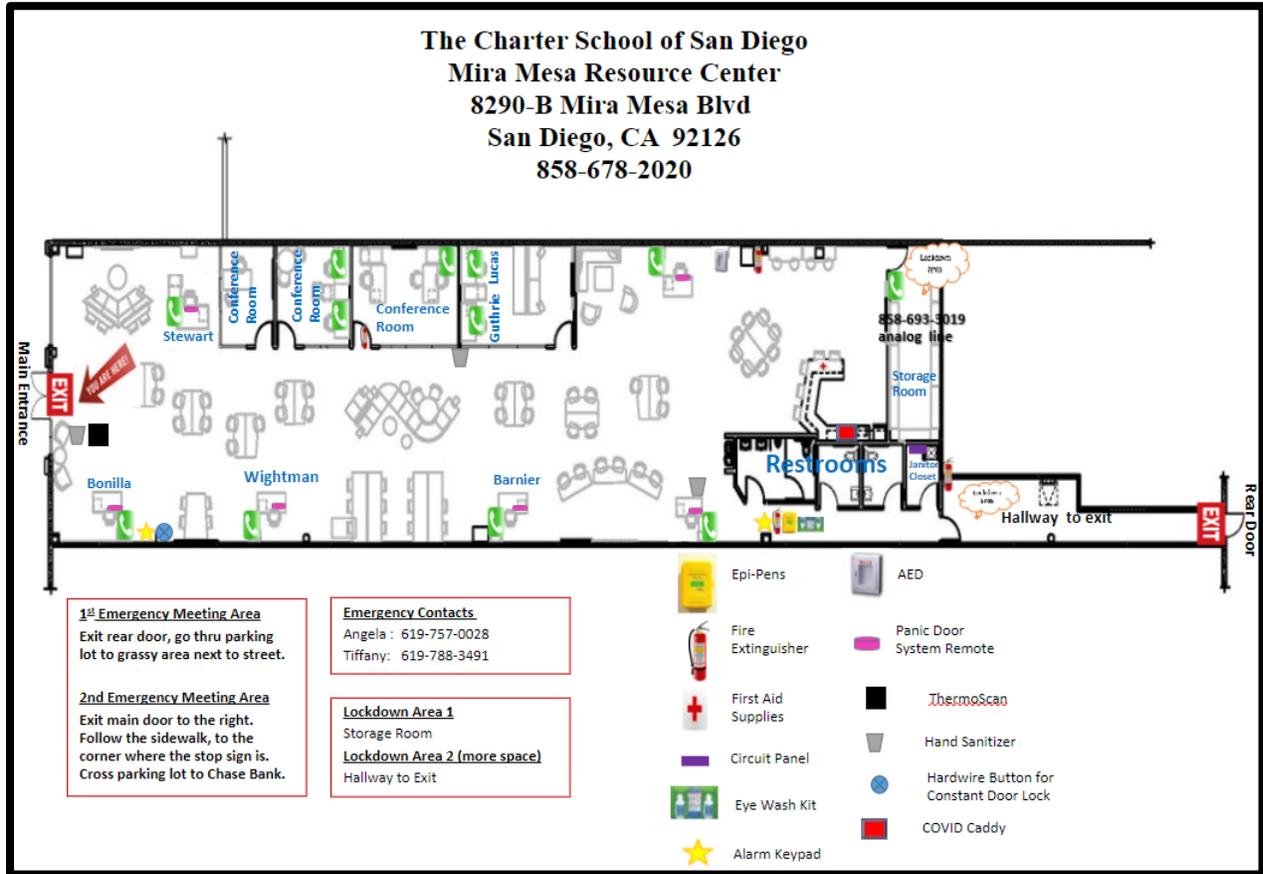


**Mira Mesa Resource Center:  
Cross Street:  
Emergency Meeting Area:**

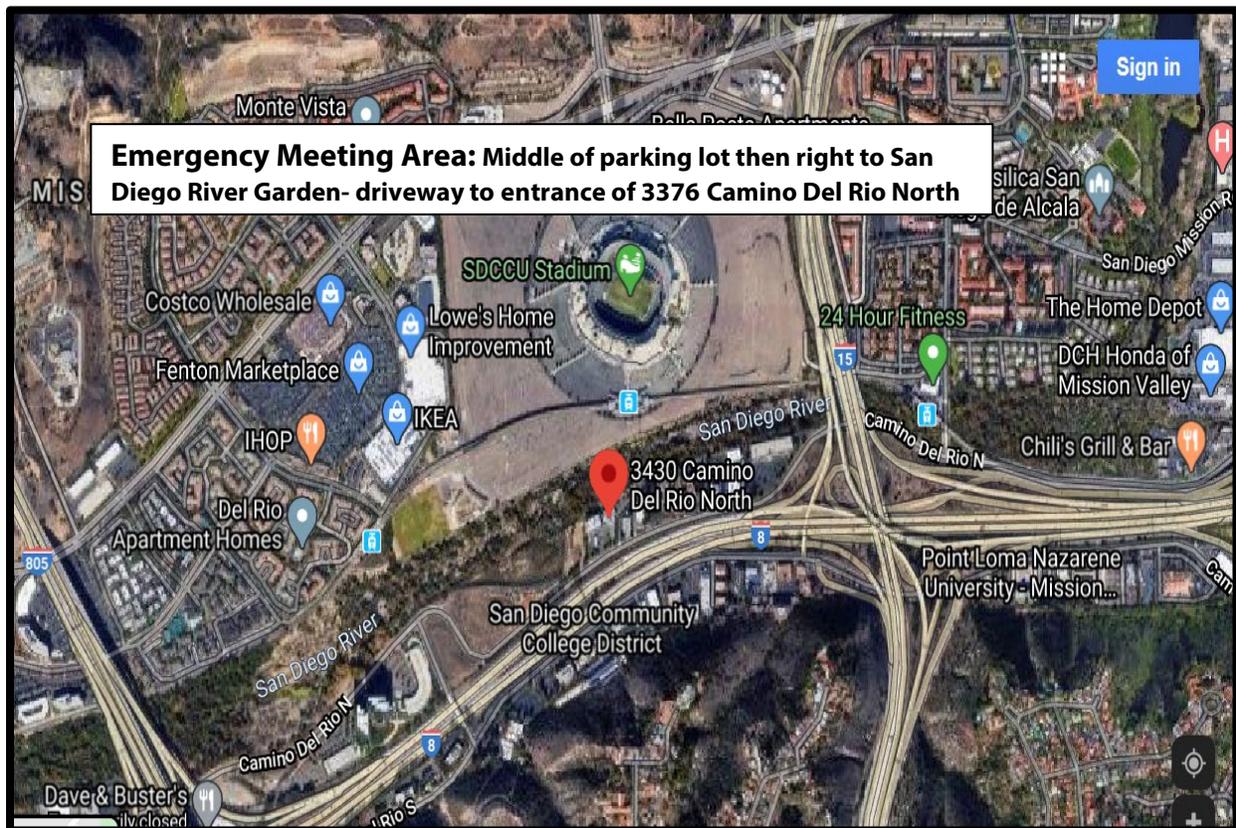
**8290-B Mira Mesa Blvd., Unit 23, San Diego, CA 92126  
In Mira Mesa Mall Across Vons, beside Petco Store  
First- Exit rear door to grassy area; Second – Cross  
parking lot to Chase Bank**



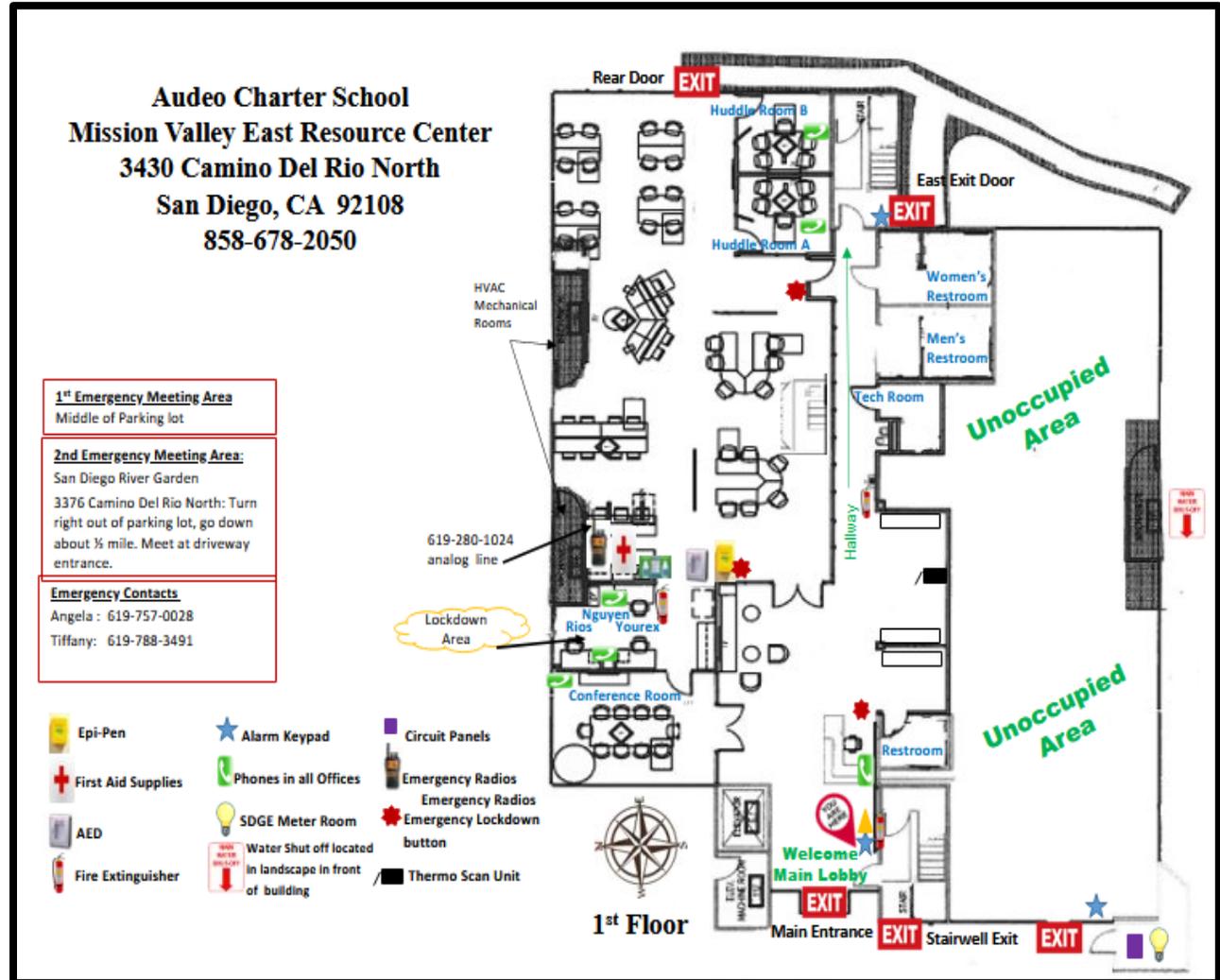
# Mira Mesa Resource Center Plan



**Mission Valley Resource Center: 3430 Camino Del Rio North, San Diego, CA 92108**  
**Cross Street: Camino Del Rio North and Mission City Parkway**  
**Emergency Meeting Area: Middle of parking lot then right to San Diego River Garden- driveway to entrance of 3376 Camino Del Rio North**



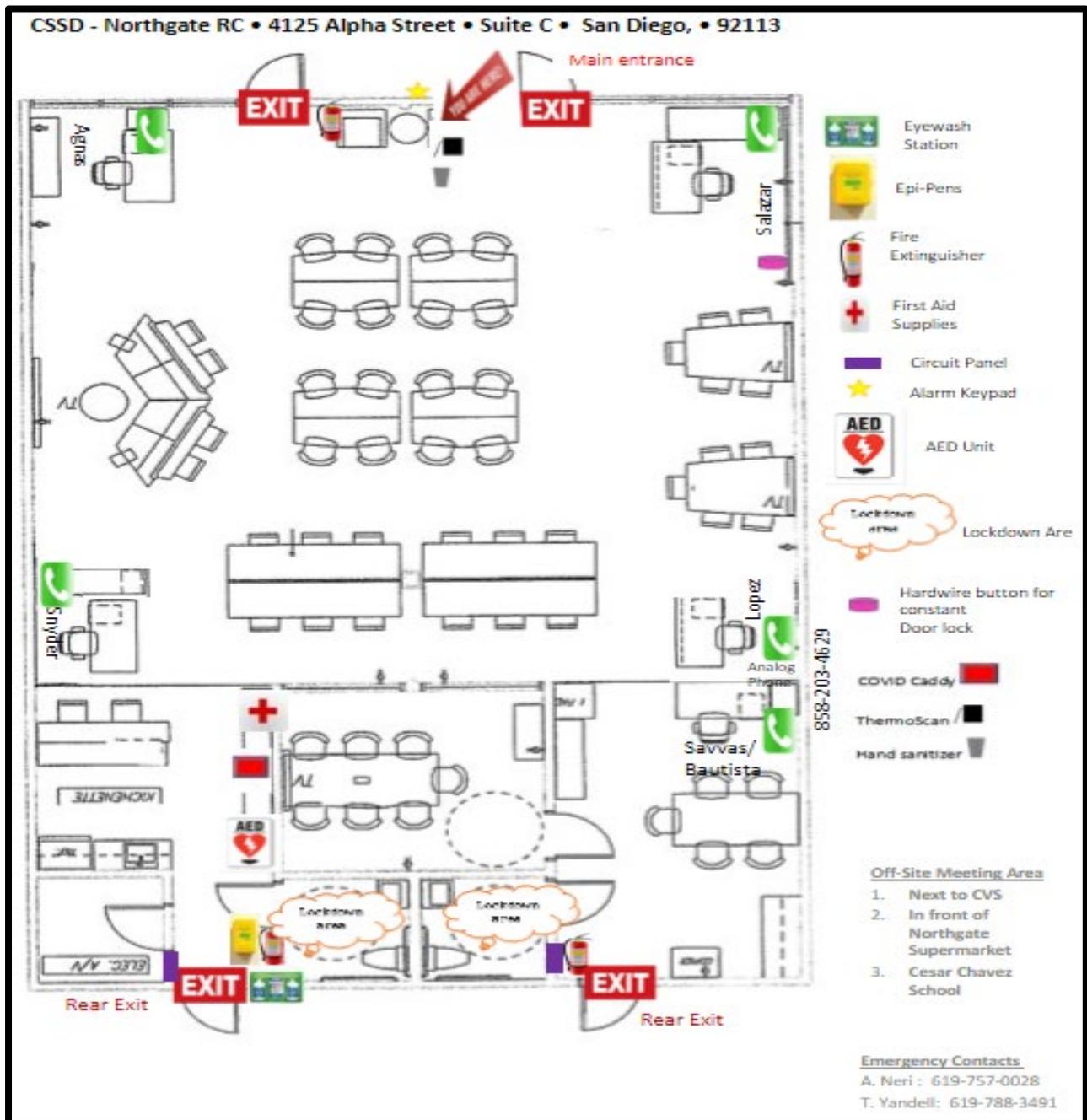
# Mission Valley Resource Center Plan



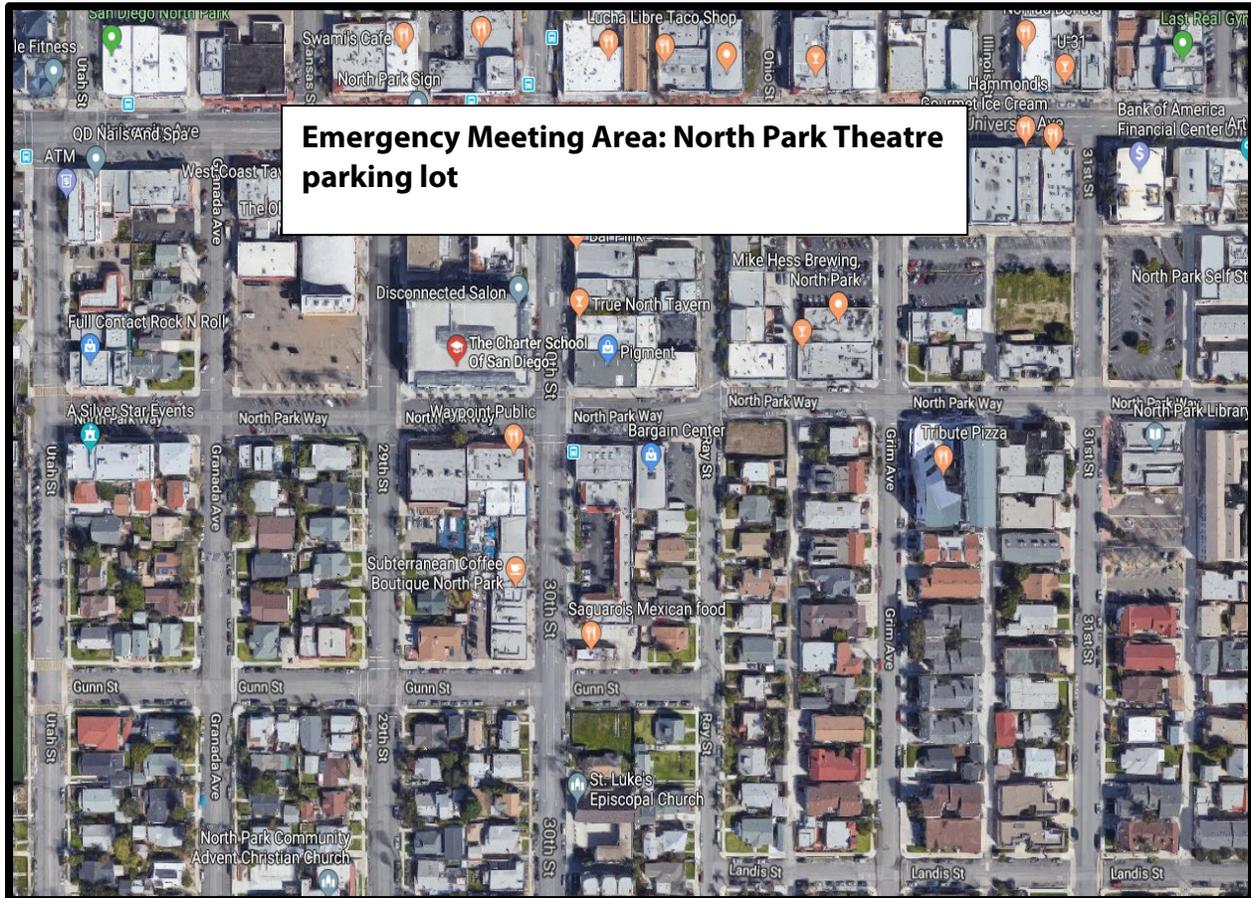
**Northgate Resource Center:** 4125 Alpha Street, Suite C-D, San Diego, CA 92113  
**Cross Street:** Alpha Street and S 41<sup>st</sup> Street  
**Emergency Meeting Area:** Next to CVS then in front of Northgate Supermarket then to Cesar Chavez School



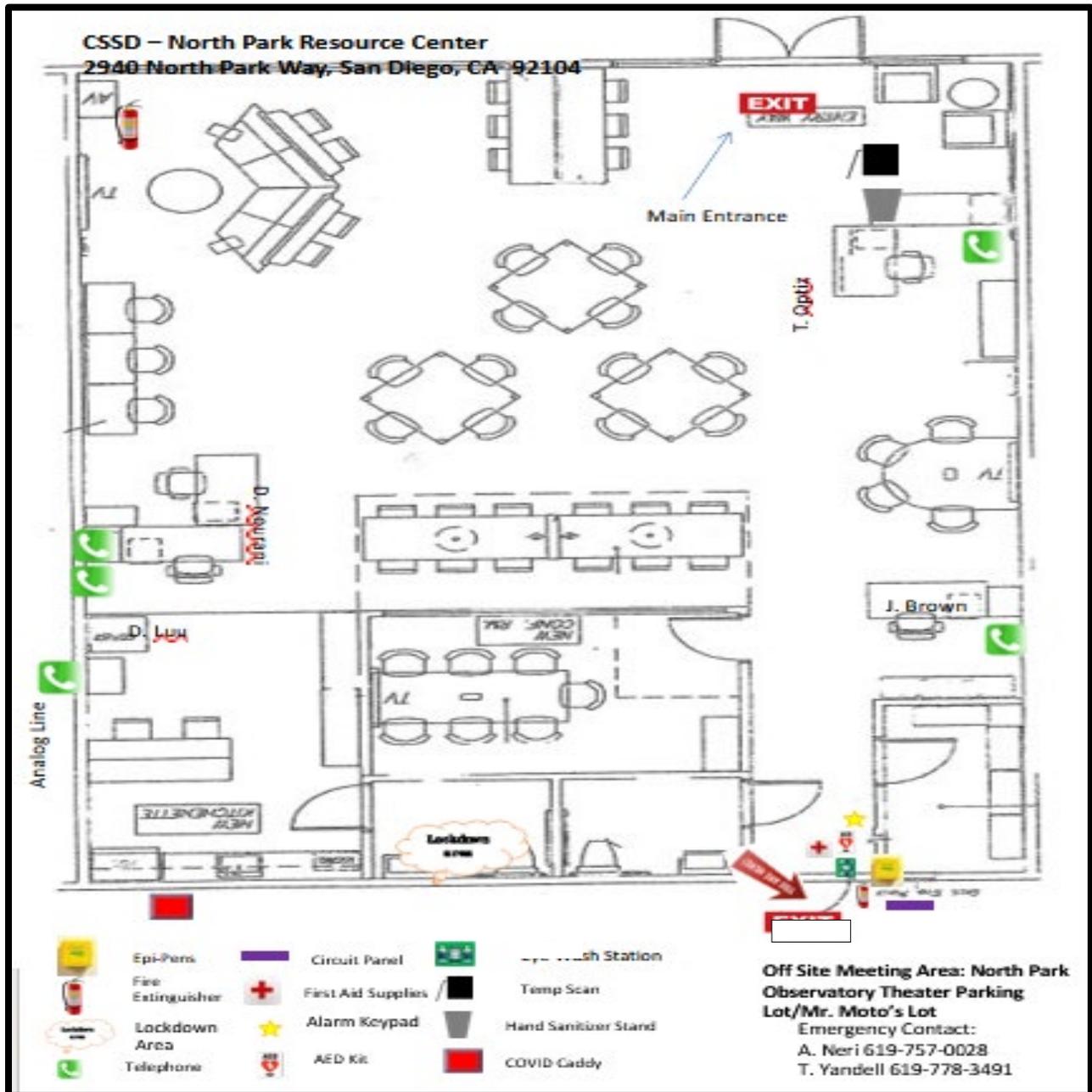
# Northgate Resource Center Plan



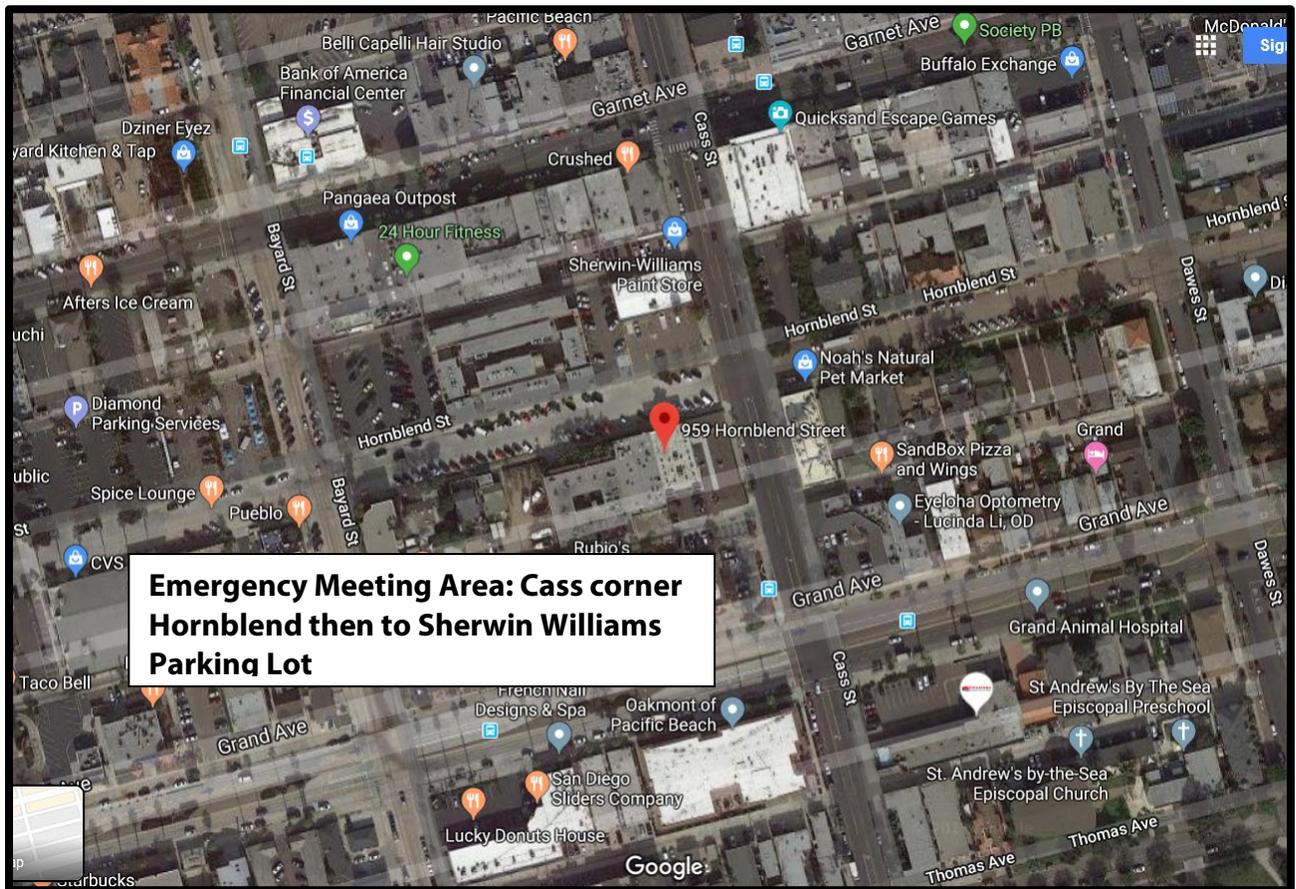
**North Park Resource Center: 2940 North Park Way, San Diego, CA 92104**  
**Cross Street: 29<sup>th</sup> Street and North Park Way**  
**Emergency Meeting Area: North Park Theatre Parking Lot**



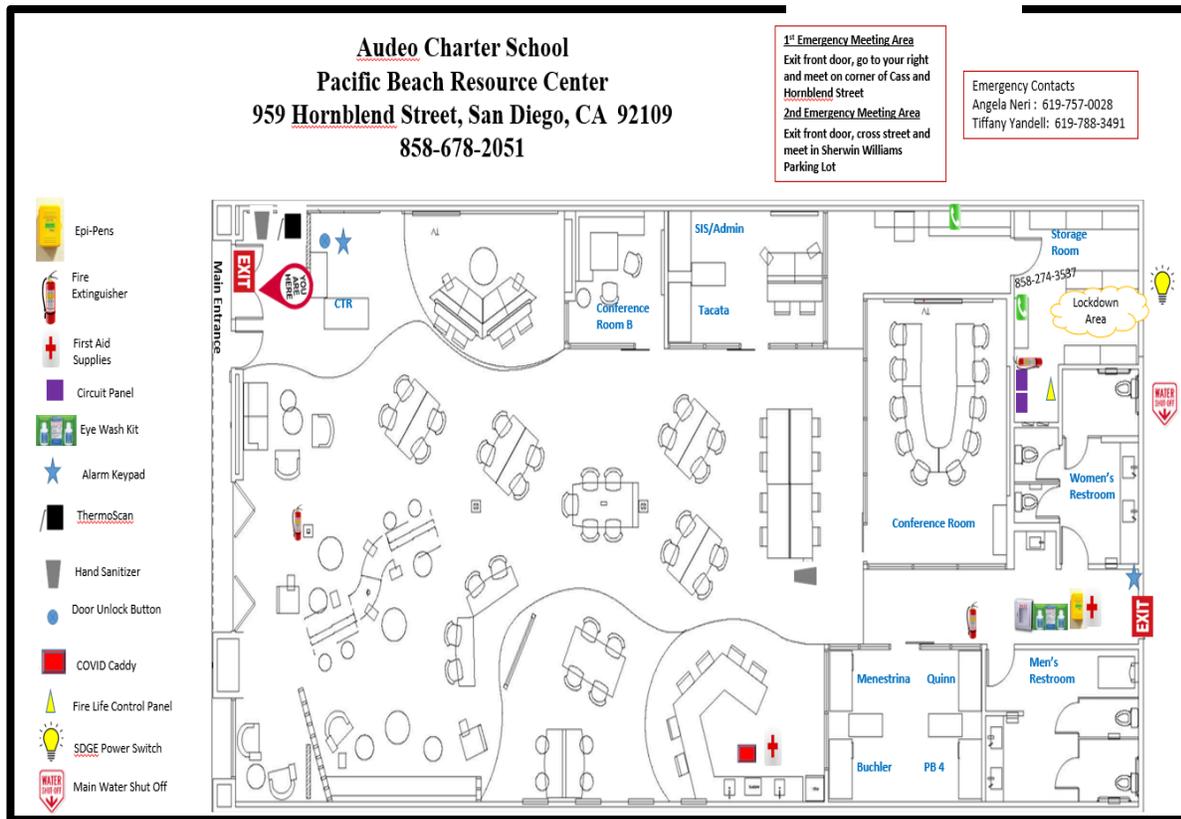
### North Park Resource Center Plan



**Pacific Beach Resource Center: 959 Hornblend St., San Diego, CA 92109**  
**Cross Street: Cass St.**  
**Emergency Meeting Area: Cass or. Hornblend then to Sherwin Williams Parking Lot**

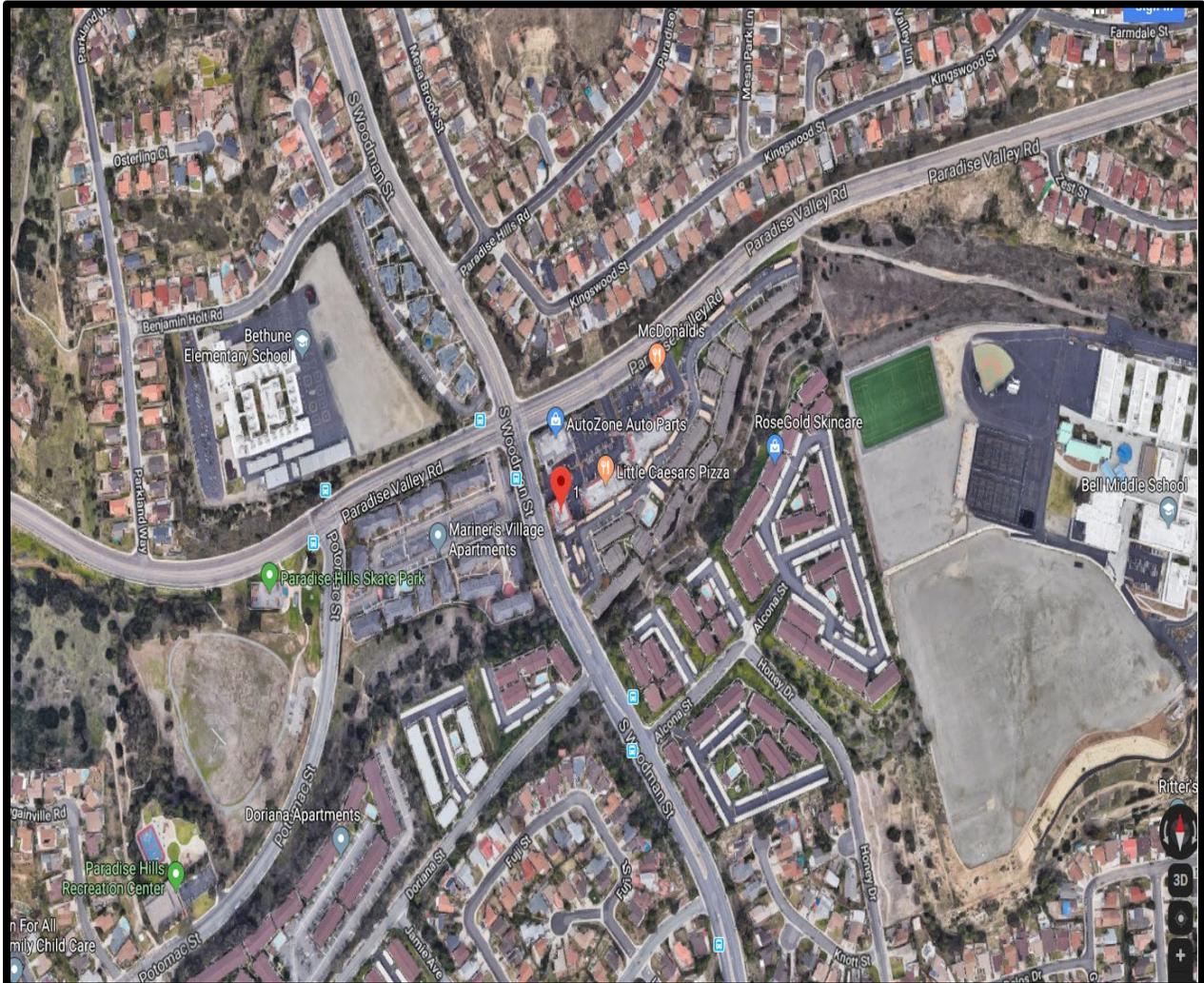


# Pacific Beach Resource Center Plan



**Paradise Hills Cadet Corp:**  
**Cross Street:**  
**Emergency Meeting Area:**  
**Center**

**6907 Paradise Valley Rd., Unit #1, SD 92139**  
**S. Woodman St.**  
**First, Parking lot next to Autozone, then to Dialysis**



# Paradise Hills Cadet Corp Plan

**The Charter School Of San Diego  
 Cadet Corp Resource Center  
 6907 Paradise Valley Road, Unit 1  
 San Diego, CA 92139  
 858-678-2020**

**1<sup>st</sup> Emergency Meeting Area**

Exit main door, walk across parking lot and meet in parking lot area next to Auto Zone.

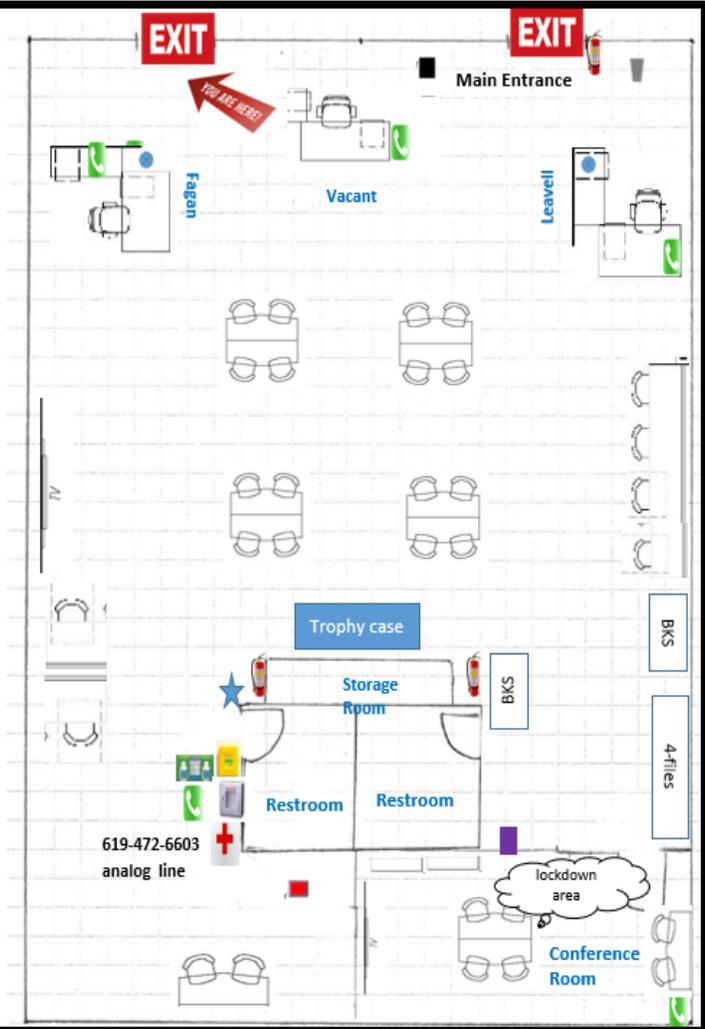
**2<sup>nd</sup> Emergency Meeting Area**

Exit Main Door, head east and go to Dialysis center.

**Emergency Contacts**

Angela : 619-757-0028  
 Tiffany: 619-788-3491

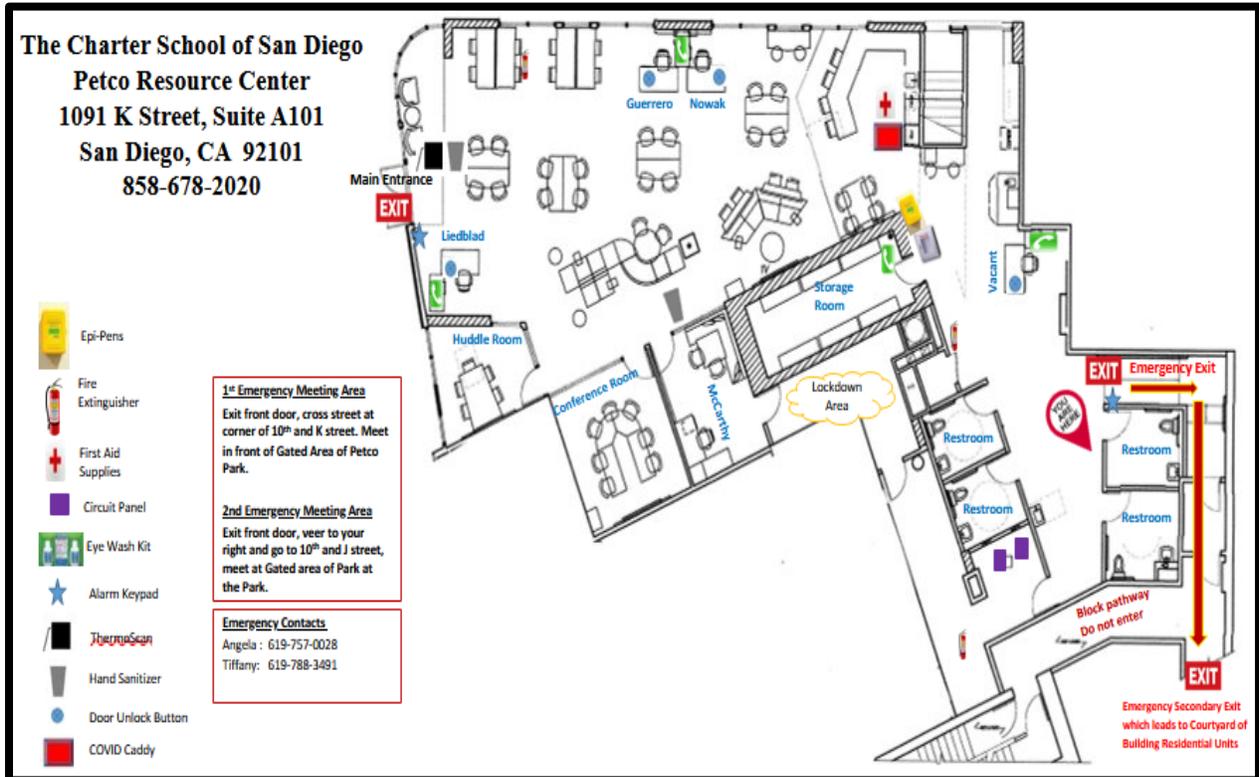
-  Epi-Pens
-  Fire Extinguisher
-  First Aid Supplies
-  Circuit Panel
-  Eye Wash Kit
-  Alarm Keypad
-  AED
-  Lockdown area
-  ThermoScan
-  Hand sanitizer
-  Hardwire button for constant door lock
-  COVID Caddy



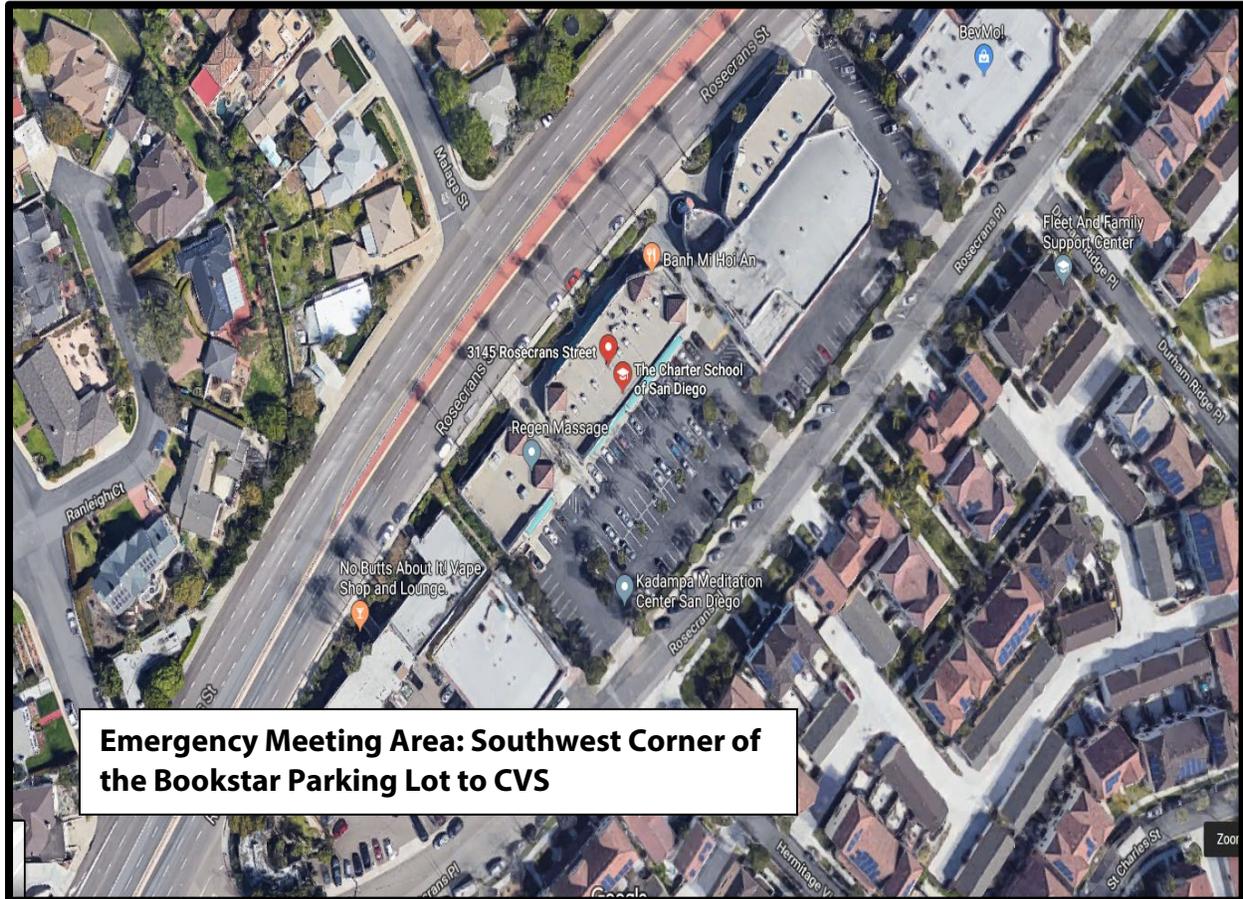
**Petco Park Resource Center:** 1091 K St., Suite A101, San Diego, CA 92102  
**Cross Street:** 10<sup>th</sup> Street  
**Emergency Meeting Area:** 10<sup>th</sup> or. K St. to gated area of Petco; 10<sup>th</sup> or. J St to gated area of Park at the Park



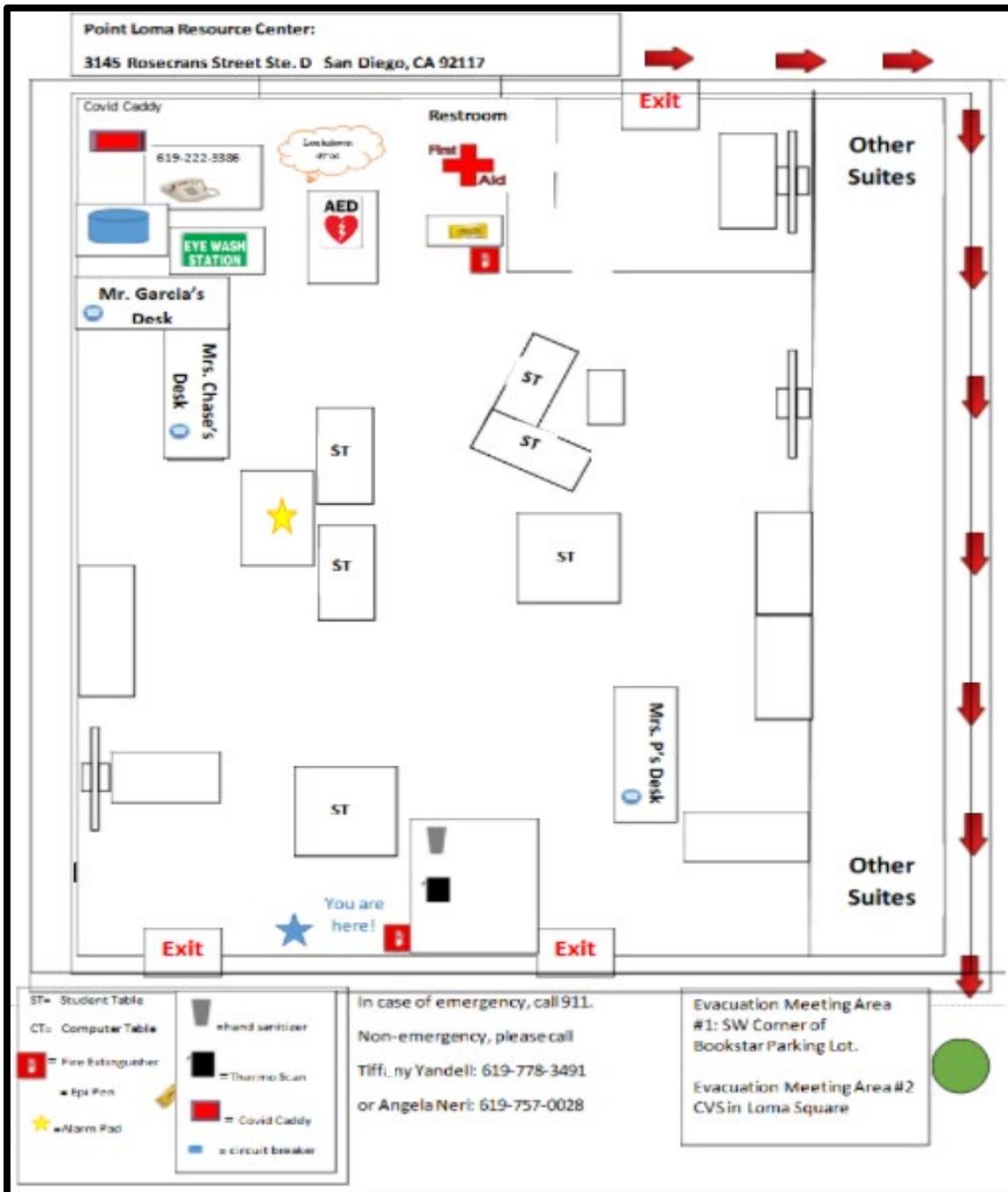
# Petco Park Resource Center Plan



**Point Loma Resource Center:** 3145 Rosecrans Street, Suite D, San Diego, CA 92110  
**Cross Street:** Rosecrans Street and Evergreen Street  
**Emergency Meeting Area:** Southwest Corner of the Bookstar Parking lot to CVS



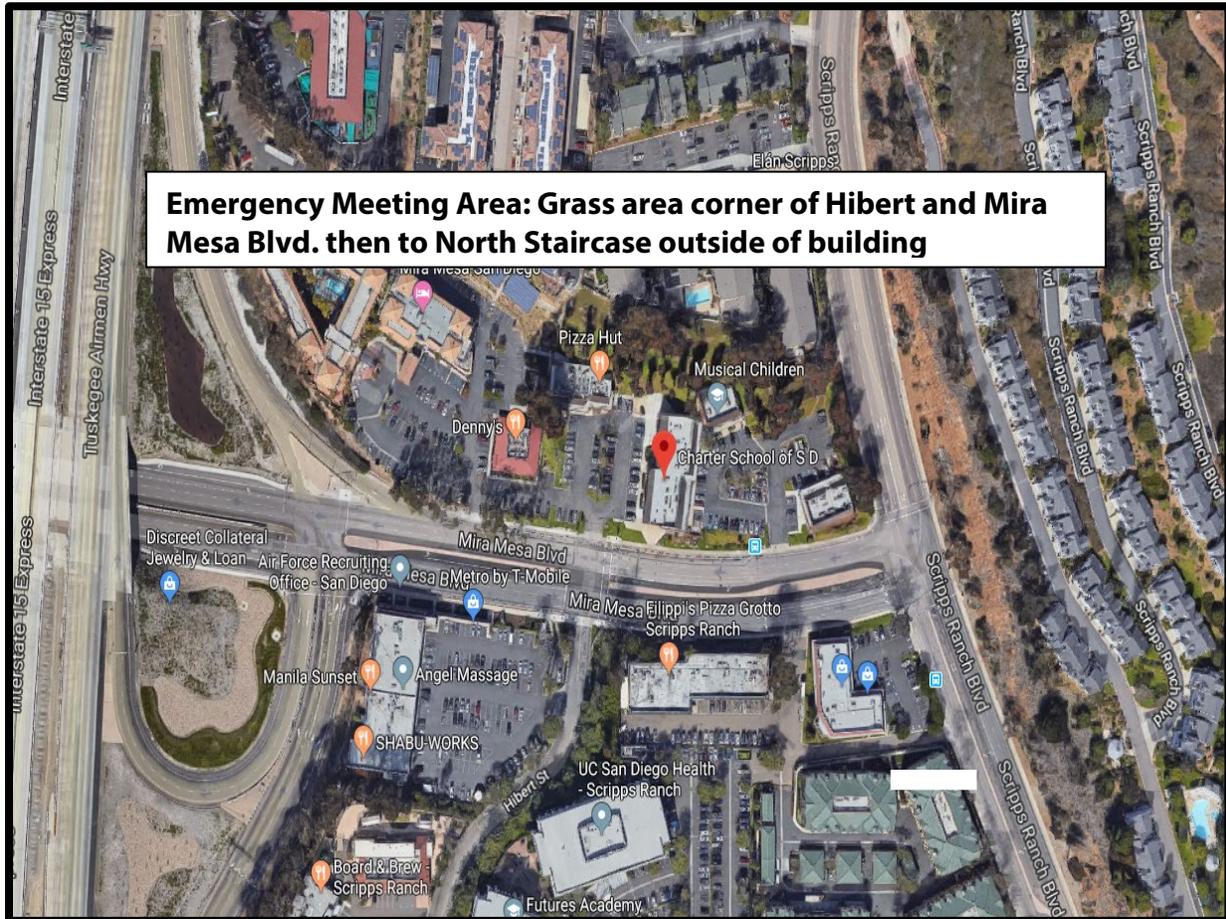
# Point Loma Resource Center Plan



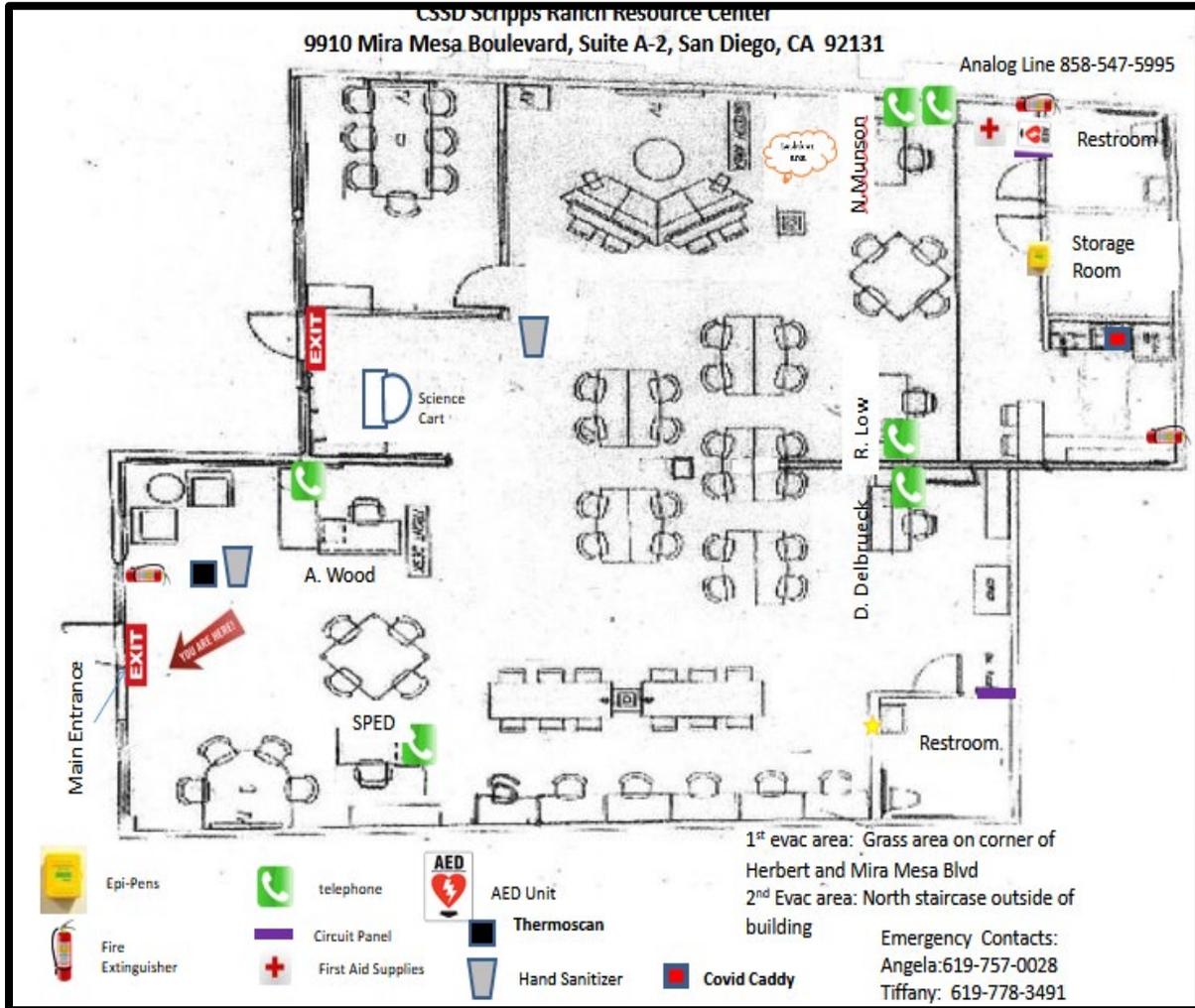
**Scripps Ranch: 9910 Mira Mesa Blvd., Suite A-2, Bldg. B, San Diego, CA 92131**

**Cross Street: Scripps Ranch Blvd.**

**Emergency Meeting Area: Grass Area Corner of Hibert and Mira Mesa Blvd. then to North Staircase Outside of Building**



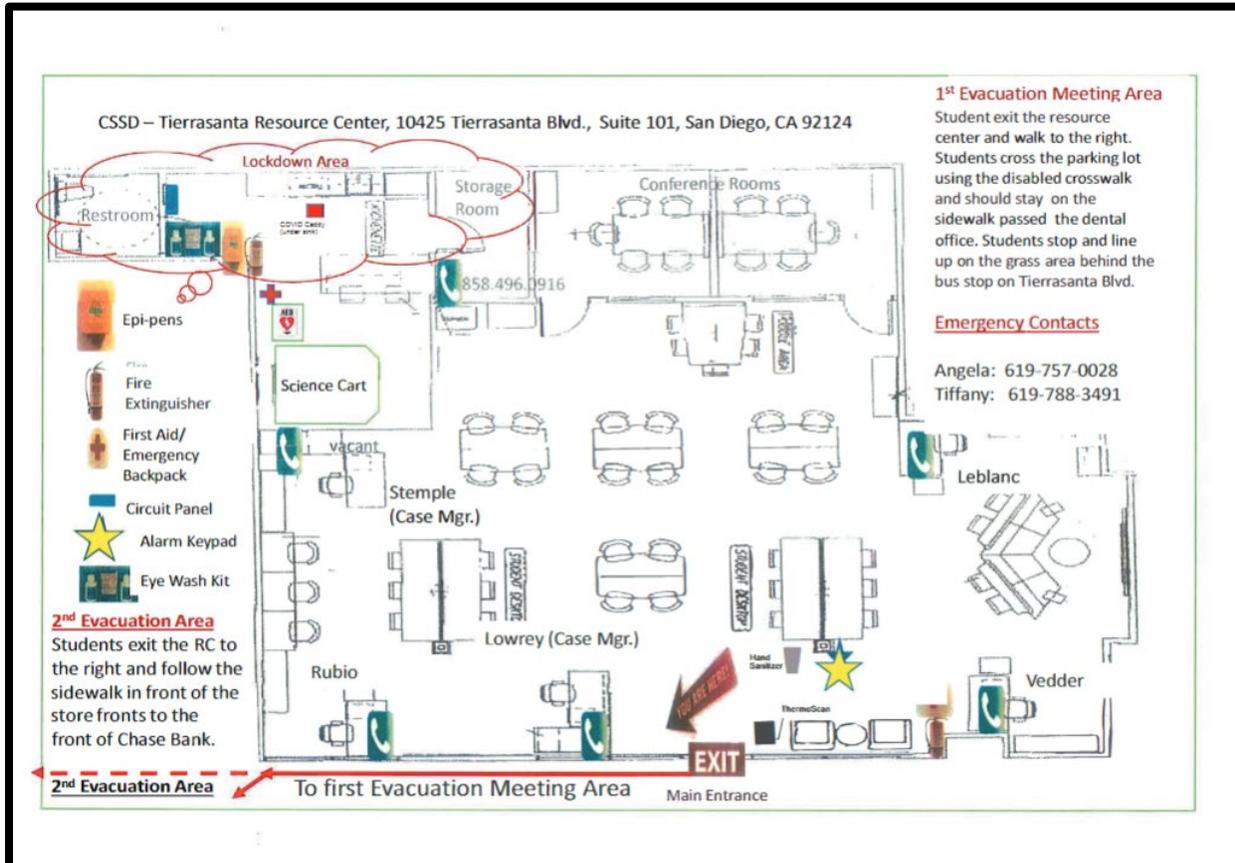
# Scripps Ranch Resource Center Plan



**Tierrasanta Resource Center:** 10425 Tierrasanta Blvd, Suite 101, San Diego, CA 92124  
**Cross Street:** Santo Road  
**Emergency Meeting Area:** Grass Area Behind Bus Stop on Tierrasanta Blvd. to Front of Chase Bank



# Tierrasanta Resource Center Plan



**Tierrasanta K-5 Resource Center: 10725 Tierrasanta Blvd., San Diego, CA 92124**

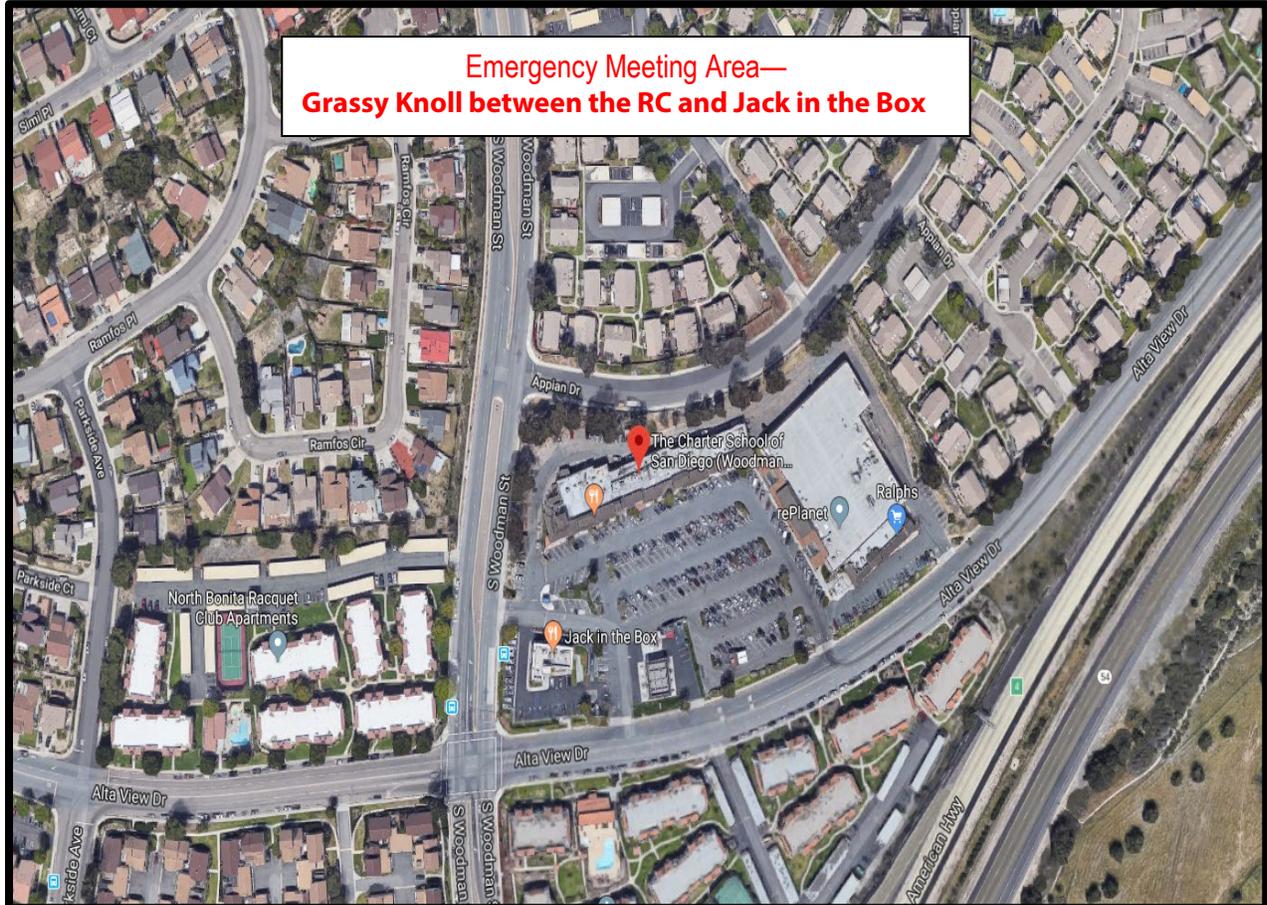
**Cross Street: Santo Road and La Cuenta Dr.**

**Emergency Meeting Area: Southwest Area of Parking Lot Behind Garden to Parking Lot Next to Spa**





**Woodman Resource Center:** 2939 Alta View Dr., Stes. B & C, San Diego, CA 92139  
**Cross Street:** S. Woodman Street  
**Emergency Meeting Area:** Grassy knoll in between the RC and Jack in the Box





## Persons with Disabilities

In emergencies, persons with disabilities may need special assistance in evacuating to the designated location. Each Incident Commander is responsible for pre-identification of persons with disabilities who may need assistance and assigning staff to assist them. Persons with disabilities or other staff who may need special assistance in an evacuation situation are responsible for ensuring that their Department Head is aware of their needs for assistance.

Because of the volume of foot traffic that can be expected through stairways and corridors in a building during an evacuation, there must be an area of rescue assistance established aside from the main flow of foot traffic. Such an area must be clearly marked so disabled individuals know where to go for refuge in a critical time. Proper signage for this area is "Area of Rescue Assistance." Evacuation maps will articulate this information.

The responsibility to determine disability needs, assign appropriate staff and ensure proper resources for evacuation and reunification belongs to the following individuals at this RC:

Primary: Incident Commander

Alternate: Operations Chief

## Return to Facility

The Incident Commander, in consultation with the Public Safety Incident Commander if necessary, will determine when individuals can return to the facility. In the event that staff or students must be released early, the Incident Commander must request approval from the Office of the President. The Safety Coordinator should be advised of this information.

The notification for a safe return to facilities located at this RC is:

Communication via Emergency Radio and/or Cell Phone

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## **Shelter-In-Place Procedure**

**Shelter-In-Place generally occurs when evacuating the RC is more dangerous than taking shelter inside a building. This generally occurs during natural disasters, severe weather conditions, or health hazards. The following procedure applies to this RC. Additional information pertaining to Shelter-in-Place is available in Emergency Procedures.**

### **Notification**

**The Incident Commander is responsible to notify the Incident Command Team when a Shelter-In-Place is necessary. The Safety Coordinator, in coordination with the Incident Commander is responsible for activating the Shelter-In-Place notification procedures for RC-level personnel.**

**The signal for Shelter-In-Place is: 3 short beeps, 3 long beeps followed by Verbal Instructions**

**If the primary emergency notification system fails to activate, the secondary notification method will be handheld air horns found in the Emergency Disaster Kit.**

### **Activation & Deactivation**

**Quickly direct students and staff inside to the nearest room; do a verbal and visual sweep as you get everyone inside. Shut all doors and windows leading into the room, including interior doors. Doors may be opened for late arrivals if the exterior environment is safe. Take student attendance and report missing or extra students to the office by radio, telephone or e-mail. For environmental emergencies, immediately shut off the air conditioning/heating system, try to seal air vents and gaps under doors and around windows. Monitor your local radio, T.V. or e-mail for updates. Remain in Shelter-in-Place until the "All Clear" signal is sounded.**

### **Return to Facility**

**The Incident Commander, in consultation with the Public Safety Incident Commander if necessary, will determine when individuals can return to the facility. In the event that staff or students must be released early, the Incident Commander must request approval from the Office of the President. The Safety Coordinator should be advised of this information.**

**The notification for a safe return to facilities located at this RC is:  
Communication via Emergency Radio and/or Cell phone**

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## Emergency Lockdown Procedures

*If an emergency situation near an RC endangers student or staff safety,  
Lockdown the Resource Center/Building.*

**FIRST: Follow the below lockdown procedures and notify an Executive Safety Committee Member immediately.**

<b>Executive Safety Committee</b>	<b>Office Number</b>	<b>Cell Number</b>
Angela Neri	858-678-2045	619-757-0028
Eleanor Pe	858-678-2036	
Tim Tuter	858-678-2042	619-992-5740

During a lockdown, several security measures will take place:

1. A teacher or designee will declare “this is a lockdown” alerting staff and students in a calm manner.
2. All students and staff remain in their RC or offices.
3. All RC doors and windows are to be closed and locked.
4. All window blinds should be drawn or closed.
5. A staff member will activate “STAY” function on ADT/Protection One Security Alarm Panel.
6. Safety Lead or designee in RC will call/email Executive Safety Committee.
7. A staff member will take a head count of ALL persons in RC/building
8. A staff member will use the attached Sign In sheet for ALL persons on location.
9. All lights should be turned off (as needed)
10. A member of the Executive Safety Committee will communicate and work directly with the Resource Center Safety Ambassador and/or designee.
  - a. ONE TO ONE COMMUNICATION--NOT EVERYONE NEEDS TO CALL.
11. No one is permitted to leave and no one, including a parent, is allowed in the RC.
12. Students and staff will remain quiet and calm.
13. All individuals should seek immediate cover under desks or tables and remain low to the ground and away from windows or doors as needed.
14. First aid will be rendered by staff as necessary.
15. Resource Center staff should not make statements to the media.

***Only a member of the Executive Safety Committee may lift a lock down.***

Persons who may activate an RC lockdown:

- Any member of the RC staff or community safety support (Police, Fire, Mall Management etc.) may declare a lockdown.

Conditions in which to activate a school-wide or RC- specific lockdown may include, but not limited to:

- Authorities inform the school or RC of a dangerous situation in close proximity to the facility.
- The immediate pursuit of a dangerous suspect.
- The execution of a high-risk search or arrest warrant.
- A large-scale enforcement operation involving potentially dangerous suspects.
- Someone with a weapon is en route to an RC.
- Gunshots are heard nearby.
- An act of terrorism.

***BEST PRACTICE: Enroll your work email on local media news alerts for your area.***

Should a lockdown occur, parents should be aware of the following:

- Remain calm as RC and local authorities manage the situation.
- If a lockdown lasts for an extended period of time, or goes beyond dismissal time, students will not be allowed to leave until recommended by the appropriate authorities. RC staff will attempt to notify parents by phone.
- Parents may be required to pick up children from the RC or another designated staging area, once it is determined to be safe to do so.
- Parents will be required to present identification.
- The reunification location will be given to parents over the phone, if possible.
- Students and parents are reminded that during an emergency situation, cellular sites may be overwhelmed due to a high volume of calls. It is critical that text messaging and cell phone use be kept to a minimum so that emergency services have priority to assist the students and staff on the RC.

Following Lockdown:

- The Safety Ambassador for the RC will fill out and submit to Angela Neri within 24 hours:
  - Lockdown Incident Report Form
  - Emergency Sign-In Report
  - Emergency Student Sign Out Report
- The Safety Committee will convene within 72 hours to debrief
- The Safety Ambassador Coordinator will keep a record of all occurrences.

# LOCKDOWN INCIDENT REPORT

<b>Resource Center/Building:</b>	<b>Duration of Lockdown:</b> <b>Beginning time:</b> _____ <b>End Time:</b> _____
<b>Date of Incident:</b>	<b>Report Prepared by:</b> _____
<b>Name of Executive Safety Lead Notified:</b> _____	

1. **Type of Incident/Brief Explanation:**
  
2. **Who declared the lockdown?**
  
3. **How did you hear about the need for a lockdown?**
  
4. **Where there any First Aid or Health matters during the lockdown? If so, please explain.**
  
5. **Is there a need for follow up to any students/parents?**
  
6. **Did you have enough communication, information and resources during your lockdown?**
  
7. **Are there any recommendations:**

**Attach this report to the Sign in Sheets and the Sign Out report.  
Return entire Lockdown packet to Angela Neri within 24 hours.**

**A.**

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

***Date Report Received:*** \_\_\_\_\_

**EMERGENCY LOCKDOWN SIGN IN SHEET (ALL persons in RC/building sign in)**  
*When the Safety Team lifts the lockdown, please use the attached Emergency Release Record to sign students out.*

Date/Time of lockdown:	RC/Building:	Name of Safety Lead Notified:
------------------------	--------------	-------------------------------

Use the below sign in sheet for ALL persons in the lock down area.

**NO ONE is to leave OR enter the RC/building.**

	Last Name	First Name	Position/Role	Signature
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				
21				
22				
23				
24				

**EMERGENCY RELEASE SIGN OUT RECORD****PAGE 1 of \_\_**

<b>Date:</b>	<b>Time of lockdown:</b>	<b>Safety Lead lifted lockdown:</b>
<b>RC/Building:</b>	<b>Time lockdown lifted:</b>	<b>Location of students at Lift:</b>

***PLEASE PRINT***

<b>1.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

<b>2.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

<b>3.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

<b>4.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

**EMERGENCY RELEASE SIGN OUT RECORD****PAGE 2 of \_\_**

<b>5.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

<b>6.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

<b>7.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

<b>8.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

<b>9.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

**EMERGENCY RELEASE SIGN OUT RECORD****PAGE 3 of \_\_**

<b>10.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

<b>11.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

<b>12.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

<b>13.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

<b>14.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

**EMERGENCY RELEASE SIGN OUT RECORD****PAGE 4 of \_\_**

<b>15.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

<b>16.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

<b>17.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

<b>18.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

<b>19.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

**EMERGENCY RELEASE SIGN OUT RECORD****PAGE 5 of \_\_**

<b>20.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

<b>21.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

<b>22.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

<b>23.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

<b>24.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

**EMERGENCY RELEASE SIGN OUT RECORD****PAGE 6 of \_\_**

<b>25.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

<b>26.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

<b>27.</b>	<b>Student Last Name:</b>	<b>Student First Name:</b>	<b>Student Signature:</b>
	<b>Released To:</b>	<b>Relationship to Student:</b>	<b>Date/Time Released:</b>
	<b>Signature of Parent/Guardian:</b>	<b>Form of ID:</b>	<b>Checked By:</b>

## Parent Notification & Reunification Procedure

Following a lockdown, shelter-in-place, or other emergency action, there may be a need to reunite students with parents. This is often a difficult and somewhat chaotic event, requiring planning and resources. The following RC procedure was developed to limit chaos and ensure a safe reunification of students with their parents or legal guardians.

### Notification

In the event the Administrator of Instructional Services determines students are to be released from the RC, or that notification of parents/guardians is warranted, he/she will first notify the Director of Operations and Technology. A collaborative effort will begin to notify parents/guardians of the reunification effort using information provided on student's emergency contact cards, as well as information available within the school student database.

### Reunification

Reunification will generally occur from the location pre-identified as the evacuation point. Staff and law enforcement will be stationed at one central point, where all students will enter and exit the reunification location. Incident Command Team members will use RC attendance and emergency card information to check in and out students.

The responsibility of reunification, determining needs, assigning appropriate staff, and ensuring proper resources for reunification at this RC belongs to the following individuals:

Primary: Incident Commander

Alternate: Operations Chief

## **Earthquake Procedure**

**Earthquakes often occur without notice and generally have after-shocks which are just as dangerous as the initial quake. Building evacuation will generally occur following a major earthquake due to potential dangers of fires or explosions. The following earthquake information pertains to this RC.**

### **Notification**

**Give the command to “Drop, Cover, and Hold” at the first indication of shaking ground.**

**Attempt to gain safety under tables, desks, or other supporting objects. Consider holding onto the supporting object to keep it over your body. If in a hallway, move to an inside wall and stand in the doorway.**

**Remain away from windows to avoid falling glass, and away from large objects that may fall upon your person.**

**Extinguish any flames and turn off power to equipment and electrical appliances if possible. Turn off gas valves as well.**

**Hold undercover for at least two minutes to assess damage and injuries while waiting for the first aftershock to occur.**

**After the first aftershock, activate your RC evacuation procedures after confirming the path and destination are safe.**

**Monitor your RC emergency radio for possible updates and instructions from the School’s Emergency Operations Center. Use radio Channel 1.**

**Do not return to the inside of any building until emergency personnel check the buildings for safety.**

### **Structural Failure**

**Give the command to evacuate the affected building or area and secure the premises to prevent entrance by others.**

**Advise your Administrator of Instructional Services of the situation. Contact the Director of Operations & Technology at (619) 778-3491 or by using your emergency radio.**

**Upon arrival of emergency personnel, coordinate to evaluate known information and decide upon a course of action to render the situation safe.**

## **Fire Procedure**

**Fires often occur without notice and can spread quickly if not addressed. Building evacuation will generally occur following a fire notification due to potential dangers of burns and smoke inhalation. The following fire information pertains to this RC.**

### **Notification**

**Notify your Administrator of Instructional Services. If possible, quickly assess the RC and size of the fire to determine an appropriate evacuation action.**

**Alert all staff and students of the fire location and condition – activate your fire alarm system to sound the alarm.**

**Begin evacuation procedures for everyone to an appropriate assembly area. Remember to move individuals away and upwind from the hazard.**

**Call the Fire Department (“9-1-1”) or notify the Director of Operations & Technology by calling 619-778-3491. If phone service is unavailable, use your emergency radio (Channel 1). The Director of Operations & Technology will handle notifying the proper emergency and communications personnel.**

**Render first aid as needed. Be sure to notify the Director of Operations & Technology of injuries.**

**Activate specific components of your RC emergency plan as appropriate.**

**Supervise the evacuation and ensure all rooms and unsafe areas are evacuated. Check to ensure accountability for all staff and students. Maintain control of evacuees at the RC assembly area until the situation is under control.**

**Have some staff standing by at the RC entrance to direct responding fire personnel to the fire location.**

**Upon arrival of emergency personnel, coordinate to evaluate information and decide upon a course of action to either return to the RC or arrange for an early dismissal.**

## Best Practice Considerations for Schools in Active Shooter and Other Armed Assailant Drills

The National Association of School Psychologists and the National Association of School Resource Officers have partnered to provide this guidance on armed assailant training, with input from Safe and Sound: A Sandy Hook Initiative and the ALiCE Training Institute. This document provides guidance on the important factors schools must take into account when considering and conducting armed assailant drills.

### OVERVIEW

- A. Response to armed assailants has focused on implementing an RC lockdown. Recently, discussion has emphasized options-based approaches, which sometimes include the “Run, Hide, Fight” model.
- B. Armed assailant drills have both benefits and concerns associated with their implementation.
  - Armed assailants in RC’s account for only 1% of homicides among school-age youth; schools must balance costs and benefits when allocating crisis preparedness resources.
  - Such drills have the potential to empower staff and save lives, but without proper caution, they can risk causing harm to participants.
  - Available research supports the effectiveness of lockdown drills carried out according to best practices, but research is still needed on the effectiveness of armed assailant drills.

### DRILL APPROACHES AND PLANNING

- A) Traditional lockdowns should remain the foundation of an options-based approach to active assailant training, which allows participants to make independent decisions in evolving situations.
  - B) Exercises should be considered in a hierarchy with simple discussion-based exercises before complex operations-based drills are practiced.
  - C) Schools should keep simulation techniques appropriate to the participants’ developmental maturity.
    - Inform participants of the use and purpose of props and simulation aids prior to the drill.
    - Using Airsoft guns as simulation aids requires careful safety measures and opt-out opportunities.
- B. Regular practice helps participants develop readiness and quickly access and apply knowledge.

### DEVELOPMENTAL AND MENTAL HEALTH CONSIDERATIONS

- A. Children model their reactions on adult behavior, so effective drills should result in staff who inspire calm and confidence in

- students.**
- B. **It is critical that participation in drills be appropriate to individual development levels, and take into consideration prior traumatic experiences, special needs, and personalities.**
  - C. **School-employed mental health professionals should be involved in every stage of preparation.**
- **Prior to the drill, staff should be trained to recognize common trauma reactions.**
  - **Adults should monitor participants during the drill and remove anyone exhibiting signs of trauma.**
  - **After completion, staff and students should have access to mental health support, if needed.**
    - D. **Participation should never be mandatory, and parental consent should be required for all students.**
    - E. **If staff chooses to opt-out of intense drills, they should receive comparable, less intense instruction.**

#### **STEPS FOR CONDUCTING SAFE, EFFECTIVE, AND APPROPRIATE DRILLS**

1. **Create a school safety team (including an administrator, a school mental health professional, a school nurse; security personnel, teachers, and parents) that also coordinates with local law enforcement and emergency responders.**
2. **Conduct a needs assessment of the school community.**
3. **Implement a cost–benefit analysis that considers all emergency preparedness needs and options.**
4. **Tailor drills to the context of the school environment.**
5. **Create a plan of progression that builds from simplest, lowest-cost training; identifies obstacles and goals; and establishes a timeline.**
6. **Prepare for drill logistics that ensure physical and psychological safety as well as skills and knowledge acquisition.**
7. **Develop a communications plan that gives all participants advance warning and the ability to opt out and/or provide feedback.**
8. **Establish a long-term follow-up plan to support sustainability that includes assessing ongoing and/or changing preparedness training needs.**

## Active Shooter and Other Armed Assailant Drills

### Introduction

The National Association of School Psychologists (NASP) and the National Association of School Resource Officers (NASRO) represent key members of school safety and crisis teams. We are committed to supporting school communities' understanding and implementation of best practices related to school safety, school mental health, and crisis prevention and response. We have partnered to provide this guidance on armed assailant training, with input from Safe and Sound: A Sandy Hook Initiative, a nonprofit organization of parents, educators, and other members of the school community, and the ALiCE Training Institute, a for-profit company that provides active shooter training.

Critical elements to effective crisis preparedness and response of any kind are a common understanding of purpose and procedures among all participants, a respect for each other's roles and perspectives, and a shared commitment to ensure the safety and well-being of all members of the school community. Our common goals in this document are to provide best practice information to help schools determine to what extent they need armed assailant training and to conduct trainings that make best use of resources, maximize effectiveness, and minimize physical and psychological risks. Importantly, this document is not intended to provide specific guidance on *how* to conduct active assailant drills but rather to provide guidance on many of the issues that must be considered when planning for and implementing such training. The specifics of any training should be determined at the local level by appropriately trained school leadership, school safety and mental health personnel, and law enforcement.

Please note that the appendices in this document contain very important decision-making information. They are referenced within and at the end of the document.

### PART I: OVERVIEW

Schools have a responsibility to protect the physical and psychological well-being of their students and staff. This includes creating positive school climates, preventing negative behaviors such as bullying and harassment, and being prepared to respond to potential threats such as weather emergencies, fires, and acts of violence. Effective crisis planning, prevention, response, and recovery capabilities are essential for schools to meet this responsibility (Cowan, Vaillancourt, Rossen, & Pollitt, 2013). Although situations involving an active, armed assailant on school property are extremely rare, schools are increasingly considering how to best prepare for and respond to this type of event.

According to the U.S. Department of Homeland Security (2008) and the Federal Bureau of Investigation (Blair & Schweit, 2014) an *armed assailant* is defined as an armed person who attempts to use deadly force on others, typically in a confined and

populated area. The term *active shooter* refers to those assailants who use firearms, as opposed to knives or other weapons. Some U.S. states have mandated active shooter drills for schools but have offered little to no guidance on proper implementation.

Schools should plan for the rare possibility of an armed assailant as part of a comprehensive crisis/emergency preparedness effort; however, the nature and extent of those preparedness activities should be based upon a risk assessment of the crisis events a given school is most likely to confront.

How this training is conducted must carefully account for students' developmental levels, school culture and climate, and features specific to each school community (such as geography, weather, crime, and environment). While one of the primary goals of crisis preparedness is to develop a sense of empowerment and control, armed assailant drills not conducted appropriately may cause physical and psychological harm to students, staff, and the overall learning environment. It is critical that administrators, school-employed mental health professionals, school resource and police officers, and crisis team members work closely together to carefully develop a staff and student training protocol that follows the best practice considerations outlined below.

#### A. Background

The 1999 shootings at Columbine High School ushered in heightened attention to the need for schools—and law enforcement—to be better prepared to respond to armed assailant situations. Subsequently, schools focused primarily on lockdown practices, while law enforcement focused on improving tactics to find and stop the assailant as quickly as possible. In 2013, the U.S. Department of Education recommended expanding the lockdown-only approach for schools (i.e., confining students and staff to their rooms) to an options-based approach that allows school staff to make more independent decisions about how to protect their students depending on evolving circumstances (e.g., evacuate the building rather than stay locked in a RC). These approaches include adapting the “Run, Hide, Fight” model that was originally developed for adults in response to workplace violence. This expansion has spurred a range of approaches to armed assailant training and an increase in the number of schools conducting drills with varying degrees of intensity and involvement of school staff and students. In some instances, drills are conducted with insufficient consideration of the potential psychological impact or appropriateness of a particular drill based on the developmental level or psychological risk factors of participants.

#### B. Benefits and Concerns Associated with Armed Assailant Drills

*Costs versus benefits.* School-associated homicides are extremely rare, accounting for less than 1% of all homicides among school-age youth (Robers, Kemp, Rathbun, & Morgan, 2014). While an attack by an armed assailant on RC grounds is possible—and devastating if it happens—it is not as probable as other types of crisis events. Schools must consider the cost of some types of drills (e.g., full scale simulations), and whether investment in them will reduce resources available for other critical safety preparation

activities such as first aid training, environmental design measures, and staff development focused on more comprehensive school safety preparedness.

***Empowerment versus potential harm.*** The primary purposes of an armed assailant drill are to provide law enforcement and relevant school leadership and staff the opportunity to practice skills and protocols and to identify and correct areas of weakness in knowledge, communication, coordination, and decision-making. The goal is to empower participants and save lives and prepare professionals and staff for this role and responsibility. As the focus of such drills expands to include all staff and students, the potential for causing harm to participants expands as well. The level of drill intensity (e.g., use of loud gun fire and airsoft guns), extent of warning that a drill will occur, and whether participation is required or voluntary may affect reactions to the experience. Additionally, an individual's cognitive and developmental levels, personality, history of adverse or traumatic experiences, and psychological makeup are among the many factors that influence the potential for harm.

It is essential to include parents in discussions of their child's developmental level, education, and readiness for armed assailant drills. Highly sensorial armed assailant drills for students in preschool and elementary learning environments are not recommended. Any such drills should be conducted using age appropriate simulation stimuli (e.g., the sound of gunshots near a preschool room would not be appropriate).

***Available research.*** Practicing disaster response procedures has been found to increase the probability of adaptive behavior during a crisis (Jones & Randall, 1994; Miltenberger et al., 2005). Specifically, lockdown drills implemented according to best practices have been suggested to increase knowledge and skills of how to respond appropriately without elevating anxiety or perceived safety risk (Zhe & Nickerson, 2007). However, at present there is no empirical research regarding school-based armed assailant drills.

***Potential lawsuits.*** The manner in which some armed assailant drills (e.g., unannounced) have been conducted in the workplace has led to lawsuits imposed on employers due to psychological and physical harm sustained by some participants (Frosch, 2014). Schools need to determine to what extent advanced armed assailant drills are necessary and carefully construct these drills to avoid physical and/or psychological harm. Regardless of the projected benefits and perceived concerns, the fact remains that armed assailant drills are uncharted territory for schools. Schools that decide to conduct a drill should use a multidisciplinary safety team (including parents) that educates and trains all participants in relevant curricula and protocols. With careful planning, data collection, and continual review of these programs, schools can begin to develop an approach that minimizes negative effects and improves preparedness.

## PART II: DRILL APPROACHES AND PLANNING

### **A. Traditional Lockdown Versus Options-Based Drills**

Lockdowns have been the standard approach for the school response to threatening situations for nearly two decades. Lockdowns involve locking the door, moving students out of sight, and requiring students to remain quiet within the room. Lockdowns should continue to be included in any options-based approach to active assailant training.

Options-based drills provide students and staff with a range of alternative strategies to save lives, and the permission to use them, depending on the situation. For instance, the nature of the threat, time of day, and the location of students interact to affect the best options. The premise of options-based drills is to allow participants to make independent decisions including when and whether to evacuate, barricade RC doors, or as a last resort, counter the attack of the armed assailant. As with other safety drills (e.g., fire or tornado), it is important that options-based drills take into account the developmental levels of students as well as the physical layout of the RC (e.g., ease of access to outside doors and proximity of places to hide other than a resource center).

### **B. Hierarchy of Education and Training Activities**

Crisis preparedness exercises and drills should be conducted in a progression of steps that begin with basic activities and progress to more advanced drills and exercises as needed (with advanced simulations being a more advanced type of crisis preparedness activity). Schools should start with simple, low-cost, discussion-based exercises (e.g., introductions to crisis responders, orientation activities, use of instructional media, or tabletop drills) and, if the school safety team determines it appropriate, work their way toward more complex and expensive, operations-based exercises (e.g., walk-throughs, specific emergency drills, and crisis simulations; NASP, 2013; U.S. Department of

Education, 2006a). *Appendix 1 summarizes this hierarchy of activities and provides an example of how armed assailant preparation could occur at each level.*

### **C. Simulations and Simulation Techniques**

Many schools are also using or considering simulation exercises. Simulations require that participants are provided with real time information and stimuli (e.g., simulated gunshots, PA announcements, and electronic communications) to determine the movements of an armed assailant in order to make the best decisions. It is important that simulation drills are preceded by extensive prior education and preparation, and consideration for individual readiness. For some participants, this intense exposure and practice may empower them with experience, options, and a sense of control. For others, this type of drill may be emotionally traumatic (Frosch, 2014).

If a school deems it necessary to simulate an armed assailant, safety teams should carefully consider the number of different strategies for simulation during a drill,

taking into account developmental age and readiness of staff before determining what techniques are most appropriate.

***Drills utilizing props and simulation aids.*** Props and other aids may be used to simulate a weapon, gunfire, or other desired circumstances that are associated with an armed assailant event. In advance of any drill, participants must be aware of the prop's purpose and potential presence, particularly when the purpose of the prop is not obvious. For example, the use of an air horn, or other prop to simulate gunfire, may traumatize participants if they have not been instructed on the prop's purpose in advance of the drill.

***Airsoft as a simulation aid.*** Airsoft guns (simulated weapons that shoot plastic BBs) may be used as a simulation aid during armed assailant drills. Caution must be exercised to ensure the safety of all participants prior to any drill involving airsoft guns. The authors of these guidelines have received anecdotal reports from school professionals of armed assailant drill participants being physically harmed from the use of simulation aids. In addition, for those with trauma histories, involvement in a highly sensorial armed assailant drill could trigger strong psychological reactions. Thus, to mitigate potential physical or psychological harm, opt-out opportunities should be offered to all participants after being fully informed about the drill.

#### **D. Considerations**

Schools must carefully consider the decision-making protocol for people to engage in a strategy other than lockdown. For instance, run/escape may lead to safety for some, but it might inadvertently lead to danger for others as students unknowingly "escape" into the path of an unknown assailant, expose them to the sight of injured or dead classmates and teachers, or result in students trampling each other to get to the exit door. These concerns need to be addressed when planning and practicing active assailant drills. Students should be taught to first and foremost follow the direction of their teacher, and how to make decisions if that teacher is incapacitated. Helping students and staff understand the decision-making criteria is crucial. It is also important to consider the special needs of students with disabilities, both in terms of a drill and the expectations for their functioning in the event of real emergency (U.S. Department of Education, 2006b).

#### **E. Regular Practice**

As part of the initial planning process for crisis preparedness, schools should identify how to integrate and reinforce the concepts taught during the drills. Introductions, orientations, walk-throughs, and tabletop exercises should continue to be integrated into yearly crisis preparation activities so learned skills are refreshed and rehearsed. Frequent and varied practice, training, and discussion activities aid the development of readiness, providing staff and students the means to quickly access and apply their knowledge.

### **PART III: DEVELOPMENTAL AND MENTAL HEALTH CONSIDERATIONS**

#### **A. Impact of Adult Behavior on Children’s Behavior**

The behavior of an adult in an emergency directly affects the physical and psychological safety of students in crisis. Therefore, the effectiveness of armed assailant drills relies on educating and training adults carefully, responsibly, and continually. Students look to faculty and staff—the designated trusted adults—for direction and guidance. When adults are well-trained and stay calm, the students will follow and gain confidence and ability.

#### **B. Developmental Levels of Safety Awareness**

If schools opt to conduct an options-based or more advanced armed assailant training, it is critical that those planning and facilitating the training consider the cognitive and emotional development of all those involved. Safety and security professionals (e.g., SROs, police officers) often have a leadership role in conducting drills but must work collaboratively with school administration and school-employed mental health professionals in joint planning to ensure best practice guidelines are followed. Schools, educators, and parents are encouraged to adapt policies and training programs that consider their unique situations. Grade levels are not an absolute determinant. Individual levels may vary greatly due to cultural, educational level, and personal profiles within a community. It is also imperative that schools consider the individual psychological backgrounds, previous trauma experiences (including community trauma history), special needs, and personalities of students and staff. Regardless of training level, some individual personality types are better able to respond assertively than others in moments of crisis. Each level has a corresponding age range and examples of appropriate types of activities and instructions to provide general guidance when preparing for an armed assailant training.

#### **C. Mental Health Support and Considerations**

School-employed mental health professionals should be a part of all stages of armed assailant drill preparation.

*Before an armed assailant drill or simulation.* Drills may lead to stressful or traumatic reactions. If the drill will be a sensorial experience with, for example, simulated gunfire or individuals being tackled by the assailant, then participation should never be mandated for staff or students. Staff should also be taught to recognize common trauma reactions to help identify when a student, fellow staff member, or him/herself needs to be removed from the drill. Additionally, drills should be conducted early enough in the day to allow for debriefing participants afterward and assessing any adverse reaction.

*During an armed assailant drill or simulation.* Educators must monitor the reactions of themselves, each other, and students during the drill and have a means to quickly notify drill coordinators if a person exhibits physical (e.g., asthma or panic attack) or

emotional (e.g., hysterical) reactions. Such reactions would necessitate removal from the drill and immediate support. School-employed health and mental health professionals must be present during the drill and available for assistance.

*After an armed assailant drill or simulation.* Emotional or physical reactions can be delayed following a highly intense simulation drill. School staff and students should have access to school-employed mental health professionals after the event to provide additional assistance if needed.

#### **D. Parent Consent**

Participation in an armed assailant drill should never be required for students or staff.

Parent consent can come in the form of:

- Parent permission – parents return a permission slip allowing their child to participate.
- Passive consent – parents return a form only if they do NOT want their child to participate; no form returned implies permission.
- Parent notification – parents are notified, but no consent form is used; thus, schools assume participation is granted unless parents assertively state otherwise.

#### **E. Balancing Staff Opt-Out with the Need for Universal Preparedness**

It is important to have all staff operating with the same understanding in an emergency situation. In cases where staff opt-out of a more advanced armed assailant drill, schools should provide the essential information and training through additional, less sensorial training exercises, such as a tabletop activity, as outlined in the hierarchy of education and training activities.

### **PART IV: STEPS TO CONDUCTING SAFE, EFFECTIVE, AND APPROPRIATE DRILLS**

1. **Create a school safety team—ideally made up of an administrator; school mental health professional; school nurse; teachers; security personnel; parents; and students—that:**

- Identifies a lead person to coordinate school safety efforts, including drills;
- Establishes and communicates the roles and responsibilities during drills and in real-life crisis situations;
- Takes a lead in identifying the most appropriate preparedness activities for the school;
- Provides ongoing professional development and training as needed; and
- Ensures that the school's policies are in compliance with state laws and school board policies.

2. **Conduct an assessment of the school community to:**

- Identify the types of crisis events most likely to occur,
- Determine the current school culture and climate,
- Map existing resources and capacities of school personnel or school safety

teams, and

- Identify any related policies that should be considered in the planning of drills.

3. Implement a cost–benefit analysis that:

- Considers financial costs in relation to the likelihood of a particular crisis;
- Identifies what resources, activities, or preparedness training must be replaced or postponed, to engage in active shooter or other armed assailant drills;
- Balances the need to empower school staff while minimizing potential harm (e.g., triggering stressful or traumatic reactions to live simulation drills);
- Considers the current knowledge and identified needs of the staff; and
- Considers legal requirements (e.g., state law) related to conducting active assailant drills and to what degree drills are required to be full-scale simulations versus other lower cost exercises.

4. Tailor drills to the context of the school environment, taking into consideration:

- The primary goal of the drill (e.g., training for law enforcement versus staff and/or students);
- Age, cognitive, and developmental levels of awareness of students;
- Students with physical, sensory, or other disabilities that may require unique instructions during a drill or real-life event;
- The capacity, comfort level, and trust among staff;
- Administrative support;
- Optimal timing, including time of year, day of the week, and time of the day;
- Relationships with external partners, law enforcement, and other first responders; and
- The layout of the RC.

5. Create a plan of progression that:

- Considers whether any previous activities have been conducted in the school;
- Starts with simple, low-cost, discussion-based exercises;
- Considers all available types of drills;
- Identifies specific objectives and goals for the drills; and
- Identifies a timeline and metrics to help determine whether more complex exercises are needed.

6. Prepare for logistics of the drill to ensure that:

- Previous traumatic experiences of those involved are considered;
- School staff learn to recognize stressful reactions to drills;
- Methods exist to opt out (for staff and students) or remove someone from a drill, including parental consent/permission if students are involved;

- **School-employed mental health professionals are available to provide support to those experiencing a negative reaction to the drill;**
- **Adequate follow up is available for students or staff with questions; and**
- **Appropriate methods to evaluate outcomes are implemented.**

**7. Develop a communications plan that:**

- **Informs members of the school community of planned drills and what will be entailed;**
- **Facilitates open communications with families, including translated materials and the opportunity for family members to talk with relevant staff about concerns;**
- **Provides opt-out options for staff and students; and**
- **Encourages feedback and evaluation by participants after the fact.**

**8. Establish a long-term follow up plan to support sustainability that considers:**

- **What additional training is required;**
- **How the drill integrates with other school safety and crisis prevention efforts;**
- **How current and previous training and knowledge can be maintained and built upon; and**
- **When follow-up should be conducted and how often.**

## **CONCLUSION**

**Training exercises and drills to prepare for active shooters or other armed assailants should be based on the specific needs and context of each school and community. It is critical that schools recognize that this type of drill is just one specific component of comprehensive crisis preparedness and response that includes prevention, protection, mitigation, response, and recovery. Schools should consider the most cost-effective method of preparing students and staff for an active shooter situation while balancing the physical and psychological risks associated with such drills.**

## **Suspension and Expulsion Policy for Audeo Charter School**

**Board Policy 3300**

**Adopted: May 11, 1998**

**Amended: May 13, 2009; September 22, 2020**

**This Pupil Suspension and Expulsion Policy has been established in order to promote learning and protect the safety and well-being of all students at Audeo Charter School ("Audeo" or "Charter School"). In creating this policy, Audeo Charter School has reviewed Education Code Section 48900 *et seq.* which describes the non-charter schools' list of offenses and procedures to establish its list of offenses and procedures for suspensions, expulsions and involuntary removal. The language that follows closely mirrors the language of Education Code Section 48900 *et seq.* Audeo Charter School is committed to annual review of policies and procedures surrounding suspensions, expulsions, and involuntary removals, and, as necessary, modification of the lists of offenses for which students are subject to suspension or expulsion.**

**Consistent with this Policy, it may be necessary to suspend or expel a student from regular classroom instruction. This policy shall serve as Audeo Charter School's policy and procedures for student suspension, expulsion, and involuntary removal, and it may be amended from time to time without the need to seek a material revision of the charter so long as the amendments comport with legal requirements. Audeo Charter School staff shall enforce disciplinary policies and procedures fairly and consistently among all students. This Policy and its Procedures will be printed and distributed annually as part of the Student Handbook and will clearly describe discipline expectations.**

**Corporal punishment shall not be used as a disciplinary measure against any student. Corporal punishment includes the willful infliction of or willfully causing the infliction of physical pain on a student. For purposes of this Policy, corporal punishment does not include an employee's use of force that is reasonable and necessary to protect the employee, students, staff or other persons or to prevent damage to school property.**

**The Audeo Charter School administration shall ensure that students and their parents/guardians are notified in writing upon enrollment of all discipline and involuntary removal policies and procedures. The notice shall state that the policy and procedures are available on request at the Administrator of Instructional Services's office. Suspended or expelled students shall be excluded from all school and school-related activities unless otherwise agreed during the period of suspension or expulsion.**

**A student identified as an individual with disabilities or for whom Audeo has a basis of knowledge of a suspected disability pursuant to the Individuals with Disabilities Education Improvement Act of 2004 ("IDEIA") or who is qualified for services under Section 504 of the Rehabilitation Act of 1973 ("Section 504") will be subject to the same**

grounds for suspension and expulsion and will be accorded the same due process procedures applicable to general education students except when federal and state law mandates additional or different procedures. Audeo Charter School will follow all applicable federal and state laws including but not limited to the California Education Code, when imposing any form of discipline on a student identified as an individual with disabilities or for whom Audeo Charter School has a basis of knowledge of a suspected disability or who is otherwise qualified for such services or protections in according due process to such students.

No student shall be involuntarily removed by the Charter School for any reason unless the parent/guardian of the student has been provided written notice of intent to remove the student no less than five (5) school days before the effective date of the action. The written notice shall be in the native language of the student or the student's parent/guardian or, if the student is a foster child or youth or a homeless child or youth, the student's educational rights holder, and shall inform the student, the student's parent/guardian, or educational rights holder of the basis for which the student is being involuntarily removed and the student's parent, guardian, or educational rights holder's right to request a hearing to challenge the involuntary removal. If a student's parent, guardian, or educational rights holder requests a hearing, the Charter School shall utilize the same hearing procedures specified below for expulsions, before the effective date of the action to involuntarily remove the student. If the student's parent, guardian, or educational rights holder requests a hearing, the student shall remain enrolled and shall not be removed until the Charter School issues a final decision. As used herein, "involuntarily removed" includes disenrolled, dismissed, transferred, or terminated, but does not include removals for misconduct which may be grounds for suspension or expulsion as enumerated below. Students may be involuntarily removed for reasons including, but not limited to, failure to comply with the terms of the student's independent study Master Agreement pursuant to Education Code Section 51747(c)(4).

## Procedures

### A. Grounds for Suspension and Expulsion of Students

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

### B. Enumerated Offenses

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

- a) **Caused, attempted to cause, or threatened to cause physical injury to another person.**
- b) **Willfully used force or violence upon the person of another, except self-defense.**
- c) **Unlawfully possessed, used, or otherwise furnished, or was under the influence of any controlled substance, as defined in Health and Safety Code Sections 11053- 11058, alcoholic beverage, or intoxicant of any kind.**
- d) **Unlawfully offered, arranged, or negotiated to sell any controlled substance as defined in Health and Safety Code Sections 11053-11058, alcoholic beverage or intoxicant of any kind, and then sold, delivered or otherwise furnished to any person another liquid substance or material and represented same as controlled substance, alcoholic beverage or intoxicant.**
- e) **Committed or attempted to commit robbery or extortion.**
- f) **Caused or attempted to cause damage to school property or private property, which includes but is not limited to, electronic files and databases.**
- g) **Stole or attempted to steal school property or private property, which includes but is not limited to, electronic files and databases.**
- h) **Possessed or used tobacco or products containing tobacco or nicotine products, including but not limited to cigars, cigarettes, miniature cigars, clove cigarettes, smokeless tobacco, snuff, chew packets and betel. This section does not prohibit the use of his or her own prescription products by a pupil.**
- i) **Committed an obscene act or engaged in habitual profanity or vulgarity.**
- j) **Unlawfully possessed or unlawfully offered, arranged, or negotiated to sell any drug paraphernalia, as defined in Health and Safety Code Section 11014.5.**
- k) **Disrupted school activities or otherwise willfully defied the valid authority of supervisors, teachers, administrators, other school officials, or other school personnel engaged in the performance of their duties.**

**This section shall only apply to students in any of grades 9-12, inclusive.**

- l) Knowingly received stolen school property or private property, which includes but is not limited to, electronic files and databases.**
- m) Possessed an imitation firearm, i.e.: a replica of a firearm that is so substantially similar in physical properties to an existing firearm as to lead a reasonable person to conclude that the replica is a firearm.**
- n) Harassed, threatened, or intimidated a student who is a complaining witness or witness in a school disciplinary proceeding for the purpose of preventing that student from being a witness and/or retaliating against that student for being a witness.**
- o) Unlawfully offered, arranged to sell, negotiated to sell, or sold the prescription drug Soma.**
- p) Engaged in, or attempted to engage in, hazing. For the purposes of this subdivision, "hazing" means a method of initiation or preinitiation into a pupil organization or body, whether or not the organization or body is officially recognized by an educational institution, which is likely to cause serious bodily injury or personal degradation or disgrace resulting in physical or mental harm to a former, current, or prospective pupil. For purposes of this section, "hazing" does not include athletic events or school-sanctioned events.**
- q) Made terroristic threats against school officials and/or school property, which includes but is not limited to, electronic files and databases. For purposes of this section, "terroristic threat" shall include any statement, whether written or oral, by a person who willfully threatens to commit a crime which will result in death, great bodily injury to another person, or property damage in excess of one thousand dollars (\$1,000), with the specific intent that the statement is to be taken as a threat, even if there is no intent of actually carrying it out, which, on its face and under the circumstances in which it is made, is so unequivocal, unconditional, immediate, and specific as to convey to the person threatened, a gravity of purpose and an immediate prospect of execution of the threat, and thereby causes that person reasonably to be in sustained fear for his or her own safety or for his or her immediate family's safety, or for the protection of school property, which includes but is not limited to, electronic files and databases, or the personal property of the person threatened or his or her immediate family.**
- r) Committed sexual harassment, as defined in Education Code Section**

**212.5. For the purposes of this section, the conduct described in Section 212.5 must be considered by a reasonable person of the same gender as the victim to be sufficiently severe or pervasive to have a negative impact upon the individual's academic performance or to create an intimidating, hostile, or offensive educational environment. This section shall apply to pupils in any of grades 4 to 12, inclusive.**

- s) Caused, attempted to cause, threaten to cause or participated in an act of hate violence, as defined in subdivision (e) of Section 233 of the Education Code. This section shall apply to pupils in any of grades 4 to 12, inclusive.**
- t) Intentionally harassed, threatened or intimidated school personnel or volunteers and/or a student or group of students to the extent of having the actual and reasonably expected effect of materially disrupting class work, creating substantial disorder and invading the rights of either school personnel or volunteers and/or student(s) by creating an intimidating or hostile educational environment. This section shall apply to pupils in any of grades 4 to 12, inclusive.**
- u) Engaged in an act of bullying, including, but not limited to, bullying committed by means of an electronic act.**
  - 1) "Bullying" means any severe or pervasive physical or verbal act or conduct, including communications made in writing or by means of an electronic act, and including one or more acts committed by a student or group of students which would be deemed hate violence or harassment, threats, or intimidation, which are directed toward one or more students that has or can be reasonably predicted to have the effect of one or more of the following:**
    - i. Placing a reasonable student (defined as a student, including, but is not limited to, a student with exceptional needs, who exercises average care, skill, and judgment in conduct for a person of his or her age, or for a person of his or her age with exceptional needs) or students in fear of harm to that student's or those students' person or property.**
    - ii. Causing a reasonable student to experience a substantially detrimental effect on his or her physical or mental health.**
    - iii. Causing a reasonable student to experience substantial interference with his or her academic performance.**
    - iv. Causing a reasonable student to experience substantial interference with his or her ability to participate in or benefit**

from the services, activities, or privileges provided by the Charter School.

- 2) **“Electronic Act”** means the creation or transmission originated on or off the schoolsite, by means of an electronic device, including, but not limited to, a telephone, wireless telephone, or other wireless communication device, computer, or pager, of a communication, including, but not limited to, any of the following:
- i. A message, text, sound, video, or image.
  - ii. A post on a social network Internet Web site including, but not limited to:
    - (a) Posting to or creating a burn page. A **“burn page”** means an Internet Web site created for the purpose of having one or more of the effects as listed in subparagraph (1) above.
      - (1) Creating a credible impersonation of another actual pupil for the purpose of having one or more of the effects listed in subparagraph above.
      - (2) **“Credible impersonation”** means to knowingly and without consent impersonate a pupil for the purpose of bullying the pupil and such that another pupil would reasonably believe, or has reasonably believed, that the pupil was or is the pupil who was impersonated.
    - (b) Creating a false profile for the purpose of having one or more of the effects listed in subparagraph (1) above. **“False profile”** means a profile of a fictitious pupil or a profile using the likeness or attributes of an actual pupil other than the pupil who created the false profile.
  - iii. An act of cyber sexual bullying.
    - (a) For purposes of this policy, **“cyber sexual bullying”** means the dissemination of, or the solicitation or incitement to disseminate, a photograph or other visual recording by a student to another student or to school personnel by means of an electronic act that has or can be reasonably predicted to have one or more of the effects described in subparagraphs (i) to (iv), inclusive, of paragraph (1). A photograph or other visual recording, as described above, shall include the depiction of a nude, semi-nude, or sexually explicit photograph or other visual recording of a minor where the minor is identifiable from the photograph, visual recording, or other electronic act.

**(b) For purposes of this policy, “cyber sexual bullying” does not include a depiction, portrayal, or image that has any serious literary, artistic, educational, political, or scientific value or that involves athletic events or school-sanctioned activities.**

**3) Notwithstanding subparagraphs (1) and (2) above, an electronic act shall not constitute pervasive conduct solely on the basis that it has been transmitted on the Internet or is currently posted on the Internet.**

**v) A pupil who aids or abets, as defined in Section 31 of the Penal Code, the infliction or attempted infliction of physical injury to another person may be subject to suspension, but not expulsion, except that a pupil who has been adjudged by a juvenile court to have committed, as an aider and abettor, a crime of physical violence in which the victim suffered great bodily injury or serious bodily injury shall be subject to discipline pursuant to subdivision (1)(a)-(b).**

**w) Possessed, sold, or otherwise furnished any knife or other dangerous object of no reasonable use to the student unless, in the case of possession of any object of this type, the student had obtained written permission to possess the item from a certificated school employee, with the Administrator of Instructional Services or designee’s concurrence.**

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

**a) Possessed, sold, or otherwise furnished any firearm, explosive, or other destructive device unless, in the case of possession of any device of this type, the student had obtained written permission to possess the item from a certificated school employee, with the Administrator of Instructional Services or designee’s concurrence.**

**b) Brandished a knife at another person.**

**c) Unlawfully sold a controlled substance listed in Health and Safety Code Section 11053, et seq.**

**d) Committed or attempted to commit a sexual assault or committed a sexual battery as defined in Penal Code Sections 261, 266c, 286, 287, 288, or 289 of former Section 288a of the Penal Code or committed a sexual battery as defined in Penal Code Section 243.4**

**3. Discretionary Expellable Offenses: Students may be recommended for**

**expulsion for any of the following acts when it is determined the pupil:**

- a) Caused, attempted to cause, or threatened to cause physical injury to another person.**
- b) Willfully used force or violence upon the person of another, except self-defense.**
- c) Unlawfully possessed, used, or otherwise furnished, or was under the influence of any controlled substance, as defined in Health and Safety Code Sections 11053- 11058, alcoholic beverage, or intoxicant of any kind.**
- d) Unlawfully offered, arranged, or negotiated to sell any controlled substance as defined in Health and Safety Code Sections 11053-11058, alcoholic beverage or intoxicant of any kind, and then sold, delivered or otherwise furnished to any person another liquid substance or material and represented same as controlled substance, alcoholic beverage or intoxicant.**
- e) Committed or attempted to commit robbery or extortion.**
- f) Caused or attempted to cause damage to school property or private property, which includes but is not limited to, electronic files and databases.**
- g) Stole or attempted to steal school property or private property, which includes but is not limited to, electronic files and databases.**
- h) Possessed or used tobacco or products containing tobacco or nicotine products, including but not limited to cigars, cigarettes, miniature cigars, clove cigarettes, smokeless tobacco, snuff, chew packets and betel. This section does not prohibit the use of his or her own prescription products by a pupil.**
- i) Committed an obscene act or engaged in habitual profanity or vulgarity.**
- j) Unlawfully possessed or unlawfully offered, arranged, or negotiated to sell any drug paraphernalia, as defined in Health and Safety Code Section 11014.5.**
- k) Knowingly received stolen school property or private property, which includes but is not limited to, electronic files and databases.**

- l) Possessed an imitation firearm, i.e.: a replica of a firearm that is so substantially similar in physical properties to an existing firearm as to lead a reasonable person to conclude that the replica is a firearm.**
- m) Harassed, threatened, or intimidated a student who is a complaining witness or witness in a school disciplinary proceeding for the purpose of preventing that student from being a witness and/or retaliating against that student for being a witness.**
- n) Unlawfully offered, arranged to sell, negotiated to sell, or sold the prescription drug Soma.**
- o) Engaged in, or attempted to engage in, hazing. For the purposes of this subdivision, "hazing" means a method of initiation or preinitiation into a pupil organization or body, whether or not the organization or body is officially recognized by an educational institution, which is likely to cause serious bodily injury or personal degradation or disgrace resulting in physical or mental harm to a former, current, or prospective pupil. For purposes of this section, "hazing" does not include athletic events or school-sanctioned events.**
- p) Made terroristic threats against school officials and/or school property, which includes but is not limited to, electronic files and databases. For purposes of this section, "terroristic threat" shall include any statement, whether written or oral, by a person who willfully threatens to commit a crime which will result in death, great bodily injury to another person, or property damage in excess of one thousand dollars (\$1,000), with the specific intent that the statement is to be taken as a threat, even if there is no intent of actually carrying it out, which, on its face and under the circumstances in which it is made, is so unequivocal, unconditional, immediate, and specific as to convey to the person threatened, a gravity of purpose and an immediate prospect of execution of the threat, and thereby causes that person reasonably to be in sustained fear for his or her own safety or for his or her immediate family's safety, or for the protection of school property, which includes but is not limited to, electronic files and databases, or the personal property of the person threatened or his or her immediate family.**
- q) Committed sexual harassment, as defined in Education Code Section 212.5. For the purposes of this section, the conduct described in Section 212.5 must be considered by a reasonable person of the same gender as the victim to be sufficiently severe or pervasive to have a negative impact upon the individual's academic performance or to create an intimidating,**

**hostile, or offensive educational environment. This section shall apply to pupils in any of grades 4 to 12, inclusive.**

- r) Caused, attempted to cause, threatened to cause or participated in an act of hate violence, as defined in subdivision (e) of Section 233 of the Education Code. This section shall apply to pupils in any of grades 4 to 12, inclusive.**
- s) Intentionally harassed, threatened or intimidated school personnel or volunteers and/or a student or group of students to the extent of having the actual and reasonably expected effect of materially disrupting class work, creating substantial disorder and invading the rights of either school personnel or volunteers and/or student(s) by creating an intimidating or hostile educational environment. This section shall apply to pupils in any of grades 4 to 12, inclusive.**
- t) Engaged in an act of bullying, including, but not limited to, bullying committed by means of an electronic act.**
  - 1) "Bullying" means any severe or pervasive physical or verbal act or conduct, including communications made in writing or by means of an electronic act, and including one or more acts committed by a student or group of students which would be deemed hate violence or harassment, threats, or intimidation, which are directed toward one or more students that has or can be reasonably predicted to have the effect of one or more of the following:**
    - i. Placing a reasonable student (defined as a student, including, but is not limited to, a student with exceptional needs, who exercises average care, skill, and judgment in conduct for a person of his or her age, or for a person of his or her age with exceptional needs) or students in fear of harm to that student's or those students' person or property.**
    - ii. Causing a reasonable student to experience a substantially detrimental effect on his or her physical or mental health.**
    - iii. Causing a reasonable student to experience substantial interference with his or her academic performance.**
    - iv. Causing a reasonable student to experience substantial interference with his or her ability to participate in or benefit from the services, activities, or privileges provided by the Charter School.**

- 2) **“Electronic Act” means the creation or transmission originated on or off the school site, by means of an electronic device, including, but not limited to, a telephone, wireless telephone, or other wireless communication device, computer, or pager, of a communication, including, but not limited to, any of the following:**
- i. A message, text, sound, video, or image.**
  - ii. A post on a social network Internet Web site including, but not limited to:**
    - (a) Posting to or creating a burn page. A “burn page” means an InternetWeb site created for the purpose of having one or more of the effectsas listed in subparagraph (1) above.**
    - (b) Creating a credible impersonation of another actual pupil for the purpose of having one or more of the effects listed in subparagraph above.**
      - (1) “Credible impersonation” means to knowingly and without consent impersonate a pupil for the purpose of bullying the pupil and such that another pupil would reasonably believe, or has reasonably believed, that the pupil was or is the pupil who was impersonated.**
    - (c) Creating a false profile for the purpose of having one or more of theeffects listed in subparagraph (1) above. “False profile” means a profile of a fictitious pupil or a profile using the likeness or attributesof an actual pupil other than the pupil who created the false profile.**
  - iii. An act of cyber sexual bullying.**
    - (a) For purposes of this policy, “cyber sexual bullying” means the dissemination of, or the solicitation or incitement to disseminate, a photograph or other visual recording by a student to another student or to school personnel by means of an electronic act that has or can be reasonably predicted to have one or more of the effects described in subparagraphs (i) to (iv), inclusive, of paragraph (1). A photograph or other visual recording, as described above, shall include the depiction of a nude, semi-nude, or sexually explicit photograph or other visual recording of a minor where the minor is identifiable from the photograph, visual recording, or other**

electronic act.

(b) For purposes of this policy, “cyber sexual bullying” does not include a depiction, portrayal, or image that has any serious literary, artistic, educational, political, or scientific value or that involves athletic events or school-sanctioned activities.

3) Notwithstanding subparagraphs (1) and (2) above, an electronic act shall not constitute pervasive conduct solely on the basis that it has been transmitted on the Internet or is currently posted on the Internet.

u) A pupil who aids or abets, as defined in Section 31 of the Penal Code, the infliction or attempted infliction of physical injury to another person may be subject to suspension, but not expulsion, except that a pupil who has been adjudged by a juvenile court to have committed, as an aider and abettor, a crime of physical violence in which the victim suffered great bodily injury or serious bodily injury shall be subject to discipline pursuant to subdivision (3)(a)-(b).

v) Possessed, sold, or otherwise furnished any knife or other dangerous object of no reasonable use to the student unless, in the case of possession of any object of this type, the student had obtained written permission to possess the item from a certificated school employee, with the Administrator of Instructional Services or designee’s concurrence.

4. **Non-Discretionary Expellable Offenses:** Students must be recommended for expulsion for any of the following acts when it is determined pursuant to the procedures below that the pupil:

a) Possessed, sold, or otherwise furnished any firearm, explosive, or other destructive device unless, in the case of possession of any device of this type, the student had obtained written permission to possess the item from a certificated school employee, with the Administrator of Instructional Services or designee’s concurrence.

b) Brandished a knife at another person.

c) Unlawfully sold a controlled substance listed in Health and Safety Code Section 11053, et seq.

d) Committed or attempted to commit a sexual assault or committed a sexual battery as defined in Penal Code Sections 261, 266c, 286, 287, 288,

or 289 of former Section 288a of the Penal Code or committed a sexual battery as defined in Penal Code Section 243.4.

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

The Charter School will use the following definitions:

- The term “knife” means (A) any dirk, dagger, or other weapon with a fixed, sharpened blade fitted primarily for stabbing; (B) a weapon with a blade fitted primarily for stabbing; (C) a weapon with a blade longer than 3½ inches; (D) a folding knife with a blade that locks into place; or (E) a razor with an unguarded blade.
- The term “firearm” means (A) any weapon (including a starter gun) which will or is designed to or may readily be converted to expel a projectile by the action of an explosive; (B) the frame or receiver of any such weapon; (C) any firearm muffler or firearm silencer; or (D) any destructive device. Such term does not include an antique firearm.
- The term “destructive device” means any explosive, incendiary, or poison gas, including but not limited to: (A) bomb; (B) grenade; (C) rocket having a propellant charge of more than four ounces; (D) missile having an explosive or incendiary charge of more than one-quarter ounce; (E) mine; or (F) device similar to any of the devices described in the preceding clauses.

### C. Suspension Procedure

Suspensions shall be initiated according to the following procedures:

#### 5. Conference

Suspension shall be preceded, if possible, by a conference conducted by the Administrator of Instructional Services or designee with the student and his or her parent/guardian and, whenever practical, the teacher, supervisor or Audeo Charter School employee who referred the student to the Administrator of Instructional Services or designee.

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

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

#### **6. Notice to Parents/Guardians**

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

#### **7. Suspension Time Limits/Recommendation for Expulsion**

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

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

#### **8. Homework Assignments During Suspension**

In accordance with Education Code Section 47606.2(a), upon the request of a parent, a legal guardian or other person holding the right to make education decisions for the student, or the affected student, a teacher shall provide to a student in any of grades 1 to 12, inclusive, who has been suspended from school for two (2) or more school days, the homework that the student would otherwise have been assigned.

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

#### **D. Authority to Expel**

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

A student may be expelled either by the neutral and impartial Charter school Board of Directors following a hearing before it or by the Board of Directors upon the recommendation of a neutral and impartial Administrative Panel, to be assigned by the Board of Directors as needed. The Administrative Panel shall consist of at least three (3) members who are certificated and neither a teacher of the pupil nor a member of the Charter School Board of Directors. Each entity shall be presided over by a designated neutral hearing chairperson. The Administrative Panel may recommend expulsion of any student found to have committed an expellable offense, and the Board of Directors shall make the final determination.

#### **E. Expulsion Procedures**

Students recommended for expulsion are entitled to a hearing to determine whether the student should be expelled. Unless postponed for good cause, the hearing shall be held within thirty (30) school days after the Administrator of Instructional Services or

designee determines that the pupil has committed an expellable offense and recommends the student for expulsion.

In the event an Administrative Panel hears the case, it will make a recommendation to the Board for a final decision whether to expel. The hearing shall be held in closed session (complying with all pupil confidentiality rules under the Family Educational Rights and Privacy Act "FERPA") unless the pupil makes a written request for a public hearing in open session three (3) days prior to the date of the scheduled hearing.

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

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

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

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

17. The complaining witness in any sexual assault or battery case must be provided with a copy of the applicable disciplinary rules and advised of his/her right to (a) receive five (5) calendar days' notice of his/her scheduled testimony; (b) have up to two (2) adult support persons of

his/her choosing present in the hearing at the time he/she testifies, which may include a parent/guardian or legal counsel; and (c) elect to have the hearing closed while testifying.

18. Audeo Charter School must also provide the victim a room separate from the hearing room for the complaining witness' use prior to and during breaks in testimony.
19. At the discretion of the entity conducting the expulsion hearing, the complaining witness shall be allowed periods of relief from examination and cross-examination during which he or she may leave the hearing room.
20. The entity conducting the expulsion hearing may also arrange the seating within the hearing room to facilitate a less intimidating environment for the complaining witness.
21. The entity conducting the expulsion hearing may also limit time for taking the testimony of the complaining witness to the hours he/she is normally in school, if there is no good cause to take the testimony during other hours.
22. Prior to a complaining witness testifying, the support persons must be admonished that the hearing is confidential. Nothing in the law precludes the entity presiding over the hearing from removing a support person whom the presiding person finds is disrupting the hearing. The entity conducting the hearing may permit any one of the support persons for the complaining witness to accompany him or her to the witness stand.
23. If one or both of the support persons is also a witness, Audeo must present evidence that the witness' presence is both desired by the witness and will be helpful to Audeo Charter School. The entity presiding over the hearing shall permit the witness to stay unless it is established that there is a substantial risk that the testimony of the complaining witness would be influenced by the support person, in which case the presiding official shall admonish the support person or persons not to prompt, sway, or influence the witness in any way. Nothing shall preclude the presiding officer from exercising his or her discretion to remove a person from the hearing whom he or she believes is prompting, swaying, or influencing the witness.
24. The testimony of the support person shall be presented before the testimony of the complaining witness and the complaining witness shall

be excluded from the courtroom during that testimony.

25. Especially for charges involving sexual assault or battery, if the hearing is to be conducted in public at the request of the pupil being expelled, the complaining witness shall have the right to have his/her testimony heard in a closed session when testifying at a public meeting would threaten serious psychological harm to the complaining witness and there are no alternative procedures to avoid the threatened harm. The alternative procedures may include videotaped depositions or contemporaneous examination in another place communicated to the hearing room by means of closed-circuit television.
26. Evidence of specific instances of a complaining witness' prior sexual conduct is presumed inadmissible and shall not be heard absent a determination by the entity conducting the hearing that extraordinary circumstances exist requiring the evidence be heard. Before such a determination regarding extraordinary circumstance can be made, the witness shall be provided notice and an opportunity to present opposition to the introduction of the evidence. In the hearing on the admissibility of the evidence, the complaining witness shall be entitled to be represented by a parent, legal counsel, or other support person. Reputation or opinion evidence regarding the sexual behavior of the complaining witness is not admissible for any purpose.

#### **G. Record of Hearing**

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

#### **H. Presentation of Evidence**

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

If, due to a written request by the expelled pupil, the hearing is held at a public meeting, and the charge is committing or attempting to commit a sexual assault or committing a sexual battery as defined in Education Code Section 48900, a complaining witness shall have the right to have his or her testimony heard in a session closed to the public.

#### **I. Expulsion Decision**

The decision of the Administrative Panel shall be in the form of written findings of fact and a written recommendation to the Board of Directors, who will make a final determination regarding the expulsion. The Board of Directors shall make the final determination regarding the expulsion within ten (10) school days following the conclusion of the hearing. The decision of the Board is final.

If the Administrative Panel decides not to recommend expulsion, or the Board of Directors ultimately decides not to expel, the student shall immediately be returned to his/her educational program.

The Board of Directors may also determine to suspend the enforcement of the expulsion order for a period of not more than one (1) calendar year from the date of the expulsion hearing and return the student to the student's previous educational program under a probationary status and rehabilitation plan to be determined by the Board. During the period of the suspension of the expulsion order, the student is deemed to be on probationary status. The Board of Directors may revoke the suspension of an expulsion order under this section if the student commits any of the enumerated offenses listed above or violates any of the Charter School's rules and regulations governing student conduct. If the Board revokes the suspension of an expulsion order, the student may be expelled under the terms of the original expulsion order. The Board of Directors shall apply the criteria for suspending the enforcement of the expulsion order equally to all students, including individuals with exceptional needs as defined in Education Code Section 56026. The Board of Directors shall further comply with the provisions set forth under Education Code Section 48917, except as otherwise expressly set forth herein.

#### **J. Written Notice to Expel**

The Administrator of Instructional Services or designee, following a decision of the Board of to expel, shall send written notice of the decision to expel, including the Board's adopted findings of fact, to the student and student's parent/guardian. This notice shall also include the following: Notice of the specific offense committed by the student; and Notice of the student's or parent/guardian's obligation to inform any new district in which the student seeks to enroll of the student's status with Audeo. The Administrator of Instructional Services or designee shall send a copy of the written

notice of the decision to expel to the authorizer. This notice shall include the following:  
a) The student's name b) The specific expellable offense committed by the student.

#### **K. Disciplinary Records**

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

#### **L. No Right to Appeal**

The student shall have no right of appeal from expulsion from Audeo Charter School as the Student Success Programs Board of Directors' decision to expel shall be final.

#### **M. Expelled Pupils/Alternative Education**

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

#### **N. Rehabilitation Plans**

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

#### **O. Readmission or Admission of Previously Expelled Student**

The decision to readmit a pupil after the end of the student's expulsion term or to admit a previously expelled pupil from another school district or Audeo who has not been readmitted/admitted to another school or school district after the end of the student's expulsion term, shall be in the sole discretion of the Board following a meeting with the Administrator of Instructional Services or designee and the pupil and parent/guardian or representative to determine whether the pupil has successfully completed the rehabilitation plan and to determine whether the pupil poses a threat to others or will be disruptive to the school environment. The Administrator of Instructional Services or designee shall make a recommendation to the Board following the meeting regarding his or her determination. The Board shall

then make a final decision regarding readmission or admission of the student during the closed session of a public meeting, reporting out any action taken during closed session consistent with the requirements of the Brown Act. The pupil's readmission is also contingent upon Audeo Charter School capacity at the time the student seeks readmission or admission to the Charter School.

#### **P. Notice to Teachers**

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

#### **Q. Special Procedures for the Consideration of Suspension and Expulsion or Involuntary Removal of Students with Disabilities**

##### **27. Notification of SELPA**

Audeo Charter School shall immediately notify the SELPA and coordinate the procedures in this policy with the SELPA of the discipline of any student with a disability or student that Audeo Charter School or the SELPA would be deemed to have knowledge that the student had a disability.

##### **28. Services During Suspension**

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

##### **29. Procedural Safeguards/Manifestation Determination**

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

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

**If Audeo Charter School, the parent, and relevant members of the IEP/504 Team determine that either of the above is applicable for the child, the conduct shall be determined to be a manifestation of the child's disability.**

**If Audeo Charter School, the parent, and relevant members of the IEP/504 Team make the determination that the conduct was a manifestation of the child's disability, the IEP/504 Team shall:**

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

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

### **30. Due Process Appeals**

**The parent/guardian of a child with a disability who disagrees with any decision regarding placement, or the manifestation determination, or Audeo Charter School believes that maintaining the current placement of the child is substantially likely to result in injury to the child or to others, may request an expedited administrative hearing through the Special Education Unit of the**

**Office of Administrative Hearings or by utilizing the dispute provisions of the 504 Policy and Procedures.**

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

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

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

### **31. Special Circumstances**

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

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

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

upon a person while at school, on school premises, or at a school function.

### **32. Interim Alternative Educational Setting**

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

### **33. Procedures for Students Not Yet Eligible for Special Education Services**

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

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

- a. The parent/guardian has expressed concern in writing, or orally if the parent/guardian does not know how to write or has a disability that prevents a written statement, to Audeo Charter School supervisory or administrative personnel, or to one of the child's teachers, that the student is in need of special education or related services.
- b. The parent/guardian has requested an evaluation of the child.
- c. The child's teacher, or other Audeo Charter School personnel, has expressed specific concerns about a pattern of behavior demonstrated by the child, directly to the director of special education or to other Audeo supervisory personnel.

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

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

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

## **Suspension and Expulsion Policy for Charter School of San Diego**

**Approved: May 11, 1998**

**Amended: May 13, 2009, September 14, 2017, February 17, 2021**

The Suspension and Expulsion Policy and Procedures have been established in order to promote learning and protect the safety and wellbeing of all students at the Charter School of San Diego ("CSSD" or "Charter School"). In creating this policy, CSSD has reviewed Education Code Section 48900 *et seq.* which describes the non-charter schools' list of offenses and procedures to establish its list of offenses and procedures for suspensions, expulsions and involuntary removal. The language that follows closely mirrors the language of Education Code Section 48900 *et seq.* CSSD is committed to annual review of policies and procedures surrounding suspensions, expulsions, and involuntary removals, and, as necessary, modification of the lists of offenses for which students are subject to suspension or expulsion.

When the policy is violated, it may be necessary to suspend or expel a student from regular classroom instruction. This policy shall serve as CSSD's policy and procedures for student suspension, expulsion, and involuntary removal, and it may be amended from time to time without the need to amend the charter so long as the amendments comport with legal requirements. CSSD staff shall enforce disciplinary rules and procedures fairly and consistently among all students. This policy and its procedures will be printed and distributed as part of the student handbook and will clearly describe discipline expectations.

Corporal punishment shall not be used as a disciplinary measure against any student. Corporal punishment includes the willful infliction of or willfully causing the infliction of physical pain on a student. For purposes of this policy, corporal punishment does not include an employee's use of force that is reasonable and necessary to protect the employee, students, staff or other persons or to prevent damage to school property.

The CSSD administration shall ensure that students and their parents/guardians are notified in writing upon enrollment of all discipline and involuntary removal policies and procedures. The notice shall state that this policy and procedures are available upon request at the Executive Director's office.

Suspended or expelled students shall be excluded from all school and school-related activities unless otherwise agreed during the period of suspension or expulsion.

A student identified as an individual with disabilities or for whom CSSD has a basis of knowledge of a suspected disability pursuant to the Individuals with Disabilities Education Improvement Act of 2004 ("IDEA") or who is qualified for services under Section 504 of the Rehabilitation Act of 1973 ("Section 504") is subject to the same

grounds for suspension and expulsion and is accorded the same due process procedures applicable to general education students except when federal and state law mandates additional or different procedures. CSSD will follow all applicable federal and state laws including but not limited to the applicable provisions of the California Education Code, when imposing any form of discipline on a student identified as an individual with disabilities or for whom CSSD has a basis of knowledge of a suspected disability or who is otherwise qualified for such services or protections in according to due process to such students.

No student shall be involuntarily removed by the Charter School for any reason unless the parent/guardian of the student has been provided written notice of intent to remove the student no less than five (5) school days before the effective date of the action. The written notice shall be in the native language of the student or the student's parent/guardian or, if the student is a foster child or youth or a homeless child or youth, the student's educational rights holder, and shall inform the student, the student's parent/guardian, or educational rights holder of the basis for which the student is being involuntarily removed and the student's parent, guardian, or educational rights holder's right to request a hearing to challenge the involuntary removal. If a student's parent, guardian, or educational rights holder requests a hearing, the Charter School shall utilize the same hearing procedures specified below for expulsions, before the effective date of the action to involuntarily remove the student. If the student's parent, guardian, or educational rights holder requests a hearing, the student shall remain enrolled and shall not be removed until the Charter School issues a final decision. As used herein, "involuntarily removed" includes disenrolled, dismissed, transferred, or terminated, but does not include removals for misconduct which may be grounds for suspension or expulsion as enumerated below. Students may be involuntarily removed for reasons including, but not limited to, failure to comply with the terms of the student's independent study Master Agreement pursuant to Education Code Section 51747(c)(4).

## Procedures

### **A. Grounds for Suspension and Expulsion of Students**

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

### **B. Enumerated Offenses**

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

- a) **Caused, attempted to cause, or threatened to cause physical injury to another person.**
- b) **Willfully used force or violence upon the person of another, except self-defense.**
- c) **Unlawfully possessed, used, or otherwise furnished, or was under the influence of any controlled substance, as defined in Health and Safety Code Sections 11053-11058, alcoholic beverage, or intoxicant of any kind.**
- d) **Unlawfully offered, arranged, or negotiated to sell any controlled substance as defined in Health and Safety Code Sections 11053-11058, alcoholic beverage or intoxicant of any kind, and then sold, delivered or otherwise furnished to any person another liquid substance or material and represented same as controlled substance, alcoholic beverage or intoxicant.**
- e) **Committed or attempted to commit robbery or extortion.**
- f) **Caused or attempted to cause damage to school property or private property, which includes but is not limited to, electronic files and databases.**
- g) **Stole or attempted to steal school property or private property, which includes but is not limited to, electronic files and databases.**
- h) **Possessed or used tobacco or products containing tobacco or nicotine products, including but not limited to cigars, cigarettes, miniature cigars, clove cigarettes, smokeless tobacco, snuff, chew packets and betel. This section does not prohibit the use of his or her own prescription products by a pupil.**
- i) **Committed an obscene act or engaged in habitual profanity or vulgarity.**
- j) **Unlawfully possessed or unlawfully offered, arranged, or negotiated to sell any drug paraphernalia, as defined in Health and Safety Code Section 11014.5.**
- k) **Disrupted school activities or otherwise willfully defied the valid authority of supervisors, teachers, administrators, other school officials, or other school personnel engaged in the performance of their duties. This section shall only apply to students in any of grades 9-12, inclusive.**

- l) Knowingly received stolen school property or private property, which includes but is not limited to, electronic files and databases.**
- m) Possessed an imitation firearm, i.e.: a replica of a firearm that is so substantially similar in physical properties to an existing firearm as to lead a reasonable person to conclude that the replica is a firearm.**
- n) Harassed, threatened, or intimidated a student who is a complaining witness or witness in a school disciplinary proceeding for the purpose of preventing that student from being a witness and/or retaliating against that student for being a witness.**
- o) Unlawfully offered, arranged to sell, negotiated to sell, or sold the prescription drug Soma.**
- p) Engaged in, or attempted to engage in, hazing. For the purposes of this subdivision, "hazing" means a method of initiation or preinitiation into a pupil organization or body, whether or not the organization or body is officially recognized by an educational institution, which is likely to cause serious bodily injury or personal degradation or disgrace resulting in physical or mental harm to a former, current, or prospective pupil. For purposes of this section, "hazing" does not include athletic events or school-sanctioned events.**
- q) Made terroristic threats against school officials and/or school property, which includes but is not limited to, electronic files and databases. For purposes of this section, "terroristic threat" shall include any statement, whether written or oral, by a person who willfully threatens to commit a crime which will result in death, great bodily injury to another person, or property damage in excess of one thousand dollars (\$1,000), with the specific intent that the statement is to be taken as a threat, even if there is no intent of actually carrying it out, which, on its face and under the circumstances in which it is made, is so unequivocal, unconditional, immediate, and specific as to convey to the person threatened, a gravity of purpose and an immediate prospect of execution of the threat, and thereby causes that person reasonably to be in sustained fear for his or her own safety or for his or her immediate family's safety, or for the protection of school property, which includes but is not limited to, electronic files and databases, or the personal property of the person threatened or his or her immediate family.**

- r) **Committed sexual harassment, as defined in Education Code Section 212.5. For the purposes of this section, the conduct described in Section 212.5 must be considered by a reasonable person of the same gender as the victim to be sufficiently severe or pervasive to have a negative impact upon the individual's academic performance or to create an intimidating, hostile, or offensive educational environment. This section shall apply to pupils in any of grades 4 to 12, inclusive.**
- s) **Caused, attempted to cause, threatened to cause or participated in an act of hate violence, as defined in subdivision (e) of Section 233 of the Education Code. This section shall apply to pupils in any of grades 4 to 12, inclusive.**
- t) **Intentionally harassed, threatened, or intimidated school personnel or volunteers and/or a student or group of students to the extent of having the actual and reasonably expected effect of materially disrupting class work, creating substantial disorder and invading the rights of either school personnel or volunteers and/or student(s) by creating an intimidating or hostile educational environment. This section shall apply to pupils in any of grades 4 to 12, inclusive.**
- u) **Engaged in an act of bullying, including, but not limited to, bullying committed by means of an electronic act.**

**C.**

- 1) **"Bullying" means any severe or pervasive physical or verbal act or conduct, including communications made in writing or by means of an electronic act, and including one or more acts committed by a student or group of students which would be deemed hate violence or harassment, threats, or intimidation, which are directed toward one or more students that has or can be reasonably predicted to have the effect of one or more of the following:**
  - i. **Placing a reasonable student (defined as a student, including, but is not limited to, a student with exceptional needs, who exercises average care, skill, and judgment in conduct for a person of his or her age, or for a person of his or her age with exceptional needs) or students in fear of harm to that student's or those students' person or property.**
  - ii. **Causing a reasonable student to experience a substantially detrimental effect on his or her physical or mental health.**
  - iii. **Causing a reasonable student to experience substantial interference with his or her academic performance.**

- iv. **Causing a reasonable student to experience substantial interference with his or her ability to participate in or benefit from the services, activities, or privileges provided by the Charter School.**
- 2) **“Electronic Act” means the creation or transmission originated on or off the school site, by means of an electronic device, including, but not limited to, a telephone, wireless telephone, or other wireless communication device, computer, or pager, of a communication, including, but not limited to, any of the following:**
- i. **A message, text, sound, video, or image.**
  - ii. **A post on a social network Internet Web site including, but not limited to:**
    - (a) **Posting to or creating a burn page. A “burn page” means an Internet Web site created for the purpose of having one or more of the effects as listed in subparagraph (1) above.**
    - (b) **Creating a credible impersonation of another actual pupil for the purpose of having one or more of the effects listed in subparagraph (1) above. “Credible impersonation” means to knowingly and without consent impersonate a pupil for the purpose of bullying the pupil and such that another pupil would reasonably believe, or has reasonably believed, that the pupil was or is the pupil who was impersonated.**
    - (c) **Creating a false profile for the purpose of having one or more of the effects listed in subparagraph (1) above. “False profile” means a profile of a fictitious pupil or a profile using the likeness or attributes of an actual pupil other than the pupil who created the false profile.**
  - iii. **An act of cyber sexual bullying.**
    - (a) **For purposes of this clause, “cyber sexual bullying” means the dissemination of, or the solicitation or incitement to disseminate, a photograph or other visual recording by a pupil to another pupil or to school personnel by means of an electronic act that has or can be reasonably predicted to have one or more of the effects described in subparagraphs (i) to (iv), inclusive, of paragraph (1). A photograph or other visual recording, as described above, shall include the depiction of a nude, semi-nude, or sexually explicit photograph or other visual recording of a minor where the minor is identifiable**

from the photograph, visual recording, or other electronic act.

(b) For purposes of this clause, “cyber sexual bullying” does not include a depiction, portrayal, or image that has any serious literary, artistic, educational, political, or scientific value or that involves athletic events or school-sanctioned activities.

3) Notwithstanding subparagraphs (1) and (2) above, an electronic act shall not constitute pervasive conduct solely on the basis that it has been transmitted on the Internet or is currently posted on the Internet.

v) A pupil who aids or abets, as defined in Section 31 of the Penal Code, the infliction or attempted infliction of physical injury to another person may be subject to suspension, but not expulsion, except that a pupil who has been adjudged by a juvenile court to have committed, as an aider and abettor, a crime of physical violence in which the victim suffered great bodily injury or serious bodily injury shall be subject to discipline pursuant to subdivision (1)(a)-(b).

D.

w) Possessed, sold, or otherwise furnished any knife or other dangerous object of no reasonable use to the student unless, in the case of possession of any object of this type, the student had obtained written permission to possess the item from a certificated school employee, with the Executive Director or designee’s concurrence.

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

a) Possessed, sold, or otherwise furnished any firearm, explosive, or other destructive device unless, in the case of possession of any device of this type, the student had obtained written permission to possess the item from a certificated school employee, with the Administrator of Instructional Services or designee’s concurrence.

b) Brandished a knife at another person.

c) Unlawfully sold a controlled substance listed in Health and Safety Code Section 11053, et seq.

d) Committed or attempted to commit a sexual assault or committed a sexual battery as defined in Penal Code Sections 261, 266c, 286, 287, 288, or 289

of former Section 288a of the Penal Code or committed a sexual battery as defined in Penal Code Section 243.4

- 3. Discretionary Expellable Offenses: Students may be recommended for expulsion for any of the following acts when it is determined the pupil:**
- a) Caused, attempted to cause, or threatened to cause physical injury to another person.**
  - b) Willfully used force or violence upon the person of another, except self-defense.**
  - c) Unlawfully possessed, used, or otherwise furnished, or was under the influence of any controlled substance, as defined in Health and Safety Code Sections 11053-11058, alcoholic beverage, or intoxicant of any kind.**
  - d) Unlawfully offered, arranged, or negotiated to sell any controlled substance as defined in Health and Safety Code Sections 11053-11058, alcoholic beverage or intoxicant of any kind, and then sold, delivered or otherwise furnished to any person another liquid substance or material and represented same as controlled substance, alcoholic beverage or intoxicant.**
  - e) Committed or attempted to commit robbery or extortion.**
  - f) Caused or attempted to cause damage to school property or private property, which includes but is not limited to, electronic files and databases.**
  - g) Stole or attempted to steal school property or private property, which includes but is not limited to, electronic files and databases.**
  - h) Possessed or used tobacco or products containing tobacco or nicotine products, including but not limited to cigars, cigarettes, miniature cigars, clove cigarettes, smokeless tobacco, snuff, chew packets and betel. This section does not prohibit the use of his or her own prescription products by a pupil.**
  - i) Committed an obscene act or engaged in habitual profanity or vulgarity.**
  - j) Unlawfully possessed or unlawfully offered, arranged, or negotiated to sell any drug paraphernalia, as defined in Health and Safety Code Section 11014.5.**

- k) Knowingly received stolen school property or private property, which includes but is not limited to, electronic files and databases.**
- l) Possessed an imitation firearm, i.e.: a replica of a firearm that is so substantially similar in physical properties to an existing firearm as to lead a reasonable person to conclude that the replica is a firearm.**
- m) Harassed, threatened, or intimidated a student who is a complaining witness or witness in a school disciplinary proceeding for the purpose of preventing that student from being a witness and/or retaliating against that student for being a witness.**
- n) Unlawfully offered, arranged to sell, negotiated to sell, or sold the prescription drug Soma.**
- o) Engaged in, or attempted to engage in, hazing. For the purposes of this subdivision, "hazing" means a method of initiation or preinitiation into a pupil organization or body, whether or not the organization or body is officially recognized by an educational institution, which is likely to cause serious bodily injury or personal degradation or disgrace resulting in physical or mental harm to a former, current, or prospective pupil. For purposes of this section, "hazing" does not include athletic events or school-sanctioned events.**
- p) Made terroristic threats against school officials and/or school property, which includes but is not limited to, electronic files and databases. For purposes of this section, "terroristic threat" shall include any statement, whether written or oral, by a person who willfully threatens to commit a crime which will result in death, great bodily injury to another person, or property damage in excess of one thousand dollars (\$1,000), with the specific intent that the statement is to be taken as a threat, even if there is no intent of actually carrying it out, which, on its face and under the circumstances in which it is made, is so unequivocal, unconditional, immediate, and specific as to convey to the person threatened, a gravity of purpose and an immediate prospect of execution of the threat, and thereby causes that person reasonably to be in sustained fear for his or her own safety or for his or her immediate family's safety, or for the protection of school property, which includes but is not limited to, electronic files and databases, or the personal property of the person threatened or his or her immediate family.**

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

- iv. **Causing a reasonable student to experience substantial interference with their ability to participate in or benefit from the services, activities, or privileges provided by the Charter School.**
- 2) **“Electronic Act” means the creation or transmission originated on or off the school site, by means of an electronic device, including, but not limited to, a telephone, wireless telephone, or other wireless communication device, computer, or pager, of a communication, including, but not limited to, any of the following:**
- i. **A message, text, sound, video, or image.**
  - ii. **A post on a social network Internet Web site including, but not limited to:**
    - (a) **Posting to or creating a burn page. A “burn page” means an Internet Web site created for the purpose of having one or more of the effects as listed in subparagraph (1) above.**
    - (b) **Creating a credible impersonation of another actual pupil for the purpose of having one or more of the effects listed in subparagraph (1) above. “Credible impersonation” means to knowingly and without consent impersonate a pupil for the purpose of bullying the pupil and such that another pupil would reasonably believe, or has reasonably believed, that the pupil was or is the pupil who was impersonated.**
    - (c) **Creating a false profile for the purpose of having one or more of the effects listed in subparagraph (1) above. “False profile” means a profile of a fictitious pupil or a profile using the likeness or attributes of an actual pupil other than the pupil who created the false profile.**
  - iii. **An act of cyber sexual bullying.**
    - (a) **For purposes of this policy, “cyber sexual bullying” means the dissemination of, or the solicitation or incitement to disseminate, a photograph or other visual recording by a student to another student or to school personnel by means of an electronic act that has or can be reasonably predicted to have one or more of the effects described in subparagraphs (i) to (iv), inclusive, of paragraph (1). A photograph or other visual recording, as described above, shall include the depiction of a nude, semi-nude, or sexually explicit photograph or other visual recording of a minor where the**

minor is identifiable from the photograph, visual recording, or other electronic act.

(b) For purposes of this policy, “cyber sexual bullying” does not include a depiction, portrayal, or image that has any serious literary, artistic, educational, political, or scientific value or that involves athletic events or school-sanctioned activities.

3) Notwithstanding subparagraphs (1) and (2) above, an electronic act shall not constitute pervasive conduct solely on the basis that it has been transmitted on the Internet or is currently posted on the Internet.

u) A pupil who aids or abets, as defined in Section 31 of the Penal Code, the infliction or attempted infliction of physical injury to another person may be subject to suspension, but not expulsion, except that a pupil who has been adjudged by a juvenile court to have committed, as an aider and abettor, a crime of physical violence in which the victim suffered great bodily injury or serious bodily injury shall be subject to discipline pursuant to subdivision (3)(a)-(b).

F.

v) Possessed, sold, or otherwise furnished any knife or other dangerous object of no reasonable use to the student unless, in the case of possession of any object of this type, the student had obtained written permission to possess the item from a certificated school employee, with the Executive Director or designee’s concurrence.

4. **Non-Discretionary Expellable Offenses:** Students must be recommended for expulsion for any of the following acts when it is determined pursuant to the procedures below that the pupil:

a) Possessed, sold, or otherwise furnished any firearm, explosive, or other destructive device unless, in the case of possession of any device of this type, the student had obtained written permission to possess the item from a certificated school employee, with the Executive Director or designee’s concurrence.

b) Brandished a knife at another person.

c) Unlawfully sold a controlled substance listed in Health and Safety Code Section 11053, et seq.

d) Committed or attempted to commit a sexual assault or committed a sexual battery as defined in Penal Code Sections 261, 266c, 286, 287, 288, or 289

of former Section 288a of the Penal Code or committed a sexual battery as defined in Penal Code Section 243.4.

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

The Charter School will use the following definitions:

- The term “knife” means (A) any dirk, dagger, or other weapon with a fixed, sharpened blade fitted primarily for stabbing; (B) a weapon with a blade fitted primarily for stabbing; (C) a weapon with a blade longer than 3½ inches; (D) a folding knife with a blade that locks into place; or (E) a razor with an unguarded blade.
- The term “firearm” means (A) any weapon (including a starter gun) which will or is designed to or may readily be converted to expel a projectile by the action of an explosive; (B) the frame or receiver of any such weapon; (C) any firearm muffler or firearm silencer; or (D) any destructive device. Such term does not include an antique firearm.
- The term “destructive device” means (A) any explosive, incendiary, or poison gas, including but not limited to: (i) bomb, (ii) grenade, (iii) rocket having a propellant charge of more than four ounces, (iv) missile having an explosive or incendiary charge of more than one-quarter ounce, (v) mine, or (vi) device similar to any of the devices described in the preceding clauses.

### C. Suspension Procedure

Suspensions shall be initiated according to the following procedures:

#### 1. Conference

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

The conference may be omitted if the Executive Director or designee determines that an emergency situation exists. An “emergency situation” involves a clear and present

**danger to the lives, safety or health of students or CSSD personnel. If a student is suspended without this conference, both the parent/guardian and student shall be notified of the student's right to return to school for the purpose of a conference.**

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

## **2. Notice to Parents/Guardians**

**At the time of the suspension, an administrator or designee shall make a reasonable effort to contact the parent/guardian by telephone or in person. Whenever a student is suspended, the parent/guardian shall be notified in writing of the suspension and the date of return following suspension. This notice shall state the specific offense(s) committed by the student. In addition, the notice may also state the date and time when the student may return to school. If CSSD officials wish to ask the parent/guardian to confer regarding matters pertinent to the suspension, the notice may request that the parent/guardian respond to such requests without delay.**

## **3. Suspension Time Limits/Recommendation for Expulsion**

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

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

## **4. Homework Assignments During Suspension**

**In accordance with Education Code Section 47606.2(a), upon the request of a parent, a legal guardian or other person holding the right to make education decisions for the student, or the affected student, a teacher shall provide to a student in any of grades 1 to 12, inclusive, who has been suspended from school for two (2) or more school days, the homework that the student would otherwise have been assigned.**

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

#### **D. Authority to Expel**

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

**A student may be expelled either by the neutral and impartial Charter School Board of Directors following a hearing before it or by the Board of Directors upon the recommendation of a neutral and impartial Administrative Panel, to be assigned by the Board of Directors as needed. The Administrative Panel shall consist of at least three (3) members who are certificated and neither a teacher of the pupil or a member of the Board of Directors. Each entity shall be presided over by a designated neutral hearing chairperson. The Administrative Panel may recommend expulsion of any student found to have committed an expellable offense, and the Board of Directors shall make the final determination.**

#### **E. Expulsion Procedures**

**Students recommended for expulsion are entitled to a hearing to determine whether the student should be expelled. Unless postponed for good cause, the hearing shall be held within thirty (30) school days after the Executive Director or designee determines that the pupil has committed an expellable offense and recommends the student for expulsion.**

**In the event an Administrative Panel hears the case, it will make a recommendation to the Board for a final decision whether to expel. The hearing shall be held in closed session (complying with all pupil confidentiality rules under the Family Educational Rights and Privacy Act "FERPA") unless the pupil makes a written request for a public hearing in open session three (3) days prior to the date of the scheduled hearing.**

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

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

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

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

1. The complaining witness in any sexual assault or battery case must be provided with a copy of the applicable disciplinary rules and advised of his/her right to (a) receive five days' notice of his/her scheduled testimony, (b) have up to two (2) adult support persons of his/her choosing present in the hearing at the time he/she testifies, which may include a parent, guardian, or legal counsel, and (c) elect to have the hearing closed while testifying.
2. CSSD must also provide the victim a room separate from the hearing room for the complaining witness' use prior to and during breaks in testimony.
3. At the discretion of the entity conducting the expulsion hearing, the complaining witness shall be allowed periods of relief from examination and cross-

examination during which he or she may leave the hearing room.

4. The entity conducting the expulsion hearing may also arrange the seating within the hearing room to facilitate a less intimidating environment for the complaining witness.
5. The entity conducting the expulsion hearing may also limit time for taking the testimony of the complaining witness to the hours he/she is normally in school, if there is no good cause to take the testimony during other hours.
6. Prior to a complaining witness testifying, the support persons must be admonished that the hearing is confidential. Nothing in the law precludes the entity presiding over the hearing from removing a support person whom the presiding person finds is disrupting the hearing. The entity conducting the hearing may permit any one of the support persons for the complaining witness to accompany him or her to the witness stand.
7. If one or both of the support persons is also a witness, CSSD must present evidence that the witness' presence is both desired by the witness and will be helpful to CSSD. The person presiding over the hearing shall permit the witness to stay unless it is established that there is a substantial risk that the testimony of the complaining witness would be influenced by the support person, in which case the presiding official shall admonish the support person or persons not to prompt, sway, or influence the witness in any way. Nothing shall preclude the presiding officer from exercising his or her discretion to remove a person from the hearing whom he or she believes is prompting, swaying, or influencing the witness.
8. The testimony of the support person shall be presented before the testimony of the complaining witness and the complaining witness shall be excluded from the courtroom during that testimony.
9. Especially for charges involving sexual assault or battery, if the hearing is to be conducted in public at the request of the pupil being expelled, the complaining witness shall have the right to have his/her testimony heard in a closed session when testifying at a public meeting would threaten serious psychological harm to the complaining witness and there are no alternative procedures to avoid the threatened harm. The alternative procedures may include videotaped depositions or contemporaneous examination in another place communicated to the hearing room by means of closed-circuit television.
10. Evidence of specific instances of a complaining witness' prior sexual conduct is presumed inadmissible and shall not be heard absent a determination by the entity conducting the hearing that extraordinary circumstances exist requiring

the evidence be heard. Before such a determination regarding extraordinary circumstances can be made, the witness shall be provided notice and an opportunity to present opposition to the introduction of the evidence. In the hearing on the admissibility of the evidence, the complaining witness shall be entitled to be represented by a parent, legal counsel, or other support person. Reputation or opinion evidence regarding the sexual behavior of the complaining witness is not admissible for any purpose.

#### **G. Record of Hearing**

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

#### **H. Presentation of Evidence**

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

If, due to a written request by the expelled pupil, the hearing is held at a public meeting, and the charge is committing or attempting to commit a sexual assault or committing a sexual battery as defined in Education Code Section 48900, a complaining witness shall have the right to have his or her testimony heard in a session closed to the public.

#### **I. Expulsion Decision**

The decision of the Administrative Panel shall be in the form of written findings of fact and a written recommendation to the Board who will make a final determination regarding the expulsion. The final decision by the Board shall be made within ten (10) school days following the conclusion of the hearing. The decision of the Board is final.

If the Administrative Panel decides not to recommend expulsion, or the Board of Directors ultimately decides not to expel, the student shall immediately be returned to his/her educational program.

The Board of Directors may also determine to suspend the enforcement of the expulsion order for a period of not more than one (1) calendar year from the date of the expulsion hearing and return the student to the student's previous educational program under a probationary status and rehabilitation plan to be determined by the Board. During the period of the suspension of the expulsion order, the student is deemed to be on probationary status. The Board of Directors may revoke the suspension of an expulsion order under this section if the student commits any of the enumerated offenses listed above or violates any of the Charter School's rules and regulations governing student conduct. If the Board revokes the suspension of an expulsion order, the student may be expelled under the terms of the original expulsion order. The Board of Directors shall apply the criteria for suspending the enforcement of the expulsion order equally to all students, including individuals with exceptional needs as defined in Education Code Section 56026. The Board of Directors shall further comply with the provisions set forth under Education Code Section 48917, except as otherwise expressly set forth herein.

#### **J. Written Notice to Expel**

The Executive Director or designee, following a decision of the Board to expel shall send written notice of the decision to expel, including the Board's adopted findings of fact, to the student or parent/guardian. This notice shall also include the following: a) Notice of the specific offense committed by the student; and b) Notice of the student's or parent/guardian's obligation to inform any new district in which the student seeks to enroll of the student's status with CSSD.

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

#### **K. Disciplinary Records**

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

#### **L. No Right to Appeal**

The pupil shall have no right of appeal from expulsion from CSSD as the Board of Directors' decision to expel shall be final.

#### **M. Expelled Pupils/Alternative Education**

Parents/guardians of pupils who are expelled shall be responsible for seeking alternative education programs including, but not limited to, programs within the County or their school district of residence. CSSD shall work cooperatively with parents/guardians as

requested by parents/guardians or by the school district of residence to assist with locating alternative placements during expulsion.

#### **N. Rehabilitation Plans**

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

#### **O. Readmission or Admission of Previously Expelled Student**

The decision to readmit a pupil after the end of the student's expulsion term or to admit a previously expelled pupil from another school district or CSSD who has not been readmitted/admitted to another school or school district after the end of the student's expulsion term, shall be in the sole discretion of the Board following a meeting with the Executive Director or designee and the pupil and parent/guardian or representative to determine whether the pupil has successfully completed the rehabilitation plan and to determine whether the pupil poses a threat to others or will be disruptive to the school environment. The Executive Director or designee shall make a recommendation to the Board of Directors following the meeting regarding the Executive Director's or designee's determination. The Board shall then make a final decision regarding readmission or admission of the student during the closed session of a public meeting, reporting out any action taken during closed session consistent with the requirements of the Brown Act. The pupil's readmission is also contingent upon CSSD's capacity at the time the student seeks readmission or admission to the Charter School.

#### **P. Notice to Teachers**

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

#### **R. Special Procedures for the Consideration of Suspension and Expulsion or Involuntary Removal of Students with Disabilities**

##### **1. Notification of SELPA**

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

##### **2. Services During Suspension**

Students suspended for more than ten (10) school days in a school year shall continue to receive services so as to enable the student to continue to participate

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

### **3. Procedural Safeguards/Manifestation Determination**

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

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

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

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

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

If CSSD, the parent/guardian, and relevant members of the IEP/504 team determine that the behavior was not a manifestation of the student's disability and that the conduct in question was not a direct result of the failure to implement the IEP/504 Plan, then CSSD may apply the relevant disciplinary procedures to

children with disabilities in the same manner and for the same duration as the procedures would be applied to students without disabilities.

#### **4. Due Process Appeals**

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

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

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

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

#### **5. Special Circumstances**

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

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

- a. Carries or possesses a weapon, as defined in 18 USC 930, to or at school, on school premises, or to or at a school function;
- b. Knowingly possesses or uses illegal drugs, or sells or solicits the sale of a controlled substance, while at school, on school premises, or at a school function; or

- c. Has inflicted serious bodily injury, as defined by 20 USC 1415(k)(7)(D), upon a person while at school, on school premises, or at a school function.

#### **6. Interim Alternative Educational Setting**

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

#### **7. Procedures for Students Not Yet Eligible for Special Education Services**

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

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

- a. The parent/guardian has expressed concern in writing, or orally if the parent/guardian does not know how to write or has a disability that prevents a written statement, to CSSD supervisory or administrative personnel, or to one of the child's teachers, that the student is in need of special education or related services.
- b. The parent/guardian has requested an evaluation of the child.
- c. The child's teacher, or other CSSD personnel, has expressed specific concerns about a pattern of behavior demonstrated by the child, directly to the director of special education or to other CSSD supervisory personnel.

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

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

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

## **Disaster-Related Administrative and Emergency Procedures**

*Following is a list of the Administrative and Emergency Procedures that have bearing on conducting effective emergency or disaster responses. Complete copies of the Administrative and Emergency Procedures are maintained on the website.*

### **Administrative Procedures**

**Crisis Response Team**

**RC Safety**

### **Emergency Procedures**

**Homeland Security Threat Levels**

**Fire**

**Environmental Emergencies**

**Shelter-in-Place**

**Earthquake**

**Weapons**

**Injury/Illness/Accidental Death**

**Disturbances and Demonstrations**

**Lockdown**

**Threats and Violence**

**Bombs and Explosions**

**Shootings**

**Terrorism**

**Communications**

**Emergency Plans & Drills**

**Evacuation and Reunification**

**Biological Emergency**

**Flooding**

**Utility Emergency**

## **EMERGENCY RESPONSE: ALLERGIC REACTION**

There are many types of medical conditions that may trigger an allergic reaction, among them anaphylactic shock, diabetes and sickle cell anemia. Possible symptoms of an allergic reaction include skin irritation or itching, rash, hives, nasal itching or sneezing, localized swelling, swollen tongue, restlessness, sweating, fright, shock, shortness of breath, vomiting, cough and hoarseness. School nurses have a specialized health care plan for certain conditions and should be contacted for any sign of allergic reaction.

### **STAFF ACTIONS:**

- If imminent risk, call 911.
- Send for immediate help (First Aid, CPR, medical) and medication kit (for known allergies).
- Notify the Administrator of Instructional Services.
- Assist in getting "Epi" (Epinephrine) pen for individuals who carry them (usually in backpack), and prescription medications (kept by school nurse).
- If an insect sting, remove stinger immediately.
- Assess situation and help student/staff member to be comfortable.
- Move student or adult only for safety reasons.

### **ADMINISTRATOR OF INSTRUCTIONAL SERVICES/SAFETY AMBASSADOR ACTIONS:**

- If imminent risk, call 911 (always call 911 if using "Epi" pen).
- Notify nurse/parent or guardian.
- Administer medication, by order of a doctor, if appropriate; apply ice pack to affected area, keep victim warm or take other actions as indicated.
- Observe for respiratory difficulty.
- Attach a label to the person's clothing indicating: time & location of insect sting or food ingested, name of medicine, dosage and time administered.

### **OTHER PREVENTATIVE/SUPPORTIVE ACTIONS:**

- Keep an "Epi" pen in the school office and notify staff as to location.
- Emergency health card should be completed by parents for each child and should be easily accessible by school personnel.

## EMERGENCY RESPONSE: BIOLOGICAL AGENT RELEASE

This is an incident involving the discharge of a biological substance in a solid, liquid or gaseous state. Such incidents may include the release of radioactive materials. A biological agent can be introduced through:

- postal mail, via a contaminated letter or package
- a building's ventilation system
- a small explosive device to help it become airborne
- a contaminated item such as a backpack, book bag, or other parcel left unattended
- the food supply
- aerosol release (for example, with a crop duster or spray equipment)

Defense against biological release (e.g. anthrax, smallpox, plague, ricin etc.) is difficult because usually appear after some time has lapsed. Indicators that may suggest the release of a biological or chemical substance include multiple victims suffering from: watery eyes, choking or breathing difficulty, twitching or the loss of coordination. Another indicator is the presence of distressed animals or dead birds. Determine which scenario applies and implement the appropriate response procedures.

### Outside the Resource Center

#### Staff Actions:

- Notify Administrator of Instructional Services.
- Move students away from immediate vicinity of danger (if outside, implement Take Cover).
- Segregate individuals who have been topically contaminated by a liquid from unaffected individuals. Send affected individuals to a designated area medical attention.
- Follow standard student assembly, accounting and reporting procedures.

#### Administrator of Instructional Services/Safety Ambassador Actions:

- Initiate SHELTER IN PLACE.
- Shut off HVAC units.
- Move to central location where windows and doors can be sealed with duct tape.
- Call 911. Provide location and nature of the emergency and school actions taken.
- Notify Director of Operations and Technology of the situation.
- Turn on a battery-powered commercial radio and listen for instructions.
- Remain inside the resource center until the Department of Health or Fire Department determines it is safe to leave.

- Arrange for psychological counseling for students and staff.

### Inside the Resource Center

#### **Staff Actions:**

- Notify Administrator of Instructional Services or Safety Ambassador.
- Segregate individuals who have been topically contaminated by a liquid from unaffected individuals.
- Implement EVACUATION or EMERGENCY MEETING AREA EVACUATION, as appropriate. Send affected individuals to a designated area for medical attention.
- Follow standard student assembly, accounting and reporting procedures.
- Prepare a list of those who are in the affected area to provide to emergency response personnel.

#### **Administrator of Instructional Services/Safety Ambassador Actions:**

- Initiate EVACUATION of the resource center or EMERGENCY MEETING AREA EVACUATION to move students away from immediate vicinity of danger.
- Move up-wind from the potential danger.
- Call 911. Provide exact location and nature of emergency.
- Designate security team to isolate and restrict access to potentially contaminated areas.
- Wait for instructions from emergency responders-- Health or Fire Department.
- Notify Director of Operations and Technology of the situation.
- Arrange for immediate psychological counseling for students and staff.
- Wait to return to the resource center until it has been declared safe by local HazMat or appropriate agency.

#### **Those Who Have Direct Contact With Biological Agent:**

- Wash affected areas with soap and water.
- Immediately remove and contain contaminated clothing
- Do not use bleach on potentially exposed skins.
- Remain in safe, but separate area, isolated from those who are unaffected, until emergency response personnel arrive.

## EMERGENCY RESPONSE: BOMB THREAT

In the event that the school receives a bomb threat by telephone, follow the Bomb Threat Checklist on the next page to document information about the threat. Keep the caller on the telephone as long as possible and listen carefully to all information the caller provides. Make a note of any voice characteristics, accents, or background noises and complete the Bomb Threat Report as soon as possible.

<p><b>Telephone Bomb Threats</b></p> <ul style="list-style-type: none"> <li>▪ Remain calm/courteous.</li> <li>▪ Read phone's visual display.</li> <li>▪ Listen, don't interrupt.</li> <li>▪ Keep caller talking. Pretend hearing difficulty.</li> <li>▪ Notice details: background noises, voice description.</li> <li>▪ Ask: When? Where? What? How?</li> <li>▪ Don't touch any suspicious objects.</li> </ul> <p style="text-align: center;"><b>Call 911</b></p>
--

### Person Receiving Threat By Telephone:

- Listen. Do not interrupt caller.
- Keep the caller on the line with statements such as *"I am sorry, I did not understand you. What did you say?"*
- Alert someone else by prearranged signal to notify the telephone company to trace the call while the caller is on the line.
- Notify Safety Ambassador immediately after completing the call.
- Complete the Bomb Threat Checklist.

### Person Receiving Threat By Mail:

- Note the manner in which the threat was delivered, where it was found and who found it.
- Limit handling of item by immediately placing it in an envelope so that fingerprints may be detected. Written threats should be turned over to law enforcement.
- Caution students against picking up or touching any strange objects or packages.
- Notify Administrator of Instructional Services or Safety Ambassador.

### Administrator of Instructional Services/Safety Ambassador Actions:

- Call 911.
- If the caller is still on the phone, contact the phone company to trace the call. Tell the telephone operator the name of school, name of caller, phone

number on which the bomb threat came in. This must be done quickly since the call cannot be traced once the caller has hung up.

- ☑ Instruct staff and students to turn off any pagers, cellular phones or two-way radios. Do not use those devices during this threat since explosive devices can be triggered by radio frequencies.
- ☑ Determine whether to evacuate the threatened resource center and adjoining buildings. If the suspected bomb is in a corridor, modify evacuation routes to bypass the corridor.
- ☑ Use the intercom, personal notification by designated persons, or the PA system to evacuate the threatened rooms.
- ☑ If it is necessary to evacuate the entire school, use the fire alarm.
- ☑ Notify the Director of Operations and Technology of the situation.
- ☑ Direct a search team to look for suspicious packages, boxes or foreign objects.
- ☑ Do not return to the resource center until it has been inspected and determined safe by proper authorities.
- ☑ Avoid publicizing the threat any more than necessary.

#### **Search Team Actions:**

- ☑ Use a systematic, rapid and thorough approach to search the resource center and surrounding areas.
- ☑ Check the resource center and work areas, public areas (foyers, offices, bathrooms and stairwells), unlocked closets, exterior areas (shrubbery, trash cans, debris boxes) and power sources (computer rooms, gas valves, electric panels, telephone panels).
- ☑ If suspicious item is found, make no attempt to investigate or examine object.

#### **Staff Actions:**

- ☑ Evacuate students as quickly as possible, using primary or alternate routes.
- ☑ Upon arrival at the designated safe emergency meeting area, take attendance. Notify the Administrator of Instructional Services/Safety Ambassador of any missing students.
- ☑ Do not return to the resource center until emergency response officials determine it is safe.

## BOMB THREAT PROCEDURES

*This quick reference checklist is designed to help employees and decision makers of commercial facilities, schools, etc. respond to a bomb threat in an orderly and controlled manner with the first responders and other stakeholders.*

Most bomb threats are received by phone. Bomb threats are serious until proven otherwise. Act quickly, but remain calm and obtain information with the checklist on the reverse of this card.

If a bomb threat is received by phone:

1. Remain calm. Keep the caller on the line for as long as possible. DO NOT HANG UP, even if the caller does.
2. Listen carefully. Be polite and show interest.
3. Try to keep the caller talking to learn more information.
4. If possible, write a note to a colleague to call the authorities or, as soon as the caller hangs up, immediately notify them yourself.
5. If your phone has a display, copy the number and/or letters on the window display.
6. Complete the Bomb Threat Checklist immediately. Write down as much detail as you can remember. Try to get exact words.
7. Immediately upon termination of call, DO NOT HANG UP, but from a different phone, contact authorities immediately with information and await instructions.

If a bomb threat is received by handwritten note:

- Call \_\_\_\_\_
- Handle note as minimally as possible

If a bomb threat is received by e-mail:

- Call \_\_\_\_\_
- Do not delete the message.

Signs of a suspicious package:

- No return address
- Excessive postage
- Stains
- Strange odor
- Strange sounds
- Unexpected delivery
- Poorly handwritten
- Misspelled words
- Incorrect titles
- Foreign postage
- Restrictive notes

• Refer to your local bomb threat emergency response plan for evaluation criteria

**DO NOT:**

- Use two-way radios or cellular phone. Radio signals have the potential to detonate a bomb.
- Touch or move a suspicious package.

### WHO TO CONTACT (Select One)

- 911
- Follow your local guidelines

For more information about this form contact the Office for Bombing Prevention at: [OBP@dca.dhs.gov](mailto:OBP@dca.dhs.gov)



## BOMB THREAT CHECKLIST

DATE: \_\_\_\_\_ TIME: \_\_\_\_\_

TIME CALLER HUNG UP: \_\_\_\_\_ PHONE NUMBER WHERE CALLED: \_\_\_\_\_

### Ask Caller:

- Where is the bomb located? (building, floor, room, etc.) \_\_\_\_\_
- When will it go off? \_\_\_\_\_
- What does it look like? \_\_\_\_\_
- What kind of bomb is it? \_\_\_\_\_
- What will make it explode? \_\_\_\_\_
- Did you place the bomb? Yes No
- Why? \_\_\_\_\_
- What is your name? \_\_\_\_\_

### Exact Words of Threat:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### Information About Caller:

- Where is the caller located? (background/level of noise) \_\_\_\_\_
- Estimated age: \_\_\_\_\_
- Is voice familiar? If so, who does it sound like? \_\_\_\_\_
- Other points: \_\_\_\_\_

Caller's Voice	Background Sounds	Threat Language
<input type="checkbox"/> Female	<input type="checkbox"/> Animal noises	<input type="checkbox"/> Incoherent
<input type="checkbox"/> Male	<input type="checkbox"/> House noises	<input type="checkbox"/> Message read
<input type="checkbox"/> Accent	<input type="checkbox"/> Kitchen noises	<input type="checkbox"/> Taped message
<input type="checkbox"/> Angry	<input type="checkbox"/> Street noises	<input type="checkbox"/> Irrational
<input type="checkbox"/> Calm	<input type="checkbox"/> Booth	<input type="checkbox"/> Preface
<input type="checkbox"/> Clearing throat	<input type="checkbox"/> PA system	<input type="checkbox"/> Well-spoken
<input type="checkbox"/> Coughing	<input type="checkbox"/> Conversation	
<input type="checkbox"/> Cracking Voice	<input type="checkbox"/> Music	
<input type="checkbox"/> Crying	<input type="checkbox"/> Motor	
<input type="checkbox"/> Deep	<input type="checkbox"/> Chair	
<input type="checkbox"/> Deep breaths	<input type="checkbox"/> Stalk	
<input type="checkbox"/> Disoriented	<input type="checkbox"/> Office machinery	
<input type="checkbox"/> Distinct	<input type="checkbox"/> Factory machinery	
<input type="checkbox"/> Excited	<input type="checkbox"/> Local	
<input type="checkbox"/> Laughter	<input type="checkbox"/> Long distance	
<input type="checkbox"/> Upp		
<input type="checkbox"/> Loud	<b>Other Information:</b>	
<input type="checkbox"/> Nasal	_____	
<input type="checkbox"/> Normal	_____	
<input type="checkbox"/> Ragged	_____	
<input type="checkbox"/> Rapid	_____	
<input type="checkbox"/> Raspy	_____	
<input type="checkbox"/> Slow	_____	
<input type="checkbox"/> Slurred	_____	
<input type="checkbox"/> Soft	_____	
<input type="checkbox"/> Stutter	_____	

## EMERGENCY RESPONSE: FLOOD

Flooding could threaten the safety of students and staff whenever storm water or other sources of water threaten to inundate the resource center. Flooding may occur if a water pipe breaks or prolonged rainfall causes urban streams to rise. Flooding may also occur as a result of damage to water distribution systems such as failure of a dam or levee. If weather-related, an alert message will be broadcast over the weather radio station.

### Administrator of Instructional Services/Safety Ambassador Actions:

- Issue **STAND BY** instruction. Determine if evacuation is required.
- Notify local police department of intent to **EVACUATE**, the location of the emergency meeting area and the route to be taken to that location.
- Delegate a search team to assure that all students have been evacuated.
- Post a notice on the resource center door stating where the school has relocated and inform the District Office.
- q Monitor local AM radio weather station for flood information.
- q Notify the Director of Operations and Technology of school status and action taken.
- q Do not allow staff and students to return to the resource center until proper authorities have determined that it is safe to do so.

### Staff Actions:

- If warranted, **EVACUATE** students using the evacuation plan. Take the attendance roster, emergency backpack and student comfort kits. Check attendance before leaving the resource center.
- Remain with students throughout the evacuation process.
- Upon arrival at the emergency meeting area, take attendance. Report any missing students to Administrator of Instructional Services/Safety Ambassador and emergency response personnel.
- Do not return to the resource center until it has been inspected and determined safe by property authorities.

## **EMERGENCY RESPONSE: GAS ODOR / LEAK**

**All school personnel and custodians, shall immediately report any gas odor or suspected gas leak to the Director of Operations and Technology. If an odor is detected outside the resource center, it may not be necessary to evacuate.**

### **Staff Actions:**

- Notify Administrator of Instructional Services.**
- Move students from immediate vicinity of danger.**
- Do not turn on any electrical devices such as lights, computers, fans, etc.**
- If odor is severe, leave the area immediately.**
- If the resource center is evacuated, take student attendance and report any missing students to Administrator of Instructional Services/Safety Ambassador.**

### **Administrator of Instructional Services/Safety Ambassador Actions:**

- If gas leak is internal, evacuate the resource center immediately.**
- Call 911.**
- Notify utility company.**
- Determine whether to move to alternate location.**
- If extended stay outdoors in inclement weather, contact the Director of Operations and Technology.**
- Do not return to the resource center until it has been inspected and determined safe by proper authorities.**

## **EMERGENCY RESPONSE: HAZARDOUS MATERIALS**

The nature of the material and the proximity of the incident to the resource center will determine which emergency ACTION should be implemented. Police, Fire or Public Health Department may order EVACUATION of the school. See also BIOLOGICAL AGENT RELEASE and CHEMICAL ACCIDENT.

### **Administrator of Instructional Services/Safety Ambassador Actions:**

- Call 911, if necessary.
- If there is a threat of airborne toxicity, shut-off ventilation system in affected area.
- Initiate EVACUATION. Any toxic cloud that can affect students in their resource centers would very likely affect them outside the resource centers as well. If evacuating by foot, move crosswind to avoid fumes, never upwind or downwind.
- Isolate anyone suspected of being contaminated with a substance that could be transferred to others until public safety personnel carry out decontamination procedures.
- If time is available, initiate Emergency Meeting Area Evacuation. Move students and staff away from the path of the hazardous materials.
- Notify Director of Operations and Technology.
- Wait for instructions from emergency responders-- Health or Fire Department.
- Do not allow the return of students to the resource centers or buildings until public safety officials declare the area safe.
- Upon return to school, ensure that all resource centers are adequately aired.

### **Teacher Actions:**

- Follow standard student assembly, accounting and reporting procedures.
- Report names of missing students to office.
- Do not take unsafe actions such as returning to the resource center before it has been declared safe.

## EMERGENCY RESPONSE: HOSTAGE SITUATION

Hostage situations may unfold rapidly in a variety of ways. Events may range from a single perpetrator with a single hostage to several perpetrators with many hostages. Specific actions by school staff will be limited pending arrival of law enforcement officers. It is their responsibility to bring the situation to a successful conclusion. When as much of the school has been evacuated as can be accomplished, school staff should focus on providing support as needed to the police department, communicating with parents, and providing counseling for students.

### Administrator of Instructional Services/Safety Ambassador Actions

- Call 911. Provide all known essential details of the situation:**
- Number of hostage takers and description**
- Type of weapons being used**
- Number and names of hostages**
- Any demands or instructions the hostage taker has given**
- Description of the area**
  - **Identify an assembly area for responding officers away from the hostage situation. Have school liaison wait at assembly area for police to arrive.**
  - **Protect resource center occupants before help arrives by initiating a LOCKDOWN or EVACUATION (or combination of both).**
  - **Secure exterior doors from outside access.**
  - **When police arrive, assist them in a quiet, orderly evacuation away from the hostage situation.**
  - **Gather information on students and/or staff involved and provide the information to the police. If the parent of a student is involved, gather information about the child.**
  - **Identify media staging area, if appropriate. Implement a hotline for parents.**
  - **Account for students as they are evacuated.**
  - **Provide recovery counseling for students and staff.**

### Staff Actions:

- If possible, assist in evacuating students to a safe area away from the danger. Protect students by implementing a LOCKDOWN.**
- Alert the Administrator of Instructional Services/Safety Ambassador.**
- Account for all students.**

## EMERGENCY RESPONSE: INTRUDER

All public schools are required to post signs at points of entry to their resource centers. The following statement should be used on signage:

*All visitors entering school grounds on school days between 7:30 a.m. and 4:30 p.m. must register at the front desk. Failure to do so may constitute a misdemeanor.*

*-- California Penal Code Title 15, Chapter 1.1 § 627.2*

To prevent intruders on resource centers, keep doors secure, use sign-in sheets for visitors and cameras and staff to monitor entryways.

### Administrator of Instructional Services/Safety Ambassador Actions:

- Initiate LOCKDOWN.
- Request intruder to leave the resource center. Remain calm. Be courteous and confident. Keep distance from the intruder. Speak in soft, non-threatening manner. Avoid hostile-type actions, except in cases when necessary to safeguard person or property. Listen to the intruder. Give him or her an opportunity to vent. Attempt to be helpful. When talking to the intruder, use phrases such as:
  - *"What can we do to make this better?"*
  - *"I understand the problem, and I am concerned."*
  - *"We need to work together on this problem."*
- As soon as the conversation or actions of the individual become threatening or violent, call 911 immediately. Provide description and location of intruder.
- Keep subject in view until police or law enforcement arrives.
- Take measures to keep subject away from students and the resource center.
- Designate an administrator or staff member to coordinate with public safety at their command post; provide a resource center map/exit plan and keys to public safety personnel.
- When scheduling a meeting with an individual known to be aggressive, arrange for another staff member or student resource officer to be present.
- Be available to deal with the media and bystanders and keep the resource center clear of visitors.

### Staff Actions:

- Notify the Administrator of Instructional Services/Safety Ambassador. Provide description and location of the intruder. Visually inspect the intruder for indications of a weapon.
- Keep intruder in view until police or law enforcement arrives. Stay calm. Do not indicate any threat to the intruder.

- Isolate intruder from students. Lock the resource center and office doors. Close blinds and stay clear of windows and panes of glass. Remain inside rooms until the ALL CLEAR instruction is announced.**

## EMERGENCY RESPONSE: UTILITY FAILURE

Failure of any of the utilities (electricity, gas, water) during school hours constitutes a condition that must be dealt with on a situational basis. Advance notice may be received from a utility company regarding loss of service. In many cases, such loss of service will be of short duration and require no special action other than notifying staff of the temporary interruption of service.

### Administrator of Instructional Services/Safety Ambassador:

- Notify utility company. Provide the following information:
- Determine length of time service will be interrupted.
- Determine desired action, which may include relocation of students and staff, notification of parents, and alternate food service.
- If disruption in service will severely hamper school operation, notify students and staff by appropriate means.
- Use messengers with oral or written word as an alternate means of faculty notification.
- Notify District Office of loss of service.
- Implement plan to provide services without utilities or with alternate utilities.

#### A. Plan for Loss of Water

Toilets: \_\_\_\_\_

Drinking Water: \_\_\_\_\_

Food Service: \_\_\_\_\_

Fire Suppression: \_\_\_\_\_

Other: \_\_\_\_\_

#### B. Plan for Loss of Electricity

Ventilation: \_\_\_\_\_

Emergency Light: \_\_\_\_\_

Computers: \_\_\_\_\_

Other: \_\_\_\_\_

#### C. Plan for Loss of Natural Gas

Heat: \_\_\_\_\_

Food Service: \_\_\_\_\_

Other: \_\_\_\_\_

## EMERGENCY RESPONSE: THREATS / ASSAULTS

Threats occur when a belligerent or armed person on the resource centers bullies, intimidates or coerces others, targeting an individual, particular group or the entire school community. Threats are presented as overt hostility. They may be received by written note, email communication, phone call or orally. The procedure below applies to an oral threat.

### ADMINISTRATOR OF INSTRUCTIONAL SERVICES/SAFETY AMBASSADOR ACTIONS:

- Assess the type of threat to determine the level of risk to the safety of students and staff. In categorizing the risk, attempt to determine:
  - 1) Is the individual moving towards violent action?
  - 2) Is there evidence to suggest movement from thought to action?
    - High violence potential qualifies for arrest or hospitalization.
    - Safety is endangered when there is: (a) sufficient evidence of repetitive/ intentional infliction of emotional distress upon others; or (b) sufficient evidence of the unintentional infliction of emotional distress upon others.
- Notify police (dial 911), if the safety of students or staff is endangered. Provide exact location and nature of incident and school response actions.
- Isolate the threatening person from other students and staff, if it is safe to do so. Initiate appropriate response actions, which may be LOCKDOWN or EVACUATION. Cancel all outside activities.
- Respond to students who are prone to overt displays of anger in a calm, non-confrontational manner. If an immediate threat is not clearly evident, attempt to diffuse the situation.
- If an individual is armed with any type of weapon, USE EXTREME CAUTION. Do not attempt to remove the weapon from the possession of the individual. Allow police to do so.
- Facilitate a meeting with student(s) and family to review expectations.
- Facilitate a staff meeting to review plans for keeping school safe. Enlist the support of community service providers.

### Staff Actions:

- If any students are outside, move them inside the resource center or away from the location of the threat/assault. If unable to do so, have students lie down and cover their heads. Keep students calm.
- Inside the resource center, institute LOCKDOWN. Close all curtains and blinds.
- Disconnect the school television system in resource centers so the individual cannot view news coverage and see locations of police/students/etc.

- Remain with students until ALL CLEAR is given.**

## **EMERGENCY RESPONSE: IRRATIONAL BEHAVIOR**

**A risk to the life and safety of students and staff may exist there is a serious display of disordered thought or behavior. Possible symptoms include: hallucinations, extreme paranoia, impaired judgment that may lead to unsafe decision-making and dangerous behavior (to self or others), incoherent or disjointed speech and self-injurious behavior such as: hitting head, cutting self. Attempts should be made to use de-escalation strategies, calming techniques (e.g., deep breathing), and to implement behavior plans, crisis plans or strategies in IEP, if in place.**

### **Administrator of Instructional Services/Safety Ambassador Actions:**

- Keep the individual under continuous adult supervision.**
- Keep the individual in the resource center until parent/guardian has been notified.**
- Arrange appropriate support services for necessary care of individual.**
- If the individual actively displays dangerous behavior or there is reason to believe the student cannot be safely transported, call agencies as appropriate to coordinate emergency mental health services (e.g., mental health facilities, juvenile court, law enforcement).**
- School professional (psychologist, counselor, social worker, nurse) should recommend next steps to the Administrator of Instructional Services. The next steps may include:**
  - **Provide parents/guardian with the names and phone numbers of mental health resources**
  - **Recommend that the parents make an immediate contact with a therapist.**
  - **Request that parents/guardian to sign release forms to allow two-way communication between the school and the treating agency.**
- Make a follow-up check with the treating agency, family and student as appropriate, to ensure that appropriate care has been arranged.**
- Provide follow-up collaborative support for the student and parents (as indicated) within the school**
- Develop a safety plan prior to the student's return to school.**
- Document actions taken on behalf of the student (referrals, phone contacts, follow-up activities, etc.)**

### **Staff Actions:**

- Take immediate action to isolate the individual and provide safety to the student body. Do not leave the irrational individual alone.**
- Notify Administrator of Instructional Services/Safety Ambassador.**
- Notify school nurse, school psychologist, counselor or social worker.**
- Protect individual from injury.**

## **EMERGENCY RESPONSE: EXPLOSION**

Emergency response will depend on the type of explosion (smoke bomb, chemical lab incident, etc.) and proximity to the school. All students should be kept away from the explosion and under supervision.

### **Administrator of Instructional Services/Safety Ambassador:**

- Determine whether emergency meeting area evacuation should be implemented. If so, sound fire alarm. This will automatically implement action to EVACUATE the resource center. EVACUATION may be warranted in some resource centers but others may be used for SHELTER IN PLACE.
- Notify Fire Department (call 911). Provide school name, address, exact location within the building, your name and phone number and nature of the emergency.
- Secure area to prevent unauthorized access until the Fire Department arrives.
- Advise the Director of Operations and Technology of school status.
- Notify emergency response personnel of any missing students.
- Notify utility company of breaks or suspected breaks in utility lines or pipes. Provide school name, address, location within building, your name and phone.
- Direct a systematic, rapid and thorough approach to search the building and surrounding areas. Check resource centers and work areas, public areas (foyers, offices, bathrooms and stairwells), unlocked closets, exterior areas (shrubbery, trash cans, debris boxes) and power sources (computer rooms, gas valves, electric panels, telephone panels).
- Determine if Student Release should be implemented. If so, notify staff, students and parents.
- If damage requires the school to be closed, notify parents and staff of school status and alternate location for resource center instruction. Do not return to the resource center until it has been inspected and determined safe by proper authorities.

### **Staff Actions:**

- Initiate DROP, COVER AND HOLD ON.
- If explosion occurred inside the resource center, EVACUATE to outdoor assembly area. Keep students and staff at a safe distance from the resource center and away from fire-fighting equipment.
- Check to be sure all students have left the resource center. Remain with students throughout evacuation process.
- Upon arrival at assembly area, check attendance. Report status to Safety Ambassador immediately.
- Render first aid as necessary.

- ☑ **Do not return to the resource center until the emergency response personnel determine it is safe to do so.**
- ☑ **If explosion occurred in the surrounding area, initiate SHELTER IN PLACE. Keep students at a safe distance from site of the explosion.**

## EMERGENCY RESPONSE – PANDEMIC INFLUENZA

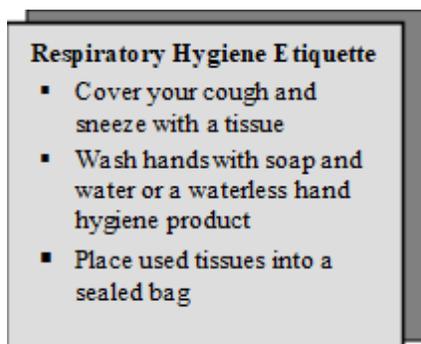
Influenza is a highly contagious viral disease. Pandemic influenza differs from both seasonal influenza (flu) and avian influenza in the following aspects:

- It is a rare global outbreak which can affect populations around the world.
- It is caused by a new influenza virus to which people do not have immunity.
- Depending upon the specific virus, it can cause more severe illness than regular flu and can affect young healthy people more so than older, sick people.

The Department of Health and Human Services will take the lead in mobilizing a local response to pandemic influenza. Public health alerts will be reported to schools and the community. Individual schools may be closed temporarily to contain spread of the virus.

### Principal/Site Administrator Actions:

- ☑ Activate heightened surveillance of illness within school location. Gather data on symptoms of students and staff who are sick at home.
- ☑ Insure that students and staff members who are ill stay home.
- ☑ Send sick students and staff home from school immediately.
- ☑ Provide fact sheets and guidelines for school families to make them aware of symptoms and remind them of respiratory hygiene etiquette
- ☑ Monitor bulletins and alerts from the Department of Health and Human Services.
- ☑ Keep staff informed of developing issues.
- ☑ Assist the Department of Health and Human Services in monitoring outbreaks.
- ☑ Respond to media inquiries regarding school attendance status.
- ☑ Implement online education, if necessary, so that students can stay home.
- ☑ Maintain surveillance after the initial epidemic in the event a second wave passes through the community.



### Staff and Student Actions:

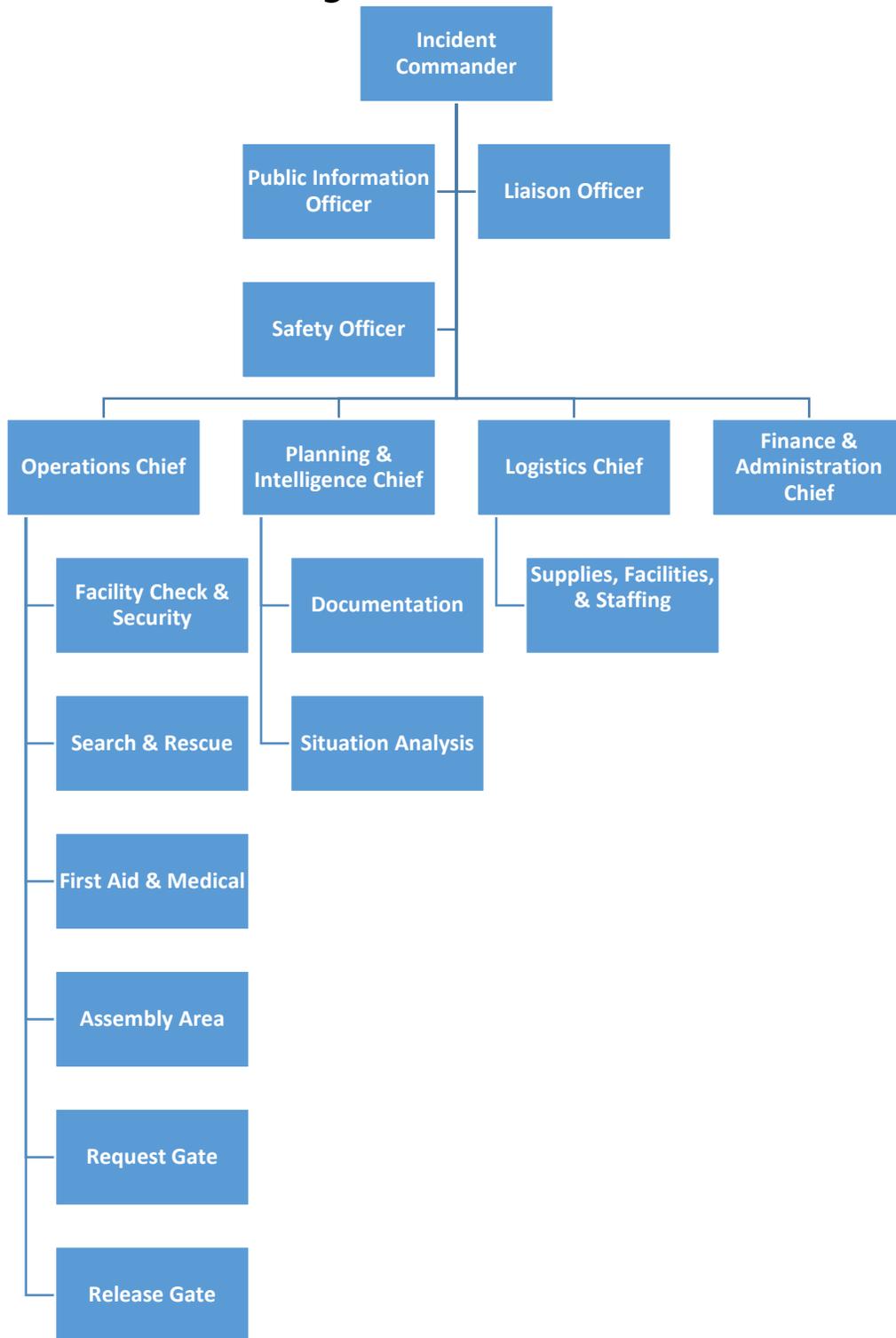
- Stay home when ill with cough or other flu-like symptoms (chills, fever, muscle aches, sore throat).**
- Practice “respiratory hygiene etiquette”.**
- Disinfect surfaces contaminated with infected respiratory secretions with a diluted bleach solution (1 part bleach to 100 parts water).**
- Implement online homework assignments so that students can stay home.**

# **SECTION FOUR**

## **Emergency Plan Roles & Responsibilities**

# INCIDENT COMMAND TEAM

## Organizational Chart



## INCIDENT COMMAND TEAM ASSIGNMENTS

*(This assignment list identifies the names of individuals assigned to positions)*

Primary	Position	Alternate
Mary Bixby	Incident Commander	Tim Tuter
Tim Tuter	Safety Officer	Angela Neri
Bradi Zapata	Public Information Officer (PIO)	Eleanor Pe
Eleanor Pe	Liaison Officer	Bradi Zapata
Tim Tuter	Operations Chief	Angela, Neri, Eleanor Pe
Angela Neri	Facility Check/Security	V. Vallon, H. Beaupre, D. Hurd, Ana Maria Rojas
RC Safety Lead by Location	Search & Rescue Team Leader	V. Vallon, H. Beaupre, D. Hurd, Ana Maria Rojas
Eleanor Pe	First Aid & Medical Team Leader	Designated per location
Administrator of Instructional Services	Assembly Area	J. Garrity, H. Beaupre
Safety Ambassadors (per location)	Request Gate	V. Vallon, H. Beaupre, D. Hurd, Ana Maria Rojas
Safety Ambassadors (per location)	Release Gate	V. Vallon, H. Beaupre, D. Hurd, Ana Maria Rojas
Tim Tuter	Planning Chief / Logistics Chief	Angela Neri, Eleanor Pe
Angela Neri	Documentation	Aida Garcia
Tim Tuter	Situation Analysis	Angela Neri, Eleanor Pe
Angela Neri	Supplies/Facilities/Staffing	Aida Garcia
Lynne Alipio	Finance & Administration Chief	Mary Bixby

## **Position Activation Information**

### **Equipment**

Every position on the Incident Command Team will require the following equipment:

1. Identification vest
2. Two-way RC radio
3. Paper and pens/pencils
4. Job description clipboard

### **Position-Specific Equipment**

Certain positions require special equipment or forms. Such specific needs are identified on the individual position checklists.

### **Position Activation**

1. Once notified of your assignment, put on your vest.
2. Check in with the Incident Commander at the Incident Command Post for a situation briefing.
3. Check in with your Chief for details and updates associated with your position.
4. Obtain necessary equipment and supplies.
5. Open and maintain a Position Log. Maintain all required records and documentation to support the history of the emergency or disaster.

#### **Document:**

- a. Messages received
- b. Actions taken
- c. Decision justifications and documentation
- d. Requests filled
- e. Document missing staff

### **Position Deactivation**

1. At the direction of the Incident Commander, deactivate your position and close out all logs. Provide logs, timekeeping records, and other relevant documents to the Documentation Unit.
2. Return equipment and reusable supplies to Logistics.

## Section: Command

### Position: Incident Commander

**Primary:** Mary Searcy Bixby

**Alternate:** Tim Tuter

**Reports to:** Superintendent (or designee)

**Staffing Characteristics:** Principal or Administrator

**Responsibility:** The Incident Commander is solely responsible for emergency and disaster operations and shall remain at the Command Post to observe and direct all operations. Ensures the safety of students, staff and others in the RC.

**Lead by example: your behavior sets tone for staff and students.**

#### Special Equipment:

- Crisis Response Boxes
- Emergency Disaster Kit
- RC map
- Master keys
- Position-Specific forms
- AM/FM radio (battery)
- Command Post Tray (pens, etc.)
- Emergency Plan
- Tables & chairs (if Command Post is outdoors)
- Job Description Clipboards
- Bull horn
- Staff rosters (2 sets)
- Emergency radio
- Copies of Forms

#### Start-Up:

- Assess type and scope of emergency.
- Determine threat to human life and structures.
- Implement Emergency Plan and School Emergency Procedures.
- Develop and communicate an Incident Action Plan with objectives and a time frame to meet those objectives.
- Activate functions (assign positions) as needed.

- Fill in Incident Command Team Assignment Form as positions are staffed.**
- Appoint a backup or alternate Incident Commander in preparation for long-term operations.**

#### **During Event:**

- Continue to monitor and assess total RC situation:**
- View RC map periodically for Search & Rescue progress and damage assessment information.**
- Check with chiefs for periodic updates.**
- Reassign personnel as needed.**
- Report through Communications to corporate office on status of staff, RC as needed. (RC Status Report)**
- Develop and communicate revised incident action plans as needed.**
- Authorize release of information.**
- Utilize your back up; plan and take regular breaks, 5-10 minutes each hour, relocate away from the CP.**
- Plan regular breaks for all staff and volunteers. Take care of your caregivers!**
- Release staff as appropriate per school guidelines. By law, during a disaster, the staff will become "Disaster Service Workers."**
- Remain on and in charge of your RC until redirected or released by the Office of the President.**

#### **After:**

- Authorize deactivation of sections or units when they are no longer required.**
- At the direction of the Office of the President, deactivate the entire emergency response. If the Fire Department or other outside agency calls an "All Clear," contact the corporate office before taking any further action.**
- Ensure that any open actions not yet completed will be taken care of after deactivation.**
- Ensure the return of all equipment and reusable supplies to Logistics.**
- Close out all logs. Ensure that all logs, timekeeping records, reports, and other relevant documents are completed and provided to the Documentation Unit.**
- Proclaim termination of the emergency and proceed with recovery operations if necessary.**

## **Section: Command**

### **Position: Safety Officer**

**Primary:** Tim Tuter

**Alternate:** Angela Neri

**Reports To:** Incident Commander

#### **Staffing**

**Characteristics:** It is common for the Incident Commander to carry out these duties. A separate position checklist is here in the event the Incident Commander needs to assign the duties to another individual.

**Responsibility:** The Safety Officer ensures that all activities are conducted in as safe a manner as possible under the circumstances which exist.

#### **Special Equipment:**

Hard hat (if available)

#### **During Event:**

- Monitor drills, exercises, and emergency response activities for safety.
- Identify and mitigate safety hazards and situations.
- Stop or modify all unsafe operations.
- Ensure that responders use appropriate safety equipment.
- Think ahead and anticipate situations and problems before they occur.
- Anticipate situation changes, such as severe aftershocks, in all planning.
- Keep the Incident Commander advised of your status and activity and on any problem areas that now need or will require solutions.

## Section: Command

### Position: Public Information Officer

**Primary:** Bradi Zapata

**Alternate:** Eleanor Pe

**Reports To:** Incident Commander

#### Staffing

**Characteristics:** It is common for the Incident Commander or the School's Communications Office to carry out these duties. A separate position checklist is here in the event the Incident Commander needs to assign the duties to another individual.

**Responsibility:** Staff, students, parents and the public have the right and need to know important information related to emergencies/disaster at the RC *as soon as it is available*.

The Public Information Officer acts as the official spokesperson for the RC in an emergency situation. If the School's Communications Officer is available, he/she will be the official spokesperson. An RC-based Public Information Officer should only be used if the media is in the RC and the School's Communications Officer is not available or forthcoming.

#### Special Equipment:

- Battery operated AM/FM radio
- Marking pens
- Scotch tape/masking tape
- Forms:
  - Public Information Release Worksheet
  - School Accountability Report Card
- Scissors
- RC map(s) and area map(s):
  - 8-1/2 x 11 handouts
  - Laminated display
- Tape recorder and tapes

**Start-Up Activities:**

- Determine a possible “news center” location as a media reception area (located away from the Command Post and students). Get approval from the Incident Commander.
- Identify yourself as the “Public Information Officer” (vest, visor, sign, etc.)
- Consult with School’s Communications Officer to coordinate information release.
- Assess situation and obtain statement from the Incident Commander. Tape-record, if possible.
- Advise arriving media that the RC is preparing a press release and approximate time of its issue.
- Open and maintain a position log of your actions and all communications. If possible, tape media briefings. Keep all documentation to support the history of the event.

**During Event:**

- Keep up-to-date on the situation.
- Statements must be approved by the Incident Commander and should reflect:
  - Reassurance — EGBOK — “Everything’s Going to Be OK.”
  - Incident or disaster cause and time of origin.
  - Size and scope of the incident.
  - Current situation — condition of RC, evacuation progress, care being given, injuries, student release location, etc. Do not release any names.
  - Resources in use.
  - Best routes to RC if known and appropriate.
  - Any information school wishes to be released to the public.
  - Read statements if possible.
- When answering questions, be complete and truthful, always considering confidentiality & emotional impact. Avoid speculation, bluffing, lying, talking “off the record,” arguing, etc. Avoid use of the phrase “no comment.”
- Remind RC staff volunteers to refer *all* questions from media or waiting parents to the PIO.
- Update information periodically with Incident Commander.
- Ensure announcements and other information is translated into other languages as needed.
- Monitor news broadcasts about incident. Correct any misinformation heard.

## **Section: Command**

### **Position: Liaison Officer**

**Primary:** Eleanor Pe

**Alternate:** Bradi Zapata

**Reports to:** Incident Commander

#### **Staffing**

**Characteristics:** It is common for the Incident Commander to carry out these duties. A separate position checklist is here in the event the Incident Commander needs to assign the duties to another individual.

**Responsibility:** The Liaison Officer serves as the point-of-contact for Agency Representatives from assisting organizations and agencies outside the School and assists in coordinating the efforts of these outside agencies by ensuring the proper flow of information.

#### **During Event:**

- Brief Agency Representatives on current situation, priorities and incident action plan.
- Ensure coordination of efforts by keeping Incident Commander informed of agencies' action plans.
- Provide periodic update briefings to Agency Representatives, as necessary.

## **Section: Operations**

### **Position: Operations Chief**

**Primary:** Tim Tuter

**Alternate:** Angela Neri, Eleanor Pe

**Reports to:** Incident Commander

#### **Staffing**

**Characteristics:** The Operations Chief should be a staff member familiar with the RC and be trained in response skills.

**Responsibility:** The Operations Chief manages the direct response to the disaster, which can include RC Facility Check & Security Unit, Search & Rescue Unit, and First Aid & Medical Unit.

#### **Special Equipment:**

- Search & Rescue equipment
- Maps: See Crisis Response Box

#### **During Event:**

- Assume the duties of all operations positions until staff is available and assigned.
- As staff is assigned, brief them on the situation and supervise their activities, utilizing the position checklists.
- If additional supplies or staff is needed for the Operations Section, notify Logistics. When additional staff arrives, brief them on the situation, and assign them as needed.
- Coordinate Search & Rescue operations. Appoint Search & Rescue Team Leader to direct their operations, if necessary.
- As information is received from operations staff, pass it on to Situation Analysis and/or the Incident Commander.
- Inform the Incident Commander regarding tasks and priorities.
- Make sure that Operations staff is following standard procedures, utilizing appropriate safety gear, and documenting their activities.
- Schedule breaks and reassign Operations staff within the section as needed.

## Section: Operations

### Position: Facility Check & Security

**Primary:** Angela Neri

**Alternate:** Learning Leads/Administrator of Instructional Services (David Hurd, Ana Maria Rojas, Jay Garrity, Hayley Beaupre, Vanessa Vallon)

**Reports to:** Operations Chief

#### Staffing

**Characteristics:** Building Safety Supervisor or others familiar with the RC's facilities.

**Responsibility:** Controls utilities, restricts access to unsafe areas and communicates damage to the Incident Commander. Also assists with traffic control for public safety vehicles, parent pick-up and the media.

#### Special Equipment:

- Hard hat
- Work gloves
- Whistle
- Master keys
- Bucket or duffel bag with goggles
- Flashlight
- Dust masks
- Yellow caution tape
- Shutoff tools — for gas & water (crescent wrench)

#### Start Up Activities:

- Check condition and take along appropriate tools.

#### During Event:

- As you do the following, observe the RC and report any damage by radio to the Command Post\*
- Lock or open gates and major external doors appropriate for the situation.
- Locate/control/extinguish small fires as necessary.
- Check gas meter and, *if gas is leaking*, shut down gas supply.

- Shut down electricity only if building has clear structural damage or advised to do so by Command Post.**
- Post yellow caution tape around damaged or hazardous areas.**
- Verify that RC is “locked down” and report same to Incident Command Post.**
- Advise Incident Command Post of all actions taken for information and proper logging.**
- Be sure that the entire RC has been checked for safety hazards and damage.**
- No damage should be repaired prior to full documentation, such as photographs and video evidence, unless the repairs are essential to immediate life-safety.**
- Direct traffic of vehicles of parents, public safety, and media on and outside the RC as appropriate.**

## Section: Operations

### Position: Search & Rescue Team Leader

**Primary:** School Designated Safety Leads\*

**Alternate:** Learning Leads/Administrator of Instructional Services (David Hurd, Ana Maria Rojas, Vanessa Vallon, Jay Garrity, Hayley Beaupre)

**Reports to:** Operations Chief

#### Staffing

**Characteristics:** Trained in Search & Rescue

**Responsibility:** Check the RC for damage, rescues victims, establishes and directs Search & Rescue Teams as needed, reports RC situation to the Operations Chief.

#### Special Equipment:

- Search & Rescue Team Member Backpack

#### Start-Up Activities:

- You must be wearing sturdy shoes and long sleeves.
- Put batteries in flashlight.
- First to arrive assumes role of Team Leader and obtains a briefing from the Operations Chief, noting known fires, injuries, or other situations requiring response.
- Teams should be assigned based on available manpower, minimum 2 persons per team. The recommendation is for the following standards for establishing Search & Rescue Teams: Elementary School and Administrative Facilities with <500 = 2 Teams; Middle Schools and Administrative Facilities with 500-1000 = 4 Teams; and Senior High School and Administrative Facilities with >1000 = 6 Teams

#### During Event:

- Buddy system: Minimum of 2 persons per team.
  - Take no action that might endanger you. Do not work beyond your expertise. Use appropriate safety gear. Size up the situation first.
  - Follow all operational and safety procedures.

- Report gas leaks, fires, or structural damage to Command Post immediately upon discovery. Shut off gas or extinguish fires, if possible.**
- Before entering a building, inspect complete exterior of building. Report structural damage to team leader. Use yellow caution tape to barricade hazardous areas. Do not enter severely damaged buildings.**
- If building is safe to enter, search assigned area (following map) using orderly pattern. Check all rooms. Use chalk or grease pencil to mark slash on door when entering room. Check under desks and tables. Search visually and vocally. Listen. When leaving each room, close slash to form "X" on door. Report by radio to Command Post that room has been cleared (ex: "Room A-123 is clear")\***
- When injured victim is located, team transmits location, number, and condition of injured to Command Post. Do not use names of students or staff. Follow directions from Command Post.**
- Record exact location of damage and triage tally (I=immediate, D=delayed, DEAD=dead) Report information.**
- Keep radio communication brief and simple. No codes.**

## Section: Operations

### Position: Search & Rescue Team

**Primary:** School Designated Safety Leads\*

**Alternate:** Learning Leads/Administrator of Instructional Services (David Hurd, Ana Maria Rojas, Vanessa Vallon, Jay Garrity, Hayley Beaupre)

**Reports to:** Search & Rescue Team Leader

#### Staffing

**Characteristics:** Trained in Search & Rescue

**Responsibility:** Check the RC for damage, rescues victims, reports RC situation to the Search & Rescue Team Leader.

#### Special Equipment:

- Search & Rescue Team Member Backpack

#### Start-Up Activities:

- You must be wearing sturdy shoes and long sleeves.
- Put batteries in flashlight.
- First to arrive assumes role of Team Leader and obtains a briefing from the Operations Chief, noting known fires, injuries, or other situations requiring response.
- Teams should be assigned based on available manpower, minimum 2 persons per team. The recommendation is for the following standards for establishing Search & Rescue Teams: Elementary School and Administrative Facilities with <500 = 2 Teams; Middle Schools and Administrative Facilities with 500-1000 = 4 Teams; and Senior High School and Administrative Facilities with >1000 = 6 Teams

#### During Event:

- Buddy system: Minimum of 2 persons per team.
  - Take no action that might endanger you. Do not work beyond your expertise. Use appropriate safety gear. Size up the situation first.
  - Follow all operational and safety procedures.
- Report gas leaks, fires, or structural damage to Command Post immediately upon discovery. Shut off gas or extinguish fires, if possible.

- Before entering a building, inspect complete exterior of building. Report structural damage to team leader. Use yellow caution tape to barricade hazardous areas. Do not enter severely damaged buildings.**
- If building is safe to enter, search assigned area (following map) using orderly pattern. Check all rooms. Use chalk or grease pencil to mark slash**
- on door when entering room. Check under desks and tables. Search visually and vocally. Listen. When leaving each room, close slash to form "X" on door. Report by radio to Command Post that room has been cleared (ex: "Room A-123 is clear")\***
- When injured victim is located, team transmits location, number, and condition of injured to Command Post. Do not use names of students or staff. Follow directions from Command Post.**
- Record exact location of damage and triage tally (I=immediate, D=delayed, DEAD=dead) Report information.**
- Keep radio communication brief and simple. No codes.**

## Section: Operations

### Position: First Aid & Medical Team Leader

**Primary:** Eleanor Pe – School Nurse

**Alternate:** School Counselors

**Reports to:** Operations Chief

#### Staffing

**Characteristics:** Trained as a leader in providing emergency medical and psychological aid (i.e. School Nurse).

**Responsibility:** Leader to team providing emergency medical response, first aid, and psychological, or CISM counseling.

#### Special Equipment:

- Marking pens
- First Aid Supplies: Stretchers, Blankets, Vests (if available), Quick reference medical guides
- Tables & chairs
- Ground cover/tarps
- Forms: Notice of First Aid Care Given Form
- Medical Treatment Victim Log
- Morgue supplies:
  - Tags
  - Vicks Vapor Rub
  - Pens/Pencils
  - Plastic tarps
  - Plastic trash bags
  - Stapler
  - Duct tape
  - 2" cloth tape

#### Start-Up Activities:

- The recommendation is for the following number of medical teams with each team consisting of two members: Elementary School and Administrative Facilities with <500 = 2 Teams; Middle Schools and Administrative Facilities with 500-1000 = 4 Teams; Senior High School and Administrative Facilities with >1000 = 6 Teams

- Establish scope of disaster with the Incident Commander and determine probability of outside emergency medical support and transport needs.
- Request assistance from the School Crisis Response Team for psychological staff and student needs
- Make personnel assignments. If possible, assign a minimum of two people to Triage, two to Immediate, two to Delayed, and two to Psychological.
- Set up First Aid & Medical Treatment Area in a safe place, away from students and parents, with access to emergency vehicles. Obtain equipment/supplies from the container.
- Assess available inventory of supplies & equipment.
- Review safety procedures and assignments with personnel.
- Establish point of entry (“triage”) into treatment area.
- Establish “immediate” and “delayed” treatment areas.
- Set up a separate Psychological First Aid area with staff trained in CISM from the School Crisis Response Team.
- Establish the need for a temporary morgue. If a morgue is needed, establish an appropriate location in consideration of the following:
  - If directed, set up morgue area. Verify:
    - Tile, concrete, or other cool floor surface
    - Accessible to Coroner’s vehicle
    - Remote from assembly area
    - Security: keep unauthorized persons out of morgue.
    - Maintain respectful attitude.

#### During Event:

- Oversee care, treatment, and assessment of patients
- Ensure caregiver and rescuer safety
  - Latex gloves for protection from body fluids; replace with new gloves for each new patient.
- Make sure that accurate records are kept.
- Provide personnel response for injuries in remote locations or request Logistics for staffing assistance.
- If needed, request additional personnel from Logistics.
- Brief newly assigned personnel.
- Report deaths immediately to Operations Chief.
  - After pronouncement or determination of death:
  - *Do not* move the body until directed by Command Post.
  - *Do not* remove any personal effects from the body. Personal effects must remain with the body *at all times*.

- **As soon as possible, *notify Operations Chief*, who will notify the Command Post, who will attempt to notify law enforcement authorities of the location and, if known, the identity of the body. The law enforcement authorities will notify the Coroner.**
  - **Keep accurate records and make available to law enforcement and/or the Coroner when requested.**
  - **Write the following information on two tags:**
    - **Date and time found.**
    - **Exact location where found.**
    - **Name of decedent, if known.**
    - **If identified—how, when, by whom.**
    - **Name of person filling out tag.**
    - **Attach one tag to body.**
    - **If the Coroner's Office will not be able to pick up the body soon, place body in plastic bag(s) and tape securely to prevent unwrapping. Securely attach the second tag to the outside of the bag. Move body to morgue.**
  - Place any additional personal belongings found in a separate container and label as above. Do not attach to the body—store separately near the body.**
  - Keep Operations Chief informed of overall status.**
  - Set up morgue, if necessary, in cool, isolated, secure area; follow guidelines.**
  - Stay alert for communicable diseases and isolate appropriately.**
- After:**
- Conduct a Critical Incident Stress Debriefing for staff.**

## Section: Operations

### Position: First Aid & Medical Team

**Primary:** Eleanor Pe – School Nurse

**Alternate:** Designated Per Location

**Reports to:** First Aid & Medical Team Leader

#### Staffing

**Characteristics:** Trained in first aid and CISM

**Responsibility:** Works with a buddy to administer first-aid and arrange for transport of victims as necessary.

#### Special Equipment:

- First-aid supplies
- Marking pens
- Stretchers, blankets, vests (if available)
- Quick reference medical guides
- Tables, chairs, ground cover/tarps, medication from health office
- Forms: Notice of First Aid Care Given Form, First Aid & Medical Treatment Victim Log

#### Start-Up Activities:

- Obtain & wear personal safety equipment including latex gloves.
- Use approved safety equipment and techniques.
- Check with First Aid & Medical Team Leader for assignment.

#### During Event:

- Administer appropriate first aid.
- Keep accurate records of care given.
- Continue to assess victims at regular intervals.
- Report deaths immediately to First Aid & Medical Team Leader.
- If & when transport is available, do final assessment and document on triage tag. Keep and file records for reference—do not send with victim.
- Student's Emergency Card must accompany student removed from RC to receive advanced medical attention. Send emergency out-of-area phone number if available.

#### Triage Entry Area:

- Staffed with minimum of 2 trained team members, if possible.
- One member confirms triage tag category (red, yellow, green) and directs to proper treatment area. Should take 30 seconds to assess — no treatment takes place here. Assess, if not tagged.
- Second team member logs victims' names on form and sends forms to Incident Command Post as completed.

**Treatment Areas (“Immediate” & “Delayed”):**

- Staff with minimum of 2 team members per area, if possible.
- One member completes secondary head-to-toe assessment.
- Second member records information on triage tag and RC treatment records.
- Follow categories: Immediate, Delayed, Dead
- When using 2-way radio, do not use names of injured or dead.

**After:**

- Clean up First Aid & Medical Treatment Area. Dispose of hazardous waste safely.
- Assist in the Critical Incident Stress Debriefing for the staff

## Section: Operations

### Position: Assembly Area

**Primary:** Administrator of Instructional Services

**Alternate:** Learning Leads (Ana Maria Rojas, David Hurd, Vanessa Vallon)

**Reports to:** Operations Chief

#### Staffing

**Characteristic:** Trained in managing large groups of students

**Responsibility:** Ensure the care and safety of all students in RC (except those who are in the First Aid & Medical Treatment Area).

#### Special Equipment:

- Ground cover and tarps
- First aid kit, water, food, sanitation supplies
- Student activities: books, games, coloring books, etc.
- Forms:
  - Student Accounting Form
  - Notice of First Aid Care Given Form

#### Start-Up Activities:

- Request additional personnel, if needed.
- If RC is evacuating:
  - Verify that the assembly area and routes to it are safe.
  - Count or observe the RC as they exit, to make sure that all evacuates.
  - Initiate the set-up of portable toilet facilities and hand-washing stations.

#### During Event:

- Monitor the safety and well-being of the students and staff in the Assembly Area.
- Administer minor first aid as needed.
- Support the Release Gate Unit process by releasing students with appropriate paperwork.
- When necessary, provide water and food to students and staff.
- Make arrangements for portable toilets if necessary, ensuring that students and staff wash their hands thoroughly to prevent disease.
- Make arrangements to provide shelter for students and staff.

- Arrange activities and keep students reassured.**
- Update records of the number of students and staff in the assembly area (or in the buildings).**
- Direct all requests for information to the Public Information Officer.**

## **Section: Operations**

### **Position: Request Gate**

**Primary:** Safety Ambassadors (Per Location)

**Alternate:** Learning Leads/Administrator of Instructional Services (David Hurd, Ana Maria Rojas, Vanessa Vallon, Jay Garrity, Hayley Beaupre)

**Reports to:** Operations Chief

#### **Staffing**

**Characteristics:** RC staff or volunteers

**Responsibility:** Assure proper processing of reunification requests at the Request Gate. Also, process requests from volunteers.

#### **Special Equipment:**

- Stapler
- Box(es) of Emergency Cards
- Signs: Parent Request Gate
- Empty file boxes to use as out boxes
- Forms:
  - Student Release Form
  - Volunteer Assignment List

#### **Start-Up Activities:**

- Secure area against unauthorized access. Mark gate with sign.
- Set up Request Gate at the main student access gate. Use alphabetical grouping signs to organize parent requests.
- Have Student Release Forms available for parents or guardians outside of fence at Request Gate. Assign volunteers to assist.
- Ensure an adequate distance between the Request Gate and the Release Gate.

#### **During Event:**

- Follow procedures outlined below to ensure the safe reunification of students with their parents or guardians.
- Refer all requests for information to the Public Information Officer. Do not spread rumors!
- If volunteers arrive to help, send those with Disaster Volunteer badges with photo ID to the Supply, Facilities, and Staffing Unit.

If they are not registered (do not have badges), register them at the Request Gate.

#### Reunification Procedures:

- Requesting parent or guardian fills out Student Release Form, gives it to staff member, and shows identification.
- Staff verifies identification, pulls Emergency Card from file, and verifies that the requester is listed on the card.
- Staff instructs the requester to proceed to the Release Gate.
- If there are two copies of the Emergency Cards (one at each gate), staff files the Emergency Card in the out box. If there is only one copy, runner takes the card with the Student Release Form, and staff files a blank card with the student's name on it in the out box.
- Runner takes form(s) to the designated RC.

**Note:** If a parent or guardian refuses to wait in line, don't argue. Note time with appropriate comments on Emergency Card and place in out box.

#### If student is in:

- Runner shows Student Release Form to the teacher
- Teacher marks box, "*Sent with Runner.*"
- If appropriate, teacher sends parent copy of Notice of First Aid Care Given Form with the runner.
- Runner walks student(s) to Release Gate.
- Runner hands paperwork to staff at Release Gate.

#### If student is not in:

- Teacher makes appropriate notation on Student Release Form:
- "*Absent*" if student was never in the RC that day.
- "*First Aid*" if student is in First Aid & Medical Treatment Area.
- "*Missing*" if student was in the RC but now cannot be located.
- Runner takes Student Release Form to the Command Post.
- Command Post verifies student location if known and directs runner accordingly.
- If runner is retrieving multiple students and one or more are missing, walk available students to Release Gate before returning "*Missing*" forms to the Command Post for verification.

## Section: Operations

### Position: Release Gate

**Primary:** Designated Per Location

**Alternate:** Learning Leads/Administrator of Instructional Services (David Hurd, Ana Maria Rojas, Vanessa Vallon, Jay Garrity, Hayley Beaupre)

**Reports to:** Operations Chief

#### Staffing

**Characteristics:** RC staff or volunteers

**Responsibility:** Assure proper reunification of student with parent or guardian at the Release Gate.

#### Special Equipment:

- Stapler
- Signs: Parent Release Gate
- Empty file boxes to use for processed Student Release Forms

#### Start-Up Activities:

- Secure area against unauthorized access. Mark gate with sign.
- Set up Release Gate away from the Request Gate.
- Assign volunteers to assist, as needed.

#### During Event:

- Follow procedures outlined below to ensure the safe reunification of students with their parents or guardians.
- Refer all requests for information to the Public Information Officer. Do not spread rumors!

#### If student is in:

- Runner shows Student Release Form to the teacher
- Teacher marks box, "*Sent with Runner.*"
- If appropriate, teacher sends parent copy of Notice of First Aid Care Given Form with the runner.
- Runner walks student(s) to Release Gate.
- Runner hands paperwork to staff at Release Gate.
- Release staff match student to requester, verify proof of identification, ask requester to fill out and sign the lower

portion of Student Release Form, and release student. Parents are given the Notice of First Aid Care Given Form, if applicable.

**If student is not in:**

- Teacher makes appropriate notation on Student Release Form:
- "Absent"* if student was never in the RC that day.
- "First Aid"* if student is in First Aid & Medical Treatment Area.
- "Missing"* if student was in the RC but now cannot be located.
- Runner takes Student Release Form to Incident Command Post.
- Incident Command Post verifies student location if known and directs runner accordingly.
- If runner is retrieving multiple students and one or more are missing, walk available students to Release Gate before returning *"Missing"* forms to Incident Command Post for verification.
- Parent should be notified of missing student status and escorted to crisis counselor.
- If student is in first aid, parent should be escorted to First Aid & Medical Treatment Area.
- If student was marked absent, parent will be notified by staff member.

## **Section: Planning & Intelligence**

### **Position: Planning & Intelligence Chief/Logistic Chief**

**Primary:** Tim Tuter, Angela Neri

**Alternate:** Eleanor Pe

**Reports to:** Incident Commander

#### **Staffing**

**Characteristics:** Vice Principal or someone familiar with RC and its occupants

**Responsibility:** Collection, evaluation, documentation, and use of information about the incident.

#### **Equipment:**

- File box(es)
- Dry-erase pens and eraser
- Large map of RC, laminated or covered with Plexiglas
- Forms:
  - Position Log

#### **During:**

- Assume the duties of all Planning Section positions until staff is available and assigned.
- As (or if) staff is assigned, brief them on the situation and supervise their activities, utilizing the position checklists.
- Assist the Incident Commander in writing Incident Action Plan.

## Section: Planning & Intelligence

### Position: Documentation

**Primary:** Angela Neri

**Alternate:** Aida Garcia

**Reports to:** Planning Chief

#### Staffing

**Characteristics:** It is common for the Planning & Intelligence Chief to carry out these duties. A separate position checklist is here in the event the Planning & Intelligence Chief needs to assign the duties to another individual.

**Responsibility:** Collection, evaluation, documentation and status of all documents associated with the emergency response, including financial expenditures, timekeeping, and other necessary documentation.

#### Special Equipment:

- File box(es)
- Forms:
  - Position Log

#### During:

##### Records:

- Maintain time log of the Incident, noting all actions and reports.
- Record content of all radio communication with School Emergency Operations Center (EOC).
- Record verbal communication for basic content.
- Log in all written reports.
  - *Important:* A permanent log may be typed or rewritten at a later time for clarity and better understanding. Keep all original notes and records—they are legal documents.
- File all reports for reference.

##### Student and Staff Accounting:

- Receive, record, and analyze Student Accounting Forms.
- Check off staff roster. Compute number of students, staff, and others in the RC for Situation Analysis. Update periodically.
- Report missing persons and RC damage to Incident Command Post.
- Report first aid needs to First Aid & Medical Team Leader.

- File forms for reference.**
- Track regular and overtime of all staff.**

**After:**

- Collect and file all paperwork and documentation from deactivating sections.**
- Securely package and store these documents for future use.**

## Section: Planning & Intelligence

### Position: Situation Analysis

**Primary:** Tim Tuter, Angela Neri

**Alternate:** Eleanor Pe

**Reports to:** Planning Chief

#### Staffing

**Characteristics:** It is common for the Planning & Intelligence Chief to carry out these duties. A separate position checklist is here in the event the Planning & Intelligence Chief needs to assign the duties to another individual.

**Responsibility:** Analyzes the range of events impacting the RC to provide the Incident Commander and the rest of the Incident Command Team with cumulative information about the incident.

#### Special Equipment:

- Dry-erase pens and eraser
- Large map of RC, laminated or covered with plexiglas
- File box(es)
- Map of local area

#### During:

##### Situation Status Map:

- Collect, organize and analyze situation information.
- Mark RC map appropriately as related reports are received. This includes but is not limited to Search & Rescue reports and damage updates, giving a concise picture status of RC.
- Preserve map as legal document until photographed.
- Use area-wide map to record information on major incidents, road closures, utility outages, etc. (This information may be useful to staff for planning routes home, etc.)

##### Situation Analysis:

- Provide current situation assessments based on analysis of information received.
- Develop situation reports for the Incident Command Post to support the action planning process.

- Think ahead and anticipate situations and problems before they occur.**
- Report only to Incident Command Post personnel. Refer all other requests to Public Information Officer.**

## **Section: Logistics**

### **Position: Logistics Chief**

**Primary:** Tim Tuter, Angela Neri

**Alternate:** Eleanor Pe

**Reports to:** Incident Commander

**Staffing Characteristics:** Administrative skills

**Responsibility:** The Logistics Section is responsible for providing facilities, services, personnel, equipment, and materials in support of the incident.

**Special Equipment:**

- Cargo container or other storage facility with all emergency supplies stored in the RC.
- Forms:
  - RC Status Report
  - Volunteer Assignment List

**Start-Up Activities:**

- Assume the duties of all Logistics positions until staff is available and assigned.
- Ensure that the Incident Command Post and other facilities are setup as needed.

**During Event:**

- Coordinate supplies, equipment, and personnel needs with the Incident Commander.
- Maintain security of cargo container, supplies and equipment.

**After:**

- Secure all equipment and supplies.

## **Section: Logistics**

### **Position: Supplies, Facilities, & Staffing**

**Primary:** Angela Neri

**Alternate:** Aida Garcia

**Reports to:** Logistics Chief

#### **Staffing**

**Characteristics:** It is common for the Logistics Chief to carry out these duties. A separate position checklist is here in the event the Logistics Chief needs to assign the duties to another individual.

**Responsibility:** Provides facilities, equipment, supplies, materials, and staffing in support of the incident.

#### **Special Equipment:**

- Cargo container or other storage facility and all emergency supplies stored in the RC

#### **Start-Up Activities:**

- Open supplies container or other storage facility if necessary.
- Begin distribution of supplies and equipment as needed.
- Set up the Incident Command Post (including Crisis Response Boxes and Emergency Disaster Kit)
- Review staff roster and begin call-back, as required.

#### **During Event:**

- Maintain security of cargo container, supplies and equipment.
- Distribute supplies and equipment as needed.
- Assist team members in locating appropriate supplies and equipment.
- Set up Staging Area, Sanitation Area, Feeding Area, First Aid & Medical Treatment Area, and other facilities as needed.
- Coordinate with the Incident Commander on establishing the need for future work shifts and related staffing needs.

#### **After:**

- Secure all equipment and supplies.

## **Section: Finance & Administration**

### **Position: Finance & Administration Chief**

**Primary:** Lynne Alipio

**Alternate:** Mary Bixby

**Reports to:** Incident Commander

#### **Staffing**

**Characteristics:** Familiar with common financial record keeping standards – School Receptionist.

**Responsibility:** Purchasing of all necessary materials, tracking financial records, maintain timekeeping records, student accountability during emergencies, and recovering school records following an emergency.

#### **Special Equipment:**

None

#### **During:**

- As (or if) staff is assigned, brief them on the situation and supervise their activities, utilizing the position checklists.
- Work closely with Planning & Intelligence Section and Logistics Section on purchasing any necessary supplies, equipment, and materials.
- Track financial records. Maintains accurate and complete records of purchases. Most purchases will be made at the School level; however, in emergency situations, it may be necessary for RCs to acquire certain items quickly.
- Manage and analyze timekeeping records for emergency responders
- Determine process for tracking regular and overtime of staff.
- Ensure that accurate records are kept of all staff members, indicating hours worked.
- If School personnel not normally assigned to the RC are working, be sure that records of their hours are kept.
- Determine process for tracking purchases.

- Track student accountability records during emergencies. Missing and extra students should be reported to allow for accurate accounting of students.**
- Support Logistics in making any purchases which have been approved by the Incident Commander.**

**After:**

- Responsible for managing the recovery of school records and applying for reimbursement following an emergency. Work with Documentation Unit to gather all pertinent documents and records.**

**RC/Facility Planning Teams  
Safety Ambassadors\*  
2021-2022**

The designated Ambassadors are responsible for planning and implementation at the Resource Center (RC). Resource Center Representatives will meet with their colleagues to discuss all aspects of a safe and supportive learning environment, safety and trainings which will include:

**Safe and Supportive Learning Environment:**

- ✓ Number of students in RC – adhere to student scheduled hours
- ✓ Schedule CTR works hours – ensure there are two staff members when opening and closing the RC
- ✓ Share information at RC meetings - Discuss safety at monthly resource center meetings
- ✓ Meet with new resource center staff within 30 days
- ✓ Reach out to the Juvenile Community Officer, Community Resources and Community Sub Police Stations
- ✓ Keep technology locked and secured

**Instructional Support:**

- ✓ Consistent RC rules among all staff – hats, phones, language use
- ✓ Ensure middle school students work together
- ✓ Instructional tables labeled by subject area
- ✓ Know your student needs – triggers
- ✓ Measuring threat levels
- ✓ CTR supporting the learning environment

**Compliance:**

- ✓ Safety Drills are mandated to be performed three (3) times per year
- ✓ Ensure safety supplies are located in designated area and replenished each time a drill is performed
- ✓ Confirm that the Emergency Radio works properly (Channel 1)
- ✓ Update Resource Center Emergency Exit Plan annually
- ✓ Review and sign off on monthly Fire Extinguisher, Epi-Pen and Eye Wash Stations

### Audeo Charter School

<b>Resource Center</b>	<b>Safety Ambassador</b>
Kearny Mesa	Courtney McManus
K5 Home School	Tiffany Hart
La Jolla	Eden Borsack
Mission Valley-East	Brittany Yourex
Mission Valley-West	Jennifer Nieves/Rosan Duenas
Pacific Beach	Chad Menestrina

### The Charter School of San Diego

<b>Resource Center</b>	<b>Safety Ambassador</b>
Clairemont	Wendy Rode
College Avenue	Jeanette Perez
Downtown	Shoshana Good
Euclid	Eddie Beltran
Lake Murray	Christine Daniels
Mira Mesa	Amber Stewart
North Park	Jeanette Brown
Northgate	Bridget Snyder
Old Town	Esli Algandar/Alaura Dorociak
Paradise Hills Annex	Constance Bautista
Paradise Hills Cadet	Dan Leavell/Michael Fagan
Petco Park	Laura Liedblad
Point Loma	Denise Piatchuk
Scripps Ranch	Ryan Low
Sorrento Mesa	1 <sup>st</sup> Floor – Rose Mooney/ Natasha Dunnells 2 <sup>nd</sup> Floor – Tiffany Yandell/Aida Garcia
Tierrasanta	Roman Rubio
Woodman	Michelle Ramirez

*Updated January 2022*

## STUDENT SUCCESS PROGRAMS

### INDEPENDENT STUDY POLICY

#### Board Policy #3200

Approved: September 13, 2000

*amended May 9, 2001, February 13, 2002, February 20, 2003, February 21, 2008, September 9, 2009, February 8, 2012, June 29, 2015, **June 21, 2018, June 23, 2021, July 29, 2021, February 16, 2022***

The Board of Directors of Student Success Programs, Inc. hereby adopts this Independent Study Policy to apply to Audeo Charter School and The Charter School of San Diego, all hereafter collectively referred to as “Charter School.” SSP shall offer independent study to meet the educational needs of pupils enrolled in the Charter School. Independent study is an optional educational alternative in which no pupil may be required to participate and is designed to teach knowledge and skills of the core curriculum. The Charter School shall provide appropriate existing services and resources to enable pupils to complete their independent study successfully. The following written policies have been adopted by the Charter School Board of Directors for implementation at Charter School:

1. For students in all grades (K through 12) in independent study at the Charter School the maximum length of time that may elapse between when an assignment is made and when that assignment is due shall be 20 school days.
2. The Executive Director or designee shall conduct an evaluation to determine whether it is in the best interests of the pupil to remain in independent study upon the following triggers:
  - a. When any student in grades K-12 **misses two or more** assignments during any period of 20 school days,
  - b. In the event a Student’s educational progress falls below satisfactory levels as determined by the Charter School’s Multi-Tiered System of Supports (MTSS), which considers ALL of the following indicators:
    - i. The pupil’s achievement and engagement in the independent study program, as indicated by the pupil’s performance on applicable pupil-level measures of pupil achievement and pupil engagement set forth in Education Code Section 52060(d) paragraphs (4) and (5).
    - ii. The completion of assignments, assessments, or other indicators that evidence that the pupil is working on assignments.
    - iii. Learning required concepts, as determined by the supervising teacher.
    - iv. Progressing toward successful completion of the course of study or individual course, as determined by the supervising teacher.

Teachers and certificated staff use MTSS to enhance student comprehension of content by providing remediation strategies. MTSS that focuses on aligning initiatives and resources to address the needs of all students. It is a comprehensive framework that aligns academic, behavioral, and social-emotional learning in a fully integrated system of support for the benefit of all students. MTSS offers the potential to create systematic change through intentional integration of services and supports to quickly identify and meet the needs of all students. The Charter School utilizes a Response to Intervention (RTI2) Model to determine how individual students are responding to strategies, interventions, and supports within the multi-tiered system. In an RTI2 Model, instructional staff identify at-risk students, regularly monitor student learning, provide research-based interventions, and utilize a systematic approach to ensuring academic success for all students. This problem-solving approach continually examines student response and adjusts based on data and a documented feedback system.

A written record of the findings of any evaluation made pursuant to this subdivision shall be treated as a mandatory interim pupil record. The record shall be maintained for a period of three years from the date of the evaluation and, if the pupil transfers to another California public school, the record shall be forwarded to that school.

3. The Charter School shall provide content aligned to grade level standards that is provided at a level of quality and intellectual challenge substantially equivalent to in-person instruction. For high school grade levels this shall include access to all courses offered by the Charter School for graduation and approved by the UC or CSU as credible under the A-G admissions criteria.
  
4. The Charter School has adopted tiered reengagement strategies for the following pupils:
  - a. all pupils who are not generating attendance for more than three (3) school days or 60% of the instructional days in a school week, or 10 percent of required minimum instructional time over four continuous weeks of the Charter School's approved instructional calendar;
  - b. pupils found not participatory pursuant to Education Code Section 51747.5 for more than the greater of three schooldays or 60 percent of the scheduled days of synchronous instruction in a school month as applicable by grade span; or
  - c. pupils ~~or~~ who are in violation of the written agreement pursuant to Education Code Section 51747(g).

These procedures shall include, but are not necessarily limited to, all of the following: ~~are~~ as follow:

- a. Verification of current contact information for each enrolled pupil;
- b. Notification to parents or guardians of lack of participation within one school day of the recording of a non-attendance day ~~absence~~ or lack of participation;

- c. A plan for outreach from the Charter School to determine pupil needs including connection with health and social services as necessary. The Charter School developed trauma informed crisis response systems which are sensitive to the emotional needs of students and family members. A key component of the crisis response system is forging strong school-to-home relationships, centered on trust and two-way communication. Charter School staff, including administrators, teachers, education specialists, counselors, nurses and school psychologists remain connected with students and their families through in-person meetings, home visits, secure texts, emails, video conferences, and phone calls to conduct informal conversations focused on health and social-emotional needs. The Charter School continues to provide information to families in both English and Spanish regarding community-based resources for health and wellness, food options, distance learning tools, and other basic needs;
- d. When the evaluation described above under paragraph 2.b. is triggered to consider whether remaining in independent study is in the best interest of the pupil A clear standard for requiring ; a pupil-parent-educator conference shall be required to review a pupil's written agreement and reconsider the independent study program's impact on the pupil's achievement and well-being, consistent with the policies adopted pursuant to paragraph (4) of subdivision (g) of Education Code Section 51747. This conference shall be a meeting involving, at a minimum, all parties who signed the pupil's written independent study agreement.

4.5. The following plan shall be in place in accordance with Education Code Section 51747(e) for synchronous instruction and live interaction:

- a. For pupils in transitional kindergarten through grade 3, inclusive, the plan to provide opportunities for daily synchronous instruction for all pupils throughout the school year by each pupil's assigned supervising teacher shall be as follows:
  - i. Synchronous instruction in Grades TK-3: Students have one or more daily opportunities for synchronous instruction in the following ways;
    - (1) In-person one-one-one tutoring from the supervising teacher. This one-on-one support is focused on meeting the individual learning needs of the student. Supervising teachers personalize conversations and assignments, adapt to the student's communication style, and gauge student's progress and mastery.
    - (2) In-person small group tutoring sessions from the supervising teacher. Small group tutoring sessions consist of the supervising teacher leading direct instruction, presentations, guided student practice, assessments and discussion periods.
    - (3) Virtual tutoring sessions from the supervising teacher. Virtual tutoring sessions that incorporate interactive components such as; chat rooms, polls, surveys and shared documents. Students participate through live video, audio and meeting chats.
  - ii. Live interaction for Grades TK-3: General Education Teachers, Special Education Teachers, Certificated Teacher Resource, Counselors, and

school health staff will interact with students through in-person meetings, virtual conferences, home visits, and telephonically to discuss academic progress and achievement, and educational needs. Live interactions also include social-emotional and behavior needs and availability of services and resources.

- b. For pupils in grades 4-8, inclusive, the plan to provide opportunities for daily live interaction between the pupil and a certificated or non-certificated employee of the Charter School and at least weekly synchronous instruction for all pupils throughout the school year by each pupil's assigned supervising teacher shall be as follows:
  - i. Synchronous instruction in Grades 4-8: Students have one or more weekly opportunities for synchronous instruction in the following ways;
    - (1) In-person one-one-one tutoring from the supervising teacher. This one-on-one support is focused on meeting the individual learning needs of the student. Supervising teachers personalize conversations and assignments, adapt to the student's communication style, and gauge student's progress and mastery.
    - (2) In-person small group tutoring sessions from the supervising teacher. Small group tutoring sessions consist of the supervising teacher leading direct instruction, presentations, guided student practice, assessments and discussion periods.
    - (3) Virtual tutoring sessions from the supervising teacher. Virtual tutoring sessions that incorporate interactive components such as; chat rooms, polls, surveys and shared documents. Students participate through live video, audio and meeting chats.
  - ii. Live interaction for Grades 4-8: General Education Teachers, Special Education Teachers, Certificated Teacher Resource, Counselors, and school health staff will interact with students through in-person meetings, virtual conferences, home visits, and telephonically to discuss academic progress and achievement, educational needs, and college/career planning. Teachers and certificated staff use these interactions to enhance student comprehension of content by providing remediation strategies. Live interactions also include social-emotional and behavior needs and availability of services and resources.
- c. For pupils in grades 9-12, inclusive, the plan to provide opportunities for at least weekly synchronous instruction for all pupils throughout the school year by each pupil's assigned supervising teacher shall be as follows:
  - i. Synchronous instruction in Grades 9-12: Students have one or more weekly opportunities for synchronous instruction in the following ways;
    - (1) In-person one-one-one tutoring from the supervising teacher. This one-on-one support is focused on meeting the individual learning needs of the student. Supervising teachers personalize

conversations and assignments, adapt to the student's communication style, and gauge student's progress and mastery.

- (2) In-person small group tutoring sessions from the supervising teacher. Small group tutoring sessions consist of the supervising teacher leading direct instruction, presentations, guided student practice, assessments and discussion periods.
- (3) Virtual tutoring sessions from the supervising teacher. Virtual tutoring sessions that incorporate interactive components such as; chat rooms, polls, surveys and shared documents. Students participate through live video, audio and meeting chats.

- ii. Live interaction for Grades 9-12: General Education Teachers, Special Education Teachers, Certificated Teacher Resource, Counselors, and school health staff will interact with students through in-person meetings, virtual conferences, home visits, and telephonically to discuss academic progress and achievement, educational needs, and college/career planning. Teachers and certificated staff use these interactions to enhance student comprehension of content by providing remediation strategies. Live interactions also include social-emotional and behavior needs and availability of services and resources.

5.6. The following plan shall be utilized to transition pupils whose families wish to return to in-person instruction from independent study expeditiously, and, in no case, later than five instructional days: For parents who choose to return their student to a traditional school setting for more in-person instruction the school's student services department, including the school counselors, will assist parents in obtaining student records and contacting the new school to help with the transition.

6.7. A current written agreement/Master Agreement shall be maintained on file for each independent study pupil, including but not limited to, all of the following:

- The manner, time, frequency, and place for submitting a pupil's assignments, for reporting his or her progress, and for communicating with a pupil's parent or guardian regarding a pupil's academic progress.
- The objectives and methods of study for the pupil's work, and the methods utilized to evaluate that work.
- The specific resources, including materials and personnel, that will be made available to the pupil. These resources shall include confirming or providing access to all pupils to the connectivity and devices adequate to participate in the educational program and complete assigned work.

- A statement of the policies adopted pursuant to subdivisions (a) and (b) regarding the maximum length of time allowed between the assignment and the completion of a pupil's assigned work, the level of satisfactory educational progress, and the number of missed assignments allowed prior to an evaluation of whether or not the pupil should be allowed to continue in independent study.
- The duration of the independent study agreement, including beginning and ending dates for the pupil's participation in independent study under the agreement. No independent study agreement shall be valid for any period longer than one school year.
- A statement of the number of course credits or, for the elementary grades, other measures of academic accomplishment appropriate to the agreement, to be earned by the pupil upon completion. Students in grades K-5 are expected to complete work assigned in each core subject area, providing for at least one year's academic growth per year. Students in grades 6-12 are expected to earn one credit per month or 12 credits per year. Students choosing to graduate from the Charter School shall have earned 42 credits in specified courses for graduation.
- The inclusion of a statement in each independent study agreement that independent study is an optional educational alternative in which no pupil may be required to participate. In the case of a pupil who is referred or assigned to any school, class or program pursuant to Education Code Section 48915 or 48917, the agreement also shall include the statement that instruction may be provided to the pupil through independent study only if the pupil is offered the alternative of classroom instruction.
- A statement detailing the academic and other supports that will be provided to address the needs of pupils who are not performing at grade level, or need support in other areas, such as English learners, individuals with exceptional needs in order to be consistent with the pupil's individualized education program or plan pursuant to Section 504 of the federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794), pupils in foster care or experiencing homelessness, and pupils requiring mental health supports.
- Each written agreement shall be signed, prior to the commencement of independent study, by the pupil, the pupil's parent, legal guardian, or care giver, if the pupil is less than 18 years of age, the certificated employee who has been designated as having responsibility for the general supervision of independent study, and all persons who have direct responsibility for providing assistance to the pupil. For purposes of this paragraph "caregiver" means a person who has met the requirements of Part 1.5 (commencing with Section 6550) of the Family Code.

- Written agreements may be signed using an electronic signature that complies with state and federal standards, as determined by the California Department of Education, that may be a marking that is either computer generated or produced by electronic means and is intended by the signatory to have the same effect as a handwritten signature. The use of an electronic signature shall have the same force and effect as the use of a manual signature if the requirements for digital signatures

and their acceptable technology, as provided in Section 16.5 of the Government Code and in Chapter 10 (commencing with Section 22000) of Division 7 of Title 2 of the California Code of Regulations, are satisfied.

- For the 2021–22 school year only, the Charter School shall obtain a signed written agreement for an independent study program of any length of time no later than 30 days after the first day of instruction in an independent study program or October 15, whichever date comes later.
- If a new teacher takes over the supervising teacher, he or she shall sign an addendum. Any changes to the Master Agreement will be noted in an addendum agreement.
- The Master Agreement shall include subsidiary agreements such as the Assignment and Work Records. The independent study agreement for a student shall include a study plan that represents the same amount of study that would be required of a student in the classroom for the student’s grade level for every school day covered by the agreement.

The President/CEO or designee ~~shall~~may establish regulations to implement this policy in accordance with the law.

Charter School shall comply with the Education Code sections 51745 through 51749.3 and the provisions of the Charter Schools Act of 1992 and the State Board of Education regulations adopted there under.

Students engaging in independent study must be residents of the county where the Charter School is authorized or an adjacent county.

Students who are 19 -22 years of age may engage in independent study through the regular high school program, apart from Adult Education, only if they have been continuously enrolled in public school upon turning 19 and without a break in enrollment since that time, and making satisfactory progress toward a high school diploma (or, if a student in special education, satisfactory progress in keeping with an IEP).

Each student’s independent study shall be coordinated, evaluated, and carried out under the general supervision of a certificated employee.



**Student  
Success  
Programs**

# Internal Fiscal Control Policies

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# Student Success Programs Nonprofit Corporation

## Internal Control Overview

Student Success Programs Nonprofit Corporation established control over its operations by setting goals, objectives, budgets and performance expectations. Internal control helps an organization attain operational goals and guiding principles, producing reliable financial reports, and ensuring compliance with applicable laws and regulations. Internal controls provides the means to direct, monitor, and measure an organization's assets and resources and plays an important role in protecting it from fraud, abuse or misappropriation.

Student Success Programs Nonprofit Corp. established internal control procedures to accomplish the following:

1. Prevent management from overriding internal controls.
2. Ensure ongoing state and federal compliance.
3. Assure the governing board that the internal control system is sound.
4. Help identify and correct inefficient processes.
5. Ensure that employees are aware of the expectation that proper internal controls will be utilized.

The Chief Business Officer ("CBO") and Finance Administrator oversee the integration of all five internal control components into one cohesive structure. The Leadership team provides leadership and direction to managers and reviews and gives them feedback on their internal control decisions. In turn, the managers assign the responsibility for establishing specific internal control policies and procedures, control activities and monitoring of the personnel responsible for unit functions.

The Governing Board works as a group to provide governance, guidance and oversight. Individual board members particularly enhance the control environment when they are informed, free of bias, inquisitive, conduct themselves in a principled and ethical manner, and expect the same standard of conduct from everyone in the organization.

Independent auditors assess whether the controls are properly designed and implemented, and monitor whether the controls are working effectively. They also make recommendations for improving internal controls.

The following basic concepts and procedures help ensure a strong internal control structure:

- **System of checks and balances** – Formal procedures should be implemented to initiate, approve, execute, record and reconcile transactions. Key areas requiring checks and balances include payroll, purchasing, accounts payable and cash receipts.

- **Segregation of duties** – Adequate internal accounting procedures must be implemented and necessary changes made to segregate job duties and protect the charter’s assets. No single employee should handle a transaction from initiation to reconciliation, and no single employee should have custody of an asset, such as cash, and maintain the records of its transactions.
- **Staff cross-training** – More than one employee should be able to perform each job. Each staff member should be required to use accrued vacation, and another staff member should be assigned to perform those duties at that time. Inadequate cross-training is often a problem regardless of the size of an organization.
- **Use of prenumbered documents** – Checks and cash receipts should all be printed by an entity independent of the school. Physical controls should be maintained over the check stock and cash receipt books. Using prenumbered documents without an independently reconciled log of numbers is insufficient.
- **Asset security** – Cash should be deposited daily, and the charter’s other property, such as computers and other equipment, should be secured. Access to supplies and equipment should be restricted to designated employees.
- **Timely reconciliations** – Bank statements and account balances should be reconciled monthly by an employee independent of the individual who is assigned to the original transaction and recording. For example, the office employee reconciling the checking account should not be the same person who maintains the check stock.

# General Procedures

- Management provides leadership in creating an atmosphere of control consciousness.
- The structure is clearly established and communicated.
- The functions and responsibilities assigned to specific departments or individuals are clearly defined.
- Current organizational chart is maintained.
- Duties are separated so that no individual has complete authority over an entire financial transaction.
- The California School Accounting Manual is used as a tool to adhere to accounting procedures.
- The Chart of Accounts (Standardized Account Code Structure) is kept current.
- Approval authority for financial transactions is established.
- Minutes of Board meetings are maintained. The minutes include approval or amendment of the minutes of the preceding meeting. It also includes a signed copy of the complete text of Board resolutions.
- Annual audit report is on the board agenda, reviewed, and accepted at a properly scheduled Board meeting.
- The Governing Board approves and adopts the current preliminary operational budget in June of the prior fiscal year.
- The Governing Board approves the school attendance calendars.
- The Governing Board shall adopt a Conflict of Interest Code.

# Accounts Receivable

The goals of Student Success Programs Nonprofit Corp. are as follows:

- Each entry to the accounts receivable ledger is supported by documentary evidence.
- Postings are made by other than those having access to incoming receipts.
- There is periodic follow-up on outstanding balances.

## General Procedures

- Aged schedules of receivables are periodically reviewed by designated employees not responsible for billings, cash or receivables.
- Adjustments of receivables shall be approved by the Finance Administrator.
- The individual responsible for maintaining receivable records do not have access to cash, cannot authorize adjustments to receivables and do not authorize accounts receivable transactions.
- Actual receipts are compared to amounts anticipated and any unusual variances are investigated.

# Attendance Accounting

The goals of Student Success Programs Nonprofit Corp. are as follows:

- All attendance data is accurately posted monthly.
- On a weekly and monthly basis, summarize attendance data for reporting purposes.

## General Procedures

- The same symbols are used school-wide for attendance accounting.
- Attendance records shall be kept in a secured area when not in use.
- All attendance data include grade, category, and absence justifications.
- All attendance data are summarized properly for both School reports and State ADA reports.
- All employees are properly trained and aware of what constitutes an excused and apportionment absence.
- All reports are reconciled with the supporting documents.
- Data processing generated ADA reports are reconciled to the original reports.
- School attendance calendar is approved by the Governing Board and properly implemented. It shall comply with the requirement of the California Department of Education.
- Procedures are in place to assure non-duplication of attendance.
- Parent approval is included in the Individualized Education Program file as it relates to pupil placement.

- A standardized agreement shall be used by Student Success Programs Nonprofit Corp. for the independent study programs.
- Pupils in independent study are credited with only one day of attendance per calendar day and only as work are verified by a certificated employee.

# Budget Procedures

Student Success Programs Nonprofit Corporation shall develop a budget that supports the goals of the schools. When preparing the annual budget, it shall consider factors such as student population, past years' experience and trends, need for new services, expansion or curtailment of existing services, estimated revenues and proposed expenditures, governing board and leadership priorities. It is the goal of Student Success Programs Nonprofit Corp. to prepare a budget, which communicates its goals and objectives and serves as a benchmark against which actual performance is measured.

- The budget process shall include:
  - Enrollment projections and staffing ratios;
  - Income projections and local control funding formula calculation;
  - Audit of personnel database which includes changes in staffing, new positions, vacant positions, full time equivalency calculation and salary movement in the salary schedule i.e. salary step increases
  - Employee Benefits which includes determination of rates to use in projecting benefits for retirement contributions, social security, unemployment insurance and workers' compensation, and estimating increases regarding component costs of health and welfare benefit costs
  - Monitor Governor's budget items for educational programs
  - Monitor legislation or initiatives that impact funding
  - Contracts in process and negotiations with the key suppliers
  - Non-personnel budgets based on the goals and past years' experience and trends
  - Fixed cost such as utilities, facility leases, service agreements and insurance
  
- The Governing Board shall approve the preliminary operational budget by June of each year for the subsequent fiscal year.
  
- The Governing Board shall approve the expenditure and revenue plan for the period.
  
- Student Success Programs Nonprofit Corp. assures that expenditures are incurred in conformity with the budget and plan of operation.
  
- Budget versus actual reporting shall be provided on a timely basis and explanations shall be provided for significant deviations.

- Revenue and expense budgets shall be prepared for each governmental fund.
- Budgets are reviewed at least quarterly and budget revisions are prepared and submitted for Board approval to reflect appropriate changes in management plans.
- Periodic budget and actual financial reports include encumbrances and other expenditure commitments.
- Finance Division approves the availability of funds prior to issuance of a purchase order, inventory issue, or expenditure commitment.
- Budget shall include a minimum of three percent general or working capital reserve, or the level of reserve required by the charter authorizer.
- Interim reports are provided to the governing board well in advance before a scheduled board meeting for approval/ratification. It shall be presented in the meeting.
- Interim Reports and narratives shall be submitted to the sponsoring district and county office of education according to the established guidelines mandated by the State.
- Multi-year budget projections shall be done periodically by Student Success Programs Nonprofit Corp.

# Cash

The goals of Student Success Programs Nonprofit Corp. are as follows:

- Collections are properly identified, control totals are developed, and collections are intact and promptly deposited.
- Checks are prepared based on adequate and approved documentation, signed, and mailed.
- Bank accounts and cash on hand are subject to effective custodial accountability procedures and physical safeguards.
- Transactions are recorded promptly and accurately with adequate detail and appropriate reports are issued.

## Cash in the County Treasury

- Cash in the County Treasury shall be reconciled monthly.
- Stale dated warrants over six months shall be reviewed and canceled.

## Cash Receipts

- Cash controls regarding incoming mail:
  - Prenumbered receipts shall be issued for all cash collections. Cash receipts shall be recorded when received and it will be secured at all times.
  - Remittances will be compared with bank deposits. Check remittances are restrictively endorsed by a person other than the one who will deposit the check.
- All receipts shall be recorded promptly and deposited intact at appropriate regular intervals.
- Receipts shall be identified by source and/or budgetary account.

- Receipts are periodically reconciled to deposits.
- Loans and advances to employees are strictly prohibited.

#### Revolving Cash Fund

- The purpose for the account shall be specified by Student Success Programs Nonprofit Corp. and shall be part of the accounting policies.
- The amount appropriated for this account shall not exceed \$20,000.
- The account shall be reconciled monthly.
- Signing of blank checks is prohibited.
- Drawing of checks to cash or bearer is prohibited.
- The authorized signatories shall be the President/CEO or the CBO/Treasurer/CFO.
- Disbursements are limited to transactions that cannot be paid through the regular claims process.
- Blank checks are kept in a secure place.
- Duties are adequately separated. Different persons prepare checks, sign checks, reconcile bank accounts, and have access to cash receipts.
- Adequate documentation shall be required for all disbursements.

#### Cash Accounts Outside the County Treasury

- Bank accounts outside the County Treasury shall be approved by the Governing Board.
- Two signatures shall be required for checks except for the Revolving Cash Fund.
- Bank accounts shall be reconciled by someone who does not sign or prepare checks or receive cash.

- Reconciliation shall be reviewed by someone other than the preparer.
- Signatures and check endorsements shall be examined by the person other than the one who prepares the check at least on a test basis.
- Accounting for numerical sequence of checks shall be performed periodically.
- Book balances are reconciled to general ledger accounts.
- Comparisons of deposit amounts and dates made with cash receipt entries shall be performed.
- Checks outstanding for a long period of time shall be investigated and canceled or reissued.
- Cash overages and shortages shall be reviewed periodically and appropriate corrective action shall be taken.
- The bank account shall be an interest-bearing account.

# Employee Compensation and Benefits

The goals of Student Success Programs Nonprofit Corp. are as follows:

- Employment, separation, wage rates, salaries and deductions are authorized and documented. Payroll and personnel policies shall be in compliance with grant agreements, Federal, State, and local laws.
- Time and attendance data are properly reviewed and approved.
- Time and attendance data are properly processed, documented, and coded for account distribution.
- Computations for gross pay, deductions and net pay are accurate and based on authorized time and rates.
- Payments for employee compensation and benefits are made to, or on behalf of, only bona fide employees for services performed as authorized.
- Employee compensation and benefit costs are properly accumulated, classified and summarized in the accounts.

## General Procedures

- The following duties are performed by different employees:
 

<u>Separate</u>	<u>From</u>
Timekeeping and Supervision	Personnel, payroll processing, paycheck distribution, and general ledger
Payroll processing	General Ledger
Employee who hires or terminates employees, approves time reports, and prepares payroll	Paycheck distribution

### Separate

Timekeeping and  
Supervision

Payroll processing

Employee who hires or terminates  
employees, approves time  
reports, and prepares payroll

### From

Personnel, payroll processing,  
paycheck distribution, and  
general ledger

General Ledger

Paycheck distribution

- Changes in employment including additions, terminations, salary and wage rates, stipend, and payroll deductions shall be properly authorized, approved and documented.
- All changes are promptly reported in writing to the payroll processing department.
- Personnel policies are written and available to all employees.
- Payroll expenditure accounts are periodically reviewed and compared to current assignments.
- Payroll expenditures for Federal and State categorical programs are identified separately. These payroll expenditures shall be reviewed for compliance with grant restrictions.
- Procedures for approving vacations, sick leave, and personal necessity leave are established.
- Attendance records are maintained for each employee. Leave balances are recorded monthly.
- Access to employees' master files is limited to authorized employees.
- Payroll are reviewed and approved by a knowledgeable official independent from the person who process payroll.
- Payroll or labor distribution shall be reviewed and compared with budget amounts.
- Employee benefits, including payroll taxes and health insurance benefits shall be distributed to the appropriate expenditure object and program accounts on a regular basis.
- Employees are required to provide identification before being given the payroll warrant.
- Employees are prohibited from accepting another employee's payroll warrant without written authorization.
- Payroll advances are strictly prohibited.
- Procedures are established for the timely filing of credential information with the County Superintendent of Schools.
- Position control system shall be implemented to correlate the personnel and payroll functions with the

budget functions.

- Total of warrants and automatic deposits are compared to actual number of employees working.
- Proper documentation shall be maintained to verify automatic deposits.

# Purchasing and Payables

The goals of Student Success Programs Nonprofit Corp. are as follows:

- All requests for goods and services are initiated and approved by authorized individuals, and are in accordance with budget and appropriation guidelines.
- All purchase orders are based on valid, approved requests and are properly executed as to price, quantity and vendor.
- All materials and services received agree with the original orders.
- All invoices processed for payment represent goods and services received and are accurate as to terms, quantities, prices and extensions; account distributions are accurate and agree with established account classifications.
- All checks are prepared based on adequate and approved documentation, signed and mailed.
- All disbursement, accounts payable, encumbrance, or obligation transactions are recorded promptly and accurately in regards to payee and amount.
- All entries to accounts payable, reserve for encumbrances, asset and expense accounts and cash disbursements are properly accumulated, classified and summarized in the accounts.
- Funds are disbursed in accordance with applicable laws, regulations and grantor agreements.

## General Procedures

- The following duties shall be performed by different employees:

### Separate

Requisitioning

Purchasing and receiving

### From

Invoice processing, accounts payable and

general ledger

Separate  
Requisitioning and  
Receiving

From  
Purchasing

Invoice processing and  
accounts payable

General Ledger

Disbursement preparation

Disbursement approval

- Purchase of goods and services initiated only after approval by designated administrator.
- Reimbursements to employees for goods purchased follow normal approved procedures.
- Finance Division shall verify availability of funds to pay proposed expenditures prior to authorization of purchase.
- Requisitions and purchase orders shall include adequate technical specifications and purchase prices.
- Purchase orders are sequentially numbered for all purchases and shall be used for all purchases.
- Changes to contracts or purchase order shall be subject to the same controls and approvals as the original documents.
- Encumbrance procedures are in place to restrict portions of the budget for which commitments or contractual obligations have been made.
- Purchasing needs are consolidated to avoid frequent minor purchases.

### Receiving

- Proof of receipt for all purchased goods shall be required.
- Receiving report e.g. delivery receipt and packing slip shall include the following information:
  - Purchase order number
  - Vendor

- Date received, quantity received and whether receipt is partial or complete
- Item number and description of goods as shown on the purchase order  
Receiving employee's signature
- Indication that the goods meet quality standards

### Payables

- Invoice processing procedures shall include:
  - Approved purchase orders
  - Signed receiving reports
  - Original invoice, comparing invoice quantities, price and terms with those documented on the purchase order
  - Comparing invoice quantities with the quantity shown on the receiving report  
Verifying mathematical calculations
  - Paying only on the basis of original invoices
  - Comparing amount due with outstanding credit memos
  - Analysis of the reserve for encumbrances and adjustment made as necessary
  
- Material Resource Clerk and the Material Resource Lead shall record and follow up on partial deliveries.
  
- Material Resource Clerk shall promptly notify the Accounts Payable Department regarding returned purchases.
  
- Accounts Payable Department shall correlate returned purchases with credit memos.
  
- Original invoices and supporting documents shall be stamped or otherwise canceled to prevent duplicate payments.
  
- Student Success Programs Nonprofit Corp. shall issue IRS 1099 forms in compliance with the Internal Revenue Service filing requirements.
  
- Student Success Programs Nonprofit Corp. shall comply with State law on sales and use tax.

# Student Success Programs Nonprofit Corporation

## Bank Card Policy and Procedures

### AREA OF RESPONSIBILITY

#### **Union Bank of California**

Union Bank of California is the bankcard company who will issue bankcard.

#### **Cardholder**

There are only three cardholders in Student Success Programs Nonprofit Corp. They are the President and CEO, the Chief Business Officer and the Board and President Administrative Support. The cardholder is responsible for ensuring the bankcard is used appropriately and all purchases of commodities are within the purchasing procedures and policies.

#### **Approver**

The Approver is primarily responsible for reviewing Cardholder purchases to ensure the purchases were appropriate and items or services are not on the prohibited list. Complete and proper documentation must be included with all purchases. Approver's signature attests to the validity and completeness of the submitted package.

#### **Finance Division/Accounts Payable Department**

Accounts Payable Department is responsible for reviewing all monthly cardholder statements for appropriateness of purchases and preparing all payments to First Bankcard and reviews all monthly cardholder statements for necessary documentation. Accounts Payable Department will assist cardholders with any problems regarding payments made to First Bankcard and charges to the proper budgetary accounts.

### **OFFICIAL PROCUREMENT CARD BUSINESS USES**

- Airfare
- Emergency Supplies
- Fuel (rental vehicle)
- Hotels
- Meals (no alcoholic beverages)

- Outside Print Requests while on travel
- Parking (airport, hotel)
- Registration (including materials)
- Rental Cars and/or Rental Car Insurance
- Taxi
- Towing (emergency only)

#### **PURCHASES FROM VENDORS OR RETAIL STORES WHO DO NOT ACCEPT PURCHASE ORDERS**

- Books/Textbooks/Testing Materials and Supplies
- Catering
- Contracts
- Federal Express
- Furniture
- Instructional items (Classroom/Conference/Reference/Training/Workshops)
- Lakeshore Learning Materials
- Field Trips (Amusement Park Tickets for instructional purposes)
- Office Supplies
- Subscriptions
- United Parcel Service
- Dues and Memberships
- U.S. Postal Service products/services
- Consumable Supplies
- Classroom Supplies
- Communications and telephone products

#### **PROHIBITED USES**

- Air Phone
- Alcoholic Beverages
- Cash Advances
- Equipment
- Gambling, Betting
- Insecticides

- Legal Fees (Court costs, Fines, Bail Bond)
- Lottery Tickets
- Maintenance Agreements
- Personal items
- Political or Religious Organizations
- Rental or lease of land or buildings
- Securities, insurance
- Splitting or purchases to circumvent the quote procedure
- Tax Payments
- Tobacco Products

## PROCEDURES FOR CARDHOLDERS

- **Responsibility** – The cardholder is responsible for ensuring the bankcard is used appropriately and that all purchases are in compliance with Student Success Programs Nonprofit Corp.'s purchasing procedures and policies.
- **Security of Bankcard** – The cardholder is responsible for the security of the bankcard and will immediately report the loss to First Bankcard and the Approver.
- **Determine the Need** – The cardholder screens request to determine if the purchase is an appropriate use of the bankcard.
- **Receipt/Invoice** – The vendor shall be required to itemize the receipt/invoices. An itemized receipt/ invoice shall consist of the following:

### Itemized Receipt/Invoice for Goods

Vendor Name

Description of items purchased

Quantity of purchased

Unit price per item

Extended price

Sales tax

Shipping charges

Purchase total

It is the responsibility of the cardholder to forward the **original vendor receipt/invoice or credit slip** to the Finance Division within the week that the transaction occurred.

In the case of a lost receipt, it is the responsibility of the cardholder to contact the vendor and request a duplicate copy. If after contacting the vendor, a duplicate copy is still not obtained, the cardholder must attach an Affidavit for Loss Receipt to the statement in the order as the transaction appeared on the statement. The lost receipt affidavit should include the date of purchase, vendor name, the amount of purchase, for whom the purchase was for, what was purchased, why the items were purchased, and the reason original receipt was not available.

### **MONTHLY BANKCARD STATEMENT**

At the close of each billing cycle, the Finance Division will receive the bank statement from First Bankcard. The Accounts Payable Department reviews the statement for accuracy and reconciles the bank statement with the itemized vendor receipts/invoices.

If an item is billed incorrectly, the cardholder is responsible for contacting the vendor and request to be credited for the incorrect amount.

If there is a credit slip and this reversal transaction does not appear on the monthly bankcard statement, the Accounts Payable Department will process the incorrect charge for payment and the Accounts Payable Department will verify that the credit is in the next month bankcard statement.

If the cardholder does not receive a credit, or the vendor refuses to provide the cardholder with a credit, the cardholder is responsible for contacting First Bankcard on questionable or disputed transactions on the bank statement within 30 days after receipt of the Monthly Bankcard Statement.

### **PROCEDURES FOR APPROVER**

Approver for the bankcard of the Chief Business Officer is the President and CEO. Approver for the President and CEO is the CBO. Approver for the Board and President Administrative Support is the President and CEO.

Approver signs the itemized sheet that the Accounts Payable Department prepared in order to process payments.

## **PROCEDURES FOR ACCOUNTS PAYABLE**

### **Reconcile Bank Statements**

Upon receipt of the cardholder's bank statements and documentation, Accounts Payable Department will be responsible for the following:

- Review charges to ensure that purchases are appropriate, not on the prohibited list, required documentation (bank statement, invoices/receipts, and credit slips) are included sequentially and itemization is completed.

### **Processing of Payment**

After the bank statement has been verified for accuracy, Accounts Payable Department will process payment promptly.

# Student Success Programs Nonprofit Corporation

## Reserve Policy

### **PURPOSE OF THE RESERVE FUND**

The purpose of the Reserve Fund shall be to responsibly fund and finance the General/Operation Reserve Fund; Reserve for Economic Uncertainties; and Contingency/Strategic Fund. Reserve Funds are maintained to ensure the long-term financial sustainability of the organization.

### **DEFINITION OF TERMS**

The term "Reserves" is used to describe that part of the fund balance that is freely available for its operating purposes not subject to commitments, planned expenditure and spending limits. Reserves do not include restricted funds and designated funds.

A Contingency Fund is a reserve fund set aside to handle unexpected debts that are outside the range of the usual operating budget.

Fund Balance or Carry-Over Fund is the difference between assets and liabilities. This is the fund equity of governmental and trust funds.

### **POLICY STATEMENT**

The primary object of this policy is to establish and maintain three levels of reserve funds which includes the General/Operation Reserve Fund, Reserve for Economic Uncertainties and Contingency/Strategic Fund. These funds must remain unencumbered and uncommitted at a level relative to the annual operating budget and the historical costs of operating and maintaining the organization. It will permit Student Success Programs to continue to operate during difficult financial times and maintain current level of operations while the School addresses unexpected but essential needs (e.g. the State Deferrals of Apportionment), rising employer costs in the CalSTRS and CalPERS retirement systems and rising costs in health care. A Reserve Fund shall be maintained to meet contractual liabilities should the School have to close. This includes salary payable, amounts due to creditors and commitments under leases.

### **GENERAL FUND/OPERATION RESERVE POLICY**

The General Fund is used to account for all general and unrestricted revenues and for expenditures related to providing general services for the School. For the purpose of this policy and as it applies to the General/Unrestricted Fund only, the School will establish on an annual basis the budget for Operation Reserve at a level of 3% or more of total General/Unrestricted Revenues during the development

#### **RESERVE FOR ECONOMIC UNCERTAINTY POLICY**

This portion of the end of the year fund balance shall be designated to provide for emergencies or economic events, such as revenue shortfalls that could not be anticipated. This reserve shall allow for any anticipated and unanticipated State deferrals of apportionments. The reserve for economic uncertainty shall be maintained to an amount equivalent to 3 to 7 months of the total current year's budgeted expenditures.

#### **CONTINGENCY/STRATEGIC RESERVE POLICY**

The School shall designate a Contingency/Strategic Reserve Fund which represents a portion of the current year's end of the year fund balance or carry over funds in order to provide a strategic reserve for the School's commitments for leases, a reserve fund for major repairs and improvements, capital replacements, facility acquisitions and self-insured health and welfare program. This fund shall be maintained at 15% to 25% of the current year's fund balance (carry over). This fund will support and sustain the strategic goals of the Schools.

At the first scheduled Board meeting of the year the Chief Business Officer (CBO) or the Finance Administrator will present to the Board a full status report of all reserve levels. They will be responsible for coordinating to the Board the review of this policy every two years.

This policy supersedes any existing policy adopted by the Board in reference to Fund Reserves.

# Student Success Programs, DBA Audeo Charter School and The Charter School of San Diego Federal Time & Effort Policy

## Federal Time & Effort Policy

### Overview

For time and effort costs to be charged to a federal award, activities must first be reviewed for allowability. Once an activity has been deemed allowable, newly assigned employee(s) to the position carrying out the activity and the supervisor who is in charge of reviewing their work will be trained on the Charter School's time and effort policy. Additionally, employees who must submit time & effort documentation in accordance with this policy along with their supervisor, administrative, support and fiscal staff who are involved with managing federal awards will receive annual training on accurate time and effort procedures.

### Allowability of Federal Resource Costs

Before an activity or cost can first be classified or charged to a Federal resource, it shall be reviewed by the Chief Business Officer ("CBO"), or designee. This review shall consist of:

- i. Alignment with the Charter School's current budget, or for inclusion of a subsequent budget;
- ii. Allowability of the activity or expenditure in accordance with the general standards outlined in the Education Department General and Administrative Regulations ("EDGAR") 2 CFR 200
- iii. The activity/expenditure is reasonable, necessary, and allocable cost to the program
- iv. Whether the cost or activity addresses the goals and objectives of the program
- v. If charging salaries and wages, proper documentation is provided and maintained. Documentation would include:
  - a. Position Control Report;
  - b. An appropriate job description that describes the activities to be performed;
  - c. A duty statement that, at a minimum, includes:
    - i. the tasks, functions, and responsibilities of a position;
    - ii. lists all Federal, State or Local funds used;
    - iii. provides established allocations of each fund;
  - d. Time and Effort records as described in a subsequent part of this section
- vi. Alignment to the School's Local Control and Accountability Plan ("LCAP"), Federal Addendum, or School Plan for Student Achievement ("SPSA"), as appropriate;
  - a. A program specialist will support the CBO's review when determining alignment of the activities to the LCAP, Federal Addendum, or SPSA, as appropriate, to the Charter School's academic goals.

Should activities change and percentages between cost objectives need to be adjusted, for example, the supervisor of the employee whose activities are changing will inform the CBO, or designee, to conduct a new allowability review.

### **Time and Effort Procedures**

To meet the above requirements, all employees who must complete time and effort forms must submit either a semi-annual certification, a personnel activity report ("PAR") or an alternative substitute in compliance with §200.430(i). The type of form depends on the number of cost objectives that an employee works on.

A cost objective is a program, function, activity, award, organizational subdivision, contract, or work unit of which cost data are desired and for which provision is made to accumulate and measure the cost of processes, products, jobs, capital projects, etc. (2 C.F.R. Part 200.28). See the subsequent School-wide Program in relation to cost objectives.

An Employee working on a single cost objective must have a semi-annual time certification signed by their supervisor, or designee. The semi-annual certification must be:

1. Completed at least every six (6) months (twice a year), which the Charter School has defined as July – December and January – June.
2. Reflect an after-the-fact distribution of the actual activity; and
3. Account for the total activity for which each employee is compensated.

Supervisors, or their designee, who oversee single-cost objective employee activities are responsible for submitting a signed semi-annual certification form within sixty (60) days of each designated six month period.

An employee working on multiple cost objectives must have a Personnel Activity Report (PAR). A PAR provides a written record of an employee's work activities used to document that employee's time to grants or projects and meets the following standards:

1. Reflect an after-the-fact distribution of the actual activity, not a budget estimate;
2. Account for the total work activity for which each employee is compensated;
3. Be prepared at least monthly (a separate PAR for each month) and coincide with one (1) or more pay periods; and
4. Be signed by the employee and the employee's supervisor, or designee.

The PAR will be completed by the employee performing the activity and submitted to their supervisor by the 15<sup>th</sup> calendar day of the month subsequent to the activities being reported. The supervisor will review the PAR for accuracy and work with the employee should corrections be warranted. The supervisor will have until the last calendar day of the month subsequent to the activities being reported to submit the PAR to the financial accountant of the school.

Alternative time and effort documentation by a substitute system for time accounting are also acceptable so long as the employee is specifically identifying the effort applied to each cost objective and their supervisor has reviewed and approved the document. An example would be an hourly timesheet processed through the Charter School's Enterprise Resource Planning ("ERP")/payroll system that was entered by the employee and approved by the supervisor.

These time and effort records will be submitted to the Financial Accountant assigned to the school. The Financial Accountant is charged with reviewing the records for accuracy and maintaining them in order to charge the costs of personnel compensation to federal grants.

The Finance Administrator, or designee, will be responsible for overall compliance with this process.

Signatures on time and effort documentation can be either original or electronic.

### **Training**

An employee engaged in an activity charged to a federal resource, their supervisor, or other staff that manage federal awards (administrative, fiscal, support) will receive training at least once per school year on proper time and effort procedures. The Finance Administrator, or designee, shall be responsible for developing and revising the training program as necessary and will deploy the training through a preferred medium.

### **Time and Effort Standards**

Each employee paid in full or in part with federal funds must keep specific documents to demonstrate the amount of time they spent on grant activities (2 C.F.R. §200.430(i)(1)). In addition, employees who are paid from state and local funds, but whose salaries are used for costsharing or matching on Federal awards, must also keep time and effort documentation (§ 200.430(i)(4)).

Charges to federal awards for salaries and wages must be based on records that accurately reflect the work performed. In accordance with § 200.430(i)(1), these records must:

- i. Be supported by a system of internal controls which provides reasonable assurance that the charges are accurate, allowable, and properly allocated;
- ii. Be incorporated into official records of the Charter School;
- iii. Reasonably reflect total activity for which the employee is compensated by the Charter School, not exceeding 100% of compensated activities;
- iv. Encompass federally-assisted and all other activities compensated by the Charter School on an integrated basis, but may include the use of subsidiary records as defined in the Charter School's written policy;

- v. Comply with the established accounting policies and practices of the Charter School; and
- vi. Support the distribution of the employee's salary or wages among specific activities or cost objectives if the employee works on more than one Federal award; a Federal award and non-Federal award; an indirect cost activity and a direct cost activity; two or more indirect activities which are allocated using different allocation bases; or an unallowable activity and a direct or indirect cost activity.

### **Fringe Benefits**

Compensation for personal services may also include fringe benefits given the costs are allowable to the extent that they satisfy the specific requirements addressed in §200.431. Fringe benefits are allowances and services provided by employers to their employees as compensation in addition to regular salaries and wages.

Fringe benefits include, but are not limited to, the costs of leave (vacation, family-related, sick or military), employee insurance, pensions, and unemployment benefit plans. The costs of fringe benefits are allowable provided that the benefits are reasonable and are required by law, Charter School-employee agreement, or an established policy of the Charter School.

### **School-wide Program**

In accordance with Sec. 1114 of Title I, part A, a local educational agency may consolidate and use funds under this part, together with other Federal, State, and local funds, in order to upgrade the entire educational program of a school that serves an eligible school attendance area in which not less than 40 percent of the children are from low-income families, or not less than 40 percent of the children enrolled in the school are from such families.

A school-site employee working solely on a School-wide Program ("SWP") approved by the California Department of Education ("CDE") will be viewed as a single cost objective because, for an approved SWP plan, the Charter School may use ESSA Title I funds in combination with some or all of its other federal funds and state and local general-purpose funds to upgrade the entire education program in a school.

CDE does not permit Title III, Part A to be consolidated in a school-wide program. Accordingly, school level staff paid in whole or in part with Title III would not be part of a school-wide program and therefore cannot be considered as working on a single cost objective.

### **Reconciliation and closeout procedures**

Payroll charges must match the actual distribution of time recorded on the aforementioned time reporting methods. Budget estimates or other distribution percentages determined before the services are performed do not qualify as support for activities described in this section.

Budget estimates are allowed for interim accounting purposes given the Charter School's

system for establishing estimates are reasonable approximations of the activities performed by the Employee. Should budget estimates be used, all necessary adjustments will be made such that the salaries, wages, benefits or other such compensation charged to the federal award(s) are allocated based on the actual work performed as documented by the Charter School's Time and Effort procedures.

Annual adjustments are made at year end closing if there is a difference between the budgeted amounts and actual costs.

**SAMPLE Semi-annual certification**

<b>Semi-annual Time Certification</b>		
School Name		
Period Covered	July 1, 2021 to December 31, 2021	Fiscal Year: 2021-2022
Employee Name		
Title		
<b>Cost Objective/ Program Title</b>		
Support Type 1	<b>Resource Description(s)</b>	<b>Percent of Effort</b>
	Title I	50%
	LCFF	50%
	Total	<u>100%</u>
<b><u>Essential Function</u></b>		
<p>&lt;Title&gt; supports the school-wide program of CSSD utilizing a single cost objective with two funding sources.</p>		
<b><u>Primary Duties</u></b>		
<p>Collaborate with the Administrator of Instructional Services on the planning, creation, implementation, training, and evaluation of the Instructional Plan.</p> <p>Collaborate with School Leadership Team on the implementation of Math Professional Development.</p> <p>Oversee and manage the math instructional outcomes of students and instructional staff performance to design the focus of the professional development offered to teachers.</p>		
<p>I hereby certify that this report is an after-the-fact determination of actual effort expended for the period indicated and that I have full knowledge of 100 percent activities.</p>		
Employee or Supervisory Official	Date	



## Supplement to the Annual Update to the 2021–22 Local Control and Accountability Plan

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Audeo Charter School	Veronica Ballman   School Coordinator	Email: <a href="mailto:vradtke@altusschools.net">vradtke@altusschools.net</a> Phone: (858) 678-2050

California’s 2021–22 Budget Act, the federal American Rescue Plan Act of 2021, and other state and federal relief acts have provided local educational agencies (LEAs) with a significant increase in funding to support students, teachers, staff, and their communities in recovering from the COVID-19 pandemic and to address the impacts of distance learning on students. The following is a one-time mid-year report to the local governing board or body and educational partners related to engagement on, and implementation of, these Acts.

A description of how and when the LEA engaged, or plans to engage, its educational partners on the use of funds provided through the Budget Act of 2021 that were not included in the 2021–22 Local Control and Accountability Plan (LCAP).

Audeo Charter School (Audeo) will receive additional funding from the 2021-22 Budget Act by receiving funds from the California Educator Effectiveness Grant, A-G Completion Improvement Grants, Dispute Prevention Grant and Learning Recovery Grant. These grants were not included in the 2021-22 Local Control and Accountability Plan (LCAP).

The California Educator Effectiveness Grant (CEEG) is a program that promotes educator equity, quality and effectiveness through professional learning. School staff was able to design and develop a CEEG Plan by conducting a needs assessment and collaborating with educational partners, including teachers, staff, administration, students, parents and community members. The School engaged educational partners in a variety of settings and methods, including but not limited to: LCAP Surveys, School Site Council Meetings, English Language Advisory Committee Meetings, School Instructional Meetings, Leadership Team Meetings, Altus University Trainings, Open House Events and Family Learning Series. Some of the following themes emerged from each educational partner group and contributed to the development of the CEEG Plan:

- School administrators express a need for ongoing professional learning that promotes equity and inclusion for a safe school climate while also increasing student achievement related to English Language Arts and Mathematics.
- Teachers and education specialists require professional learning to gain access to more instructional tools and curriculum resources to elevate learning for specific student groups, including students with disabilities, socio-economically disadvantaged students and English learners.

- Students and parents want access to certificated staff who can support their educational, social-emotional and mental health needs.

The CEEG Plan was presented and made available to educational partners at a public meeting on December 1, 2021. The CEEG Plan was board approved on December 9, 2021.

The A-G Completion Improvement Grant Program was established for the purpose of providing additional supports to local educational agencies to help increase the number of California high school pupils, particularly low-income students, foster youth and English Learners, who graduate from high school with A-G eligibility. Audeo engaged educational partners, including teachers, staff, administrators, students, parents and community members to develop the A-G Completion Improvement Grant Plan. Meaningful feedback was collected through multiple collaborative settings and methods, including conversations, surveys, school events, meetings and trainings. Some of the most valuable feedback collected came from School Site Council Meetings conducted in January 2022. At this meeting, educational partners analyzed achievement gaps related to historical A-G completion rates, explored existing challenges, discussed potential solutions and ideal rates of growth. The following themes emerged from educational partners as new or improved programs and services the School could provide to improve A-G completion rates for All Students, but specifically underserved student groups:

- School administrators express a need for enhanced counseling services to improve the social-emotional and mental health of students – which can lead to improved academic performance and sustain a university going mindset for all students.
- Teachers and school staff want to provide additional and targeted academic tutorials for high school students that will increase engagement in the core curriculum and credit completion rates.
- Students and parents want additional informational and planning sessions focused on the benefits of completing high school with A-G eligibility.

The A-G Completion Improvement Grant Plan will be presented and made available to the school board and community for input at a regularly scheduled board meeting. After public input is taken into consideration and plan updates are made, the revised plan will be taken to the board for approval at a separate regularly scheduled board meeting prior to April 2022.

The Dispute Prevention Grant was established by Section 160 of Assembly Bill 130 and appropriated \$100,000,000 from the General Fund to the CDE, on a one-time basis, for allocation to Special Education Local Plan Areas (SELPA). The funding is to support member local educational agencies in conducting dispute prevention and voluntary alternative dispute resolution activities to prevent and resolve special education disputes resulting from school disruptions stemming from the COVID-19 public health emergency during the period of March 13, 2020, to September 1, 2021, inclusive, in a collaborative and equitable manner.

Audeo belongs to the El Dorado County Office of Education SELPA which created a SELPA-level plan for all members. The plan includes activities focused on dispute prevention through trainings and workshops, parent outreach activities, translation of

resources, parent materials, and services to encourage parent outreach activities. Audeo staff participated in a SELPA webinar held on September 9, 2021.

The Learning Recovery Grant was established by Section 161 of AB 130 (Chapter 44, Statutes of 2021) and appropriated \$450,000,000 from the General Fund to the CDE, on a one-time basis, for allocation to Special Education Local Plan Areas (SELPAs).

The funding is to provide learning recovery support. Specifically, this funding shall be expended by SELPAs and their member LEAs for purposes of providing learning recovery support to pupils with disabilities associated with impacts to learning due to school disruptions stemming from the COVID-19 public health emergency during the period of March 13, 2020, to September 1, 2021, inclusive. Audeo worked closely with SELPA program specialist to create a Learning Recovery plan.

A description of how the LEA used, or plans to use, the additional concentration grant add-on funding it received to increase the number of staff who provide direct services to students on school campuses with an enrollment of students who are low-income, English learners, and/or foster youth that is greater than 55 percent.

Audeo Charter School (Audeo) is a single-school Local Educational Agency (LEA) and does not have such comparison schools by which to calculate staff increases. Audeo, like many other LEAs, using the additional Concentration Grant funding to increase staffing is a challenge this year. Schools overwhelmingly report difficulty in hiring staff to fill open positions for the 2021-22 school year. However, Audeo has made every effort to recruit and hire qualified instructional staff to provide direct educational services to students, particularly the Certificated Teacher Resource (CTR) position. The main function of the CTR position is to provide academic tutoring to students in small group settings. Audeo's Human Resources Department has utilized multiple online employment platforms to display position openings and has participated in a variety of job fairs at community events and at local colleges to recruit potential instructional staff. These hiring efforts are ongoing and will continue for the remainder of the school year.

A description of how and when the LEA engaged its educational partners on the use of one-time federal funds received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on pupils.

Audeo Charter School (Audeo) received one-time federal funds from the Elementary and Secondary School Emergency Relief Funds (ESSER). This includes ESSER II and ESSER III funds which are intended to support recovery from the COVID-19 pandemic. From the onset of the COVID-19 emergency, Audeo deployed a Family Needs Assessment Survey to all students and parents to gather information on overall health, mental health, academic, and physical needs. School staff, including school instructional leaders, counselors, social workers, and school nurses, followed-up with each family and provided resources and support based upon specific needs. Data collected in the Family Needs Assessment Survey also aided in the development of additional services, resources and employee trainings.

To close the digital divide, Audeo deployed Chromebooks and internet data plans to families in need of home computing and internet

access. Audeo commonly refers to this as the Altus Connect Program. Priority was given to Students with Disabilities to ensure access to Special Education services, and other underserved student groups to ensure equity and access to the full instructional program. Audeo staff continue to check-in with families regarding home technology needs and can issue Chromebooks and/or internet hotspots as needed on an ongoing basis. By providing students with health support/services, access to distance learning tools/technology and ongoing academic instruction, Audeo staff have been able to support each student's individual educational plan.

Students and families have been contacted directly by teachers, special education staff, counselors, and school instructional leaders in multiple formats including text messages, phone calls, emails, and virtual conferences. The school COVID-19 Safety Officer and Nurses have been available to provide support, community resources and guidance to students and parents. As school staff communicate with families, they document their conversations in the School's Student Information System (SIS). Staff use multiple collaborative settings such as Resource Center Meetings, Department Meetings, and Leadership Team Meetings to review intervention reports and discuss ongoing needs of students. While collaboration is focused on finding solutions to meet the needs of all students, there is an emphasis on reengaging and supporting the lowest-achieving students.

Students, parents, and family members have also participated in engagement events, including Virtual Parent Night, Senior Night, Family Learning Series, School Site Council, ELAC and College/Career Week. At each engagement event, educational partners share their experiences and provide input on existing programs and approaches. Educational partner feedback is collected, organized and analyzed by school leadership and aids in the development and/or adjustments of school plans, actions and services.

School employees have completed multiple surveys throughout the COVID-19 emergency, including the Employee Engagement Survey to gather information as to how the school can continue to provide a high-quality educational experience for students and families, in both virtual and in-person environments. Based upon employee feedback, the school has replaced and acquired new upgraded work tools, including Avaya Cloud and DocuSign. These new work tools ensure that all employees are equipped to do their job in an increasingly digital world while remaining compliant with Federal, State and local requirements.

Further input on the coordination and use of ESSER II funds was outlined in the School's Expanded Learning Opportunities (ELO) Grant Plan. The ELO Grant Plan was created with the focus of offering extended instructional learning time in a safe and supportive environment at our Resource Centers. It was presented, made available to the public and approved at a School Board Meeting on May 19, 2021. The ELO Grant Plan is available on the school website at <https://www.audeocharterschool.net/about-2/lcap/>.

An ESSER III Expenditure Plan was developed to address academic, social, emotional and mental health needs of students, as well as any opportunity gaps that existed before, and were worsened by, the COVID-19 pandemic. The ESSER III Expenditure Plan was presented, made available to educational partners and approved at the October 26, 2021 School Board Meeting. The expenditure plan is available on the school website at <https://www.audeocharterschool.net/about-2/public-notices/>.

A description of how the LEA is implementing the federal American Rescue Plan Act and federal Elementary and Secondary School Emergency Relief expenditure plan, and the successes and challenges experienced during implementation.

The American Rescue Plan (ARP) provided Audeo with additional Elementary and Secondary School Emergency federal relief dollars, more commonly referred to as ESSER III funds. The expenditure plan included strategies for continuous and safe in-person learning, addressing the impact of lost instructional time and other uses.

A primary focus of providing continuous and safe in-person learning was keeping our Resource Centers open and available to students and staff. Audeo was able to increase the frequency that each site is cleaned, disinfected and sanitized to help mitigate the spread of COVID-19. Each site has a 35-point cleaning plan that includes offices, conference rooms, instructional areas, restrooms and kitchen areas. Implementing and sustaining this level of cleanliness has been a success as demonstrated by not having to close any sites since fully reopening in May 2021.

Our executive safety committee and safety ambassadors at each site have worked closely to ensure all personal protective equipment and supplies are up to date and at appropriate stock levels. Through our own purchasing practices and supplies provided by the San Diego County Office of Education (SDCOE), we have not had PPE shortages. The executive safety committee addressed air quality concerns by looking at current resources and determining if any enhancements were necessary. Maintaining our current HVAC systems and increasing filter quality to MERV 8 or higher has been recommended for each site and Audeo entered into quarterly maintenance agreements to regularly service these systems. To enhance the air quality of the HVAC system, air filters have been placed at all locations, including office spaces. These air filters scrub 700 square feet of air every 30 minutes, and each site will receive one or more filters based on their square footage. Supply was low for these items and so several purchases had to be made until we had the appropriate number of filters per site.

To address the loss of instructional time, Audeo planned to add paraprofessional staff to provide targeted Math and ELA tutorials to students failing or at risk of failing with the intention to increase student academic confidence, skills and knowledge. This action has been difficult to implement given the short supply of qualified labor and the general market of job seekers in the education industry. We have attended multiple job fairs, expanded online recruitment efforts across multiple platforms (EdJoin, LinkedIn) and dedicated human resources staff to recruit paraprofessionals. While some recruitment efforts have been successful, this remains an area of focus.

With an existing Altus Connect program that provides data-enabled Chromebooks to students, Audeo was able to quickly expand this program at the start of the Coronavirus pandemic in 2020. Our ESSER III plan includes additional Chromebooks for students who enroll and replacement of damaged technology. As we are going into our second year of the pandemic, Audeo has continued to struggle with the supply chain constraints on sourcing laptops for students. Even through strong strategic planning and close monitoring of student needs, delivery lead times continue to grow and the ability to provide units upon enrollment is a challenge.

To further reduce infections, we explored contactless enrollment options by incorporating an e-signature platform into our enrollment process with our student service center. This provides a means for our incoming students and families to effortlessly access enrollment forms on any device, including their smart phones, review the documents and provide their signature without having to deliver any documents in-person. This enrollment process improvement has been well received by our incoming students and families, which we see in their survey responses that are provided to every enrolled student. The program has been so successful that we are exploring its use for other departments.

A description of how the LEA is using its fiscal resources received for the 2021–22 school year in a manner that is consistent with the applicable plans and is aligned with the LEA’s 2021–22 LCAP and Annual Update.

Audeo has continued to responsibly utilize its fiscal resources in the 2021-22 school year to provide the necessary resources, supplies and services to our program. All employees are provided with training and updates to implement mitigation factors, like staying home when experiencing symptoms of COVID-19. Audeo recognized the need to be flexible to unplanned interruptions in our working environments, whether it be a teacher, counselor, enrollment clerk, or back-office staff. Our collaboration, knowledge and management systems allowed us to quickly evaluate the needs of our students and staff and respond appropriately. Audeo invested in technologies that allow staff to seamlessly transition their work from an office setting to their home and back again. In addition to providing the hardware necessary to enable remote work, investments in technology infrastructure have provided efficient and effective means to access instructional materials and data needed for business operations through a cloud environment.

Our health department, human resources and executive safety committee have worked closely to ensure resources for COVID testing, vaccines and PPE are given to students, families and employees. As described in the previous prompt, fiscal resources have been deployed to meet the needs identified in our Safe Return to In-Person Instruction plan, and ongoing mitigation efforts to slow/stop the spread of the coronavirus. We also provide a series of live, interactive, video broadcasts for students called Resilience in Students and Education (RISE) to ensure that mental health awareness and wellness is supported. RISE addresses students’ Social and Emotional Learning impacted by COVID-19 and developmental needs such as self-awareness, self-management, social awareness, relationship, and responsibility skills.

Audeo has hired an Equity and Inclusion Officer to collaborate with instructional staff, to identify potential student needs, and coordinate services and resources to aid students and family members. A Healthy Youth Therapist was also hired to provide counseling services and facilitate student and family referrals. Most importantly, Audeo continues to be committed to providing all students with a high-quality education that meets their individual learning needs and prepares them for college/career pathways.

## Instructions for the Supplement to the Annual Update for the 2021–22 Local Control and Accountability Plan Year

*For additional questions or technical assistance related to the completion of the Supplement to the Annual Update to the 2021–22 Local Control and Accountability Plan (LCAP), 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](mailto:lcff@cde.ca.gov).*

### Introduction

California’s 2021–22 Budget Act, the federal American Rescue Plan Act of 2021, and other state and federal relief acts have provided local educational agencies (LEAs) with a significant increase in funding to support students, teachers, staff, and their communities in recovering from the COVID-19 pandemic and to address the impacts of distance learning on students. Section 124(e) of Assembly Bill 130 requires LEAs to present an update on the Annual Update to the 2021–22 LCAP and Budget Overview for Parents on or before February 28, 2022, at a regularly scheduled meeting of the governing board or body of the LEA. At this meeting, the LEA must include all of the following:

- The Supplement to the Annual Update for the 2021–22 LCAP (2021–22 Supplement);
- All available mid-year outcome data related to metrics identified in the 2021–22 LCAP; and
- Mid-year expenditure and implementation data on all actions identified in the 2021–22 LCAP.

When reporting available mid-year outcome, expenditure, and implementation data, LEAs have flexibility to provide this information as best suits the local context, provided that it is succinct and contains a level of detail that is meaningful and accessible for the LEA’s educational partners.

The 2021–22 Supplement is considered part of the 2022–23 LCAP for the purposes of adoption, review, and approval, and must be included with the LCAP as follows:

- The 2022–23 Budget Overview for Parents
- The 2021–22 Supplement
- The 2022–23 LCAP
- The Action Tables for the 2022–23 LCAP
- The Instructions for the LCAP Template

As such, the 2021–22 Supplement will be submitted for review and approval as part of the LEA’s 2022–23 LCAP.

## Instructions

Respond to the following prompts, as required. In responding to these prompts, LEAs must, to the greatest extent practicable, provide succinct responses that contain a level of detail that will be meaningful and accessible for the LEA's educational partners and the broader public and must, to the greatest extent practicable, use language that is understandable and accessible to parents.

In responding to these prompts, the LEA has flexibility to reference information provided in other planning documents. An LEA that chooses to reference information provided in other planning documents must identify the plan(s) being referenced, where the plan(s) are located (such as a link to a web page), and where in the plan the information being referenced may be found.

**Prompt 1:** *“A description of how and when the LEA engaged, or plans to engage, its educational partners on the use of funds provided through the Budget Act of 2021 that were not included in the 2021–22 Local Control and Accountability Plan (LCAP).”*

In general, LEAs have flexibility in deciding what funds are included in the LCAP and to what extent those funds are included. If the LEA received funding through the Budget Act of 2021 that it would have typically included within its LCAP, identify the funds provided in the Budget Act of 2021 that were not included in the LCAP and provide a description of how the LEA has engaged its educational partners on the use of funds. If an LEA included the applicable funds in its adopted 2021–22 LCAP, provide this explanation.

**Prompt 2:** *“A description of how LEA used, or plans to use, the concentration grant add-on funding it received to increase the number of staff who provide direct services to students on school campuses with an enrollment of students who are low-income, English learners, and/or foster youth that is greater than 55 percent.”*

If LEA does not receive a concentration grant or the concentration grant add-on, provide this explanation.

Describe how the LEA is using, or plans to use, the concentration grant add-on funds received consistent with California *Education Code* Section 42238.02, as amended, to increase the number of certificated staff, classified staff, or both, including custodial staff, who provide direct services to students on school campuses with greater than 55 percent unduplicated pupil enrollment, as compared to schools with an enrollment of unduplicated students that is equal to or less than 55 percent.

In the event that the additional concentration grant add-on is not sufficient to increase the number of staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, describe how the LEA 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.

**Prompt 3:** *“A description of how and when the LEA engaged its educational partners on the use of one-time federal funds received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on pupils.”*

If the LEA did not receive one-time federal funding to support recovery from the COVID-19 pandemic and the impacts of distance learning on students, provide this explanation.

Describe how and when the LEA engaged its educational partners on the use of one-time federal funds it received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on students. See the COVID-19 Relief Funding Summary Sheet web page (<https://www.cde.ca.gov/fq/cr/relieffunds.asp>) for a listing of COVID-19 relief funding and the Federal Stimulus Funding web page (<https://www.cde.ca.gov/fq/cr/>) for additional information on these funds. The LEA is not required to describe engagement that has taken place related to state funds.

**Prompt 4:** “A description of how the LEA is implementing the federal American Rescue Plan Act and federal Elementary and Secondary School Emergency Relief expenditure plan, and the successes and challenges experienced during implementation.”

If an LEA does not receive ESSER III funding, provide this explanation.

Describe the LEA’s implementation of its efforts to maintain the health and safety of students, educators, and other staff and ensure the continuity of services, as required by the federal American Rescue Plan Act of 2021, and its implementation of the federal Elementary and Secondary School Emergency Relief (ESSER) expenditure plan to date, including successes and challenges.

**Prompt 5:** “A description of how the LEA is using its fiscal resources received for the 2021–22 school year in a manner that is consistent with the applicable plans and is aligned with the LEA’s 2021–22 LCAP and Annual Update.”

Summarize how the LEA is using its fiscal resources received for the 2021–22 school year to implement the requirements of applicable plans in a manner that is aligned with the LEA’s 2021–22 LCAP. For purposes of responding to this prompt, “applicable plans” include the Safe Return to In-Person Instruction and Continuity of Services Plan and the ESSER III Expenditure Plan.

California Department of Education  
November 2021

## Supplement to the Annual Update to the 2021–22 Local Control and Accountability Plan

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
The Charter School of San Diego	Jay Garrity   Administrator of Instructional Services	Email: <a href="mailto:jgarrity@charterschool-sandiego.net">jgarrity@charterschool-sandiego.net</a> Phone: (858) 678-2020

California’s 2021–22 Budget Act, the federal American Rescue Plan Act of 2021, and other state and federal relief acts have provided local educational agencies (LEAs) with a significant increase in funding to support students, teachers, staff, and their communities in recovering from the COVID-19 pandemic and to address the impacts of distance learning on students. The following is a one-time mid-year report to the local governing board or body and educational partners related to engagement on, and implementation of, these Acts.

A description of how and when the LEA engaged, or plans to engage, its educational partners on the use of funds provided through the Budget Act of 2021 that were not included in the 2021–22 Local Control and Accountability Plan (LCAP).

The Charter School of San Diego (CSSD) will receive additional funding from the 2021-22 Budget Act by receiving funds from the California Educator Effectiveness Grant, A-G Completion Improvement Grants, Dispute Prevention Grant and Learning Recovery Grant. These grants were not included in the 2021-22 Local Control and Accountability Plan (LCAP).

The California Educator Effectiveness Grant (CEEG) is a program that promotes educator equity, quality and effectiveness through professional learning. School staff was able to design and develop a CEEG Plan by conducting a needs assessment and collaborating with educational partners, including teachers, staff, administration, students, parents and community members. The School engaged educational partners in a variety of settings and methods, including but not limited to: LCAP Surveys, School Site Council Meetings, English Language Advisory Committee Meetings, School Instructional Meetings, Leadership Team Meetings, Altus University Trainings, Open House Events and Family Learning Series. Some of the following themes emerged from each educational partner group and contributed to the development of the CEEG Plan:

- School administrators express a need for ongoing professional learning that promotes equity and inclusion for a safe school climate while also increasing student achievement related to English Language Arts and Mathematics.
- Teachers and education specialists require professional learning to gain access to more instructional tools and curriculum resources to elevate learning for specific student groups, including students with disabilities, socio-economically disadvantaged students and English learners.
- Students and parents want access to certificated staff who can support their educational, social-emotional and mental health needs.

The CEEG Plan was presented and made available to educational partners at a public meeting on December 1, 2021. The CEEG Plan was board approved on December 9, 2021.

The A-G Completion Improvement Grant Program was established for the purpose of providing additional supports to local educational agencies to help increase the number of California high school pupils, particularly low-income students, foster youth and English Learners, who graduate from high school with A-G eligibility. CSSD engaged educational partners, including teachers, staff, administrators, students, parents and community members to develop the A-G Completion Improvement Grant Plan. Meaningful feedback was collected through multiple collaborative settings and methods, including conversations, surveys, school events, meetings and trainings. Some of the most valuable feedback collected came from School Site Council Meetings conducted in January 2022. At this meeting, educational partners analyzed achievement gaps related to historical A-G completion rates, explored existing challenges, discussed potential solutions and ideal rates of growth. The following themes emerged from educational partners as new or improved programs and services the School could provide to improve A-G completion rates for All Students, but specifically underserved student groups:

- School administrators express a need for enhanced counseling services to improve the social-emotional and mental health of students – which can lead to improved academic performance and sustain a university going mindset for all students.
- Teachers and school staff want to provide additional and targeted academic tutorials for high school students that will increase engagement in the core curriculum and credit completion rates.
- Students and parents want additional informational and planning sessions focused on the benefits of completing high school with A-G eligibility.

The A-G Completion Improvement Grant Plan will be presented and made available to the school board and community for input at a regularly scheduled board meeting. After public input is taken into consideration and plan updates are made, the revised plan will be taken to the board for approval at a separate regularly scheduled board meeting prior to April 2022.

The Dispute Prevention Grant was established by Section 160 of Assembly Bill 130 and appropriated \$100,000,000 from the General Fund to the CDE, on a one-time basis, for allocation to Special Education Local Plan Areas (SELPAs). The funding is to support member local educational agencies in conducting dispute prevention and voluntary alternative dispute resolution activities to prevent and resolve special education disputes resulting from school disruptions stemming from the COVID-19 public health emergency during the period of March 13, 2020, to September 1, 2021, inclusive, in a collaborative and equitable manner.

CSSD belongs to the El Dorado County Office of Education SELPA which created a SELPA-level plan for all members. The plan includes activities focused on dispute prevention through trainings and workshops, parent outreach activities, translation of resources, parent materials, and services to encourage parent outreach activities. CSSD staff participated in a SELPA webinar held on September 9, 2021.

The Learning Recovery Grant was established by Section 161 of AB 130 (Chapter 44, Statutes of 2021) and appropriated

\$450,000,000 from the General Fund to the CDE, on a one-time basis, for allocation to Special Education Local Plan Areas (SELPA).

The funding is to provide learning recovery support. Specifically, this funding shall be expended by SELPAs and their member LEAs for purposes of providing learning recovery support to pupils with disabilities associated with impacts to learning due to school disruptions stemming from the COVID-19 public health emergency during the period of March 13, 2020, to September 1, 2021, inclusive. CSSD worked closely with SELPA program specialist to create a Learning Recovery plan.

A description of how the LEA used, or plans to use, the additional concentration grant add-on funding it received to increase the number of staff who provide direct services to students on school campuses with an enrollment of students who are low-income, English learners, and/or foster youth that is greater than 55 percent.

The Charter School of San Diego (CSSD) is a single-school Local Educational Agency (LEA) and does not have such comparison schools by which to calculate staff increases. CSSD, like many other LEAs, using the additional Concentration Grant funding to increase staffing is a challenge this year. Schools overwhelmingly report difficulty in hiring staff to fill open positions for the 2021-22 school year. However, CSSD has made every effort to recruit and hire qualified instructional staff to provide direct educational services to students, particularly the Certificated Teacher Resource (CTR) position. The main function of the CTR position is to provide academic tutoring to students in small group settings. CSSD's Human Resources Department has utilized multiple online employment platforms to display position openings and has participated in a variety of job fairs at community events and at local colleges to recruit potential instructional staff. These hiring efforts are ongoing and will continue for the remainder of the school year.

A description of how and when the LEA engaged its educational partners on the use of one-time federal funds received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on pupils.

The Charter School of San Diego (CSSD) received one-time federal funds from the Elementary and Secondary School Emergency Relief Funds (ESSER). This includes ESSER II and ESSER III funds which are intended to support recovery from the COVID-19 pandemic. From the onset of the COVID-19 emergency, CSSD deployed a Family Needs Assessment Survey to all students and parents to gather information on overall health, mental health, academic, and physical needs. School staff, including school instructional leaders, counselors, social workers, and school nurses, followed-up with each family and provided resources and support based upon specific needs. Data collected in the Family Needs Assessment Survey also aided in the development of additional services, resources and employee trainings.

To close the digital divide, CSSD deployed Chromebooks and internet data plans to families in need of home computing and internet access. CSSD commonly refers to this as the Altus Connect Program. Priority was given to Students with Disabilities to ensure access to Special Education services, and other underserved student groups to ensure equity and access to the full instructional program. CSSD staff continue to check-in with families regarding home technology needs and can issue Chromebooks and/or internet hotspots as needed on an ongoing basis. By providing students with health support/services, access to distance learning tools/technology and ongoing academic instruction, CSSD staff have been able to support each student's individual educational plan.

Students and families have been contacted directly by teachers, special education staff, counselors, and school instructional leaders in multiple formats including text messages, phone calls, emails, and virtual conferences. The school COVID-19 Safety Officer and Nurses have been available to provide support, community resources and guidance to students and parents. As school staff communicate with families, they document their conversations in the School's Student Information System (SIS). Staff use multiple collaborative settings such as Resource Center Meetings, Department Meetings, and Leadership Team Meetings to review intervention reports and discuss ongoing needs of students. While collaboration is focused on finding solutions to meet the needs of all students, there is an emphasis on reengaging and supporting the lowest-achieving students.

Students, parents, and family members have also participated in engagement events, including Virtual Parent Night, Senior Night, Family Learning Series, School Site Council, ELAC and College/Career Week. At each engagement event, educational partners share their experiences and provide input on existing programs and approaches. Educational partner feedback is collected, organized and analyzed by school leadership and aids in the development and/or adjustments of school plans, actions and services.

School employees have completed multiple surveys throughout the COVID-19 emergency, including the Employee Engagement Survey to gather information as to how the school can continue to provide a high-quality educational experience for students and families, in both virtual and in-person environments. Based upon employee feedback, the school has replaced and acquired new upgraded work tools, including Avaya Cloud and DocuSign. These new work tools ensure that all employees are equipped to do their job in an increasingly digital world while remaining compliant with Federal, State and local requirements.

Further input on the coordination and use of ESSER II funds was outlined in the School's Expanded Learning Opportunities (ELO) Grant Plan. The ELO Grant Plan was created with the focus of offering extended instructional learning time in a safe and supportive environment at our Resource Centers. It was presented, made available to the public and approved at a School Board Meeting on May 19, 2021. The ELO Grant Plan is available on the school website at <https://charterschool-sandiego.net/about/lcap/>.

An ESSER III Expenditure Plan was developed to address academic, social, emotional and mental health needs of students, as well as any opportunity gaps that existed before, and were worsened by, the COVID-19 pandemic. The ESSER III Expenditure Plan was presented, made available to educational partners and approved at the October 26, 2021 School Board Meeting. The expenditure plan is available on the school website at <https://charterschool-sandiego.net/about/public-notices/>.

A description of how the LEA is implementing the federal American Rescue Plan Act and federal Elementary and Secondary School Emergency Relief expenditure plan, and the successes and challenges experienced during implementation.

The American Rescue Plan (ARP) provided CSSD with additional Elementary and Secondary School Emergency federal relief dollars, more commonly referred to as ESSER III funds. The expenditure plan included strategies for continuous and safe in-person learning, addressing the impact of lost instructional time and other uses.

A primary focus of providing continuous and safe in-person learning was keeping our Resource Centers open and available to students and staff. CSSD was able to increase the frequency that each site is cleaned, disinfected and sanitized to help mitigate the

spread of COVID-19. Each site has a 35-point cleaning plan that includes offices, conference rooms, instructional areas, restrooms and kitchen areas. Implementing and sustaining this level of cleanliness has been a success as demonstrated by not having to close any sites since fully reopening in May 2021.

Our executive safety committee and safety ambassadors at each site have worked closely to ensure all personal protective equipment and supplies are up to date and at appropriate stock levels. Through our own purchasing practices and supplies provided by the San Diego County Office of Education (SDCOE), we have not had PPE shortages. The executive safety committee addressed air quality concerns by looking at current resources and determining if any enhancements were necessary. Maintaining our current HVAC systems and increasing filter quality to MERV 8 or higher has been recommended for each site and CSSD entered into quarterly maintenance agreements to regularly service these systems. To enhance the air quality of the HVAC system, air filters have been placed at all locations, including office spaces. These air filters scrub 700 square feet of air every 30 minutes, and each site will receive one or more filters based on their square footage. Supply was low for these items and so several purchases had to be made until we had the appropriate number of filters per site.

To address the loss of instructional time, CSSD planned to add paraprofessional staff to provide targeted Math and ELA tutorials to students failing or at risk of failing with the intention to increase student academic confidence, skills and knowledge. This action has been difficult to implement given the short supply of qualified labor and the general market of job seekers in the education industry. We have attended multiple job fairs, expanded online recruitment efforts across multiple platforms (EdJoin, LinkedIn) and dedicated human resources staff to recruit paraprofessionals. While some recruitment efforts have been successful, this remains an area of focus.

With an existing Altus Connect program that provides data-enabled Chromebooks to students, CSSD was able to quickly expand this program at the start of the Coronavirus pandemic in 2020. Our ESSER III plan includes additional Chromebooks for students who enroll and replacement of damaged technology. As we are going into our second year of the pandemic, CSSD has continued to struggle with the supply chain constraints on sourcing laptops for students. Even through strong strategic planning and close monitoring of student needs, delivery lead times continue to grow and the ability to provide units upon enrollment is a challenge.

To further reduce infections, we explored contactless enrollment options by incorporating an e-signature platform into our enrollment process with our student service center. This provides a means for our incoming students and families to effortlessly access enrollment forms on any device, including their smart phones, review the documents and provide their signature without having to deliver any documents in-person. This enrollment process improvement has been well received by our incoming students and families, which we see in their survey responses that are provided to every enrolled student. The program has been so successful that we are exploring its use for other departments.

A description of how the LEA is using its fiscal resources received for the 2021–22 school year in a manner that is consistent with the applicable plans and is aligned with the LEA’s 2021–22 LCAP and Annual Update.

CSSD has continued to responsibly utilize its fiscal resources in the 2021-22 school year to provide the necessary resources, supplies and services to our program. All employees are provided with training and updates to implement mitigation factors, like staying home when experiencing symptoms of COVID-19. CSSD recognized the need to be flexible to unplanned interruptions in our working environments, whether it be a teacher, counselor, enrollment clerk, or back-office staff. Our collaboration, knowledge and management systems allowed us to quickly evaluate the needs of our students and staff and respond appropriately. CSSD invested in technologies that allow staff to seamlessly transition their work from an office setting to their home and back again. In addition to providing the hardware necessary to enable remote work, investments in technology infrastructure have provided efficient and effective means to access instructional materials and data needed for business operations through a cloud environment.

Our health department, human resources and executive safety committee have worked closely to ensure resources for COVID testing, vaccines and PPE are given to students, families and employees. As described in the previous prompt, fiscal resources have been deployed to meet the needs identified in our Safe Return to In-Person Instruction plan, and ongoing mitigation efforts to slow/stop the spread of the coronavirus. We also provide a series of live, interactive, video broadcasts for students called Resilience in Students and Education (RISE) to ensure that mental health awareness and wellness is supported. RISE addresses students' Social and Emotional Learning impacted by COVID-19 and developmental needs such as self-awareness, self-management, social awareness, relationship, and responsibility skills.

CSSD has hired an Equity and Inclusion Officer to collaborate with instructional staff, to identify potential student needs, and coordinate services and resources to aid students and family members. A Healthy Youth Therapist was also hired to provide counseling services and facilitate student and family referrals. Most importantly, CSSD continues to be committed to providing all students with a high-quality education that meets their individual learning needs and prepares them for college/career pathways.

## Instructions for the Supplement to the Annual Update for the 2021–22 Local Control and Accountability Plan Year

*For additional questions or technical assistance related to the completion of the Supplement to the Annual Update to the 2021–22 Local Control and Accountability Plan (LCAP), 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](mailto:lcff@cde.ca.gov).*

### Introduction

California’s 2021–22 Budget Act, the federal American Rescue Plan Act of 2021, and other state and federal relief acts have provided local educational agencies (LEAs) with a significant increase in funding to support students, teachers, staff, and their communities in recovering from the COVID-19 pandemic and to address the impacts of distance learning on students. Section 124(e) of Assembly Bill 130 requires LEAs to present an update on the Annual Update to the 2021–22 LCAP and Budget Overview for Parents on or before February 28, 2022, at a regularly scheduled meeting of the governing board or body of the LEA. At this meeting, the LEA must include all of the following:

- The Supplement to the Annual Update for the 2021–22 LCAP (2021–22 Supplement);
- All available mid-year outcome data related to metrics identified in the 2021–22 LCAP; and
- Mid-year expenditure and implementation data on all actions identified in the 2021–22 LCAP.

When reporting available mid-year outcome, expenditure, and implementation data, LEAs have flexibility to provide this information as best suits the local context, provided that it is succinct and contains a level of detail that is meaningful and accessible for the LEA’s educational partners.

The 2021–22 Supplement is considered part of the 2022–23 LCAP for the purposes of adoption, review, and approval, and must be included with the LCAP as follows:

- The 2022–23 Budget Overview for Parents
- The 2021–22 Supplement
- The 2022–23 LCAP
- The Action Tables for the 2022–23 LCAP
- The Instructions for the LCAP Template

As such, the 2021–22 Supplement will be submitted for review and approval as part of the LEA’s 2022–23 LCAP.

## Instructions

Respond to the following prompts, as required. In responding to these prompts, LEAs must, to the greatest extent practicable, provide succinct responses that contain a level of detail that will be meaningful and accessible for the LEA's educational partners and the broader public and must, to the greatest extent practicable, use language that is understandable and accessible to parents.

In responding to these prompts, the LEA has flexibility to reference information provided in other planning documents. An LEA that chooses to reference information provided in other planning documents must identify the plan(s) being referenced, where the plan(s) are located (such as a link to a web page), and where in the plan the information being referenced may be found.

**Prompt 1:** *“A description of how and when the LEA engaged, or plans to engage, its educational partners on the use of funds provided through the Budget Act of 2021 that were not included in the 2021–22 Local Control and Accountability Plan (LCAP).”*

In general, LEAs have flexibility in deciding what funds are included in the LCAP and to what extent those funds are included. If the LEA received funding through the Budget Act of 2021 that it would have typically included within its LCAP, identify the funds provided in the Budget Act of 2021 that were not included in the LCAP and provide a description of how the LEA has engaged its educational partners on the use of funds. If an LEA included the applicable funds in its adopted 2021–22 LCAP, provide this explanation.

**Prompt 2:** *“A description of how LEA used, or plans to use, the concentration grant add-on funding it received to increase the number of staff who provide direct services to students on school campuses with an enrollment of students who are low-income, English learners, and/or foster youth that is greater than 55 percent.”*

If LEA does not receive a concentration grant or the concentration grant add-on, provide this explanation.

Describe how the LEA is using, or plans to use, the concentration grant add-on funds received consistent with California *Education Code* Section 42238.02, as amended, to increase the number of certificated staff, classified staff, or both, including custodial staff, who provide direct services to students on school campuses with greater than 55 percent unduplicated pupil enrollment, as compared to schools with an enrollment of unduplicated students that is equal to or less than 55 percent.

In the event that the additional concentration grant add-on is not sufficient to increase the number of staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, describe how the LEA 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.

**Prompt 3:** *“A description of how and when the LEA engaged its educational partners on the use of one-time federal funds received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on pupils.”*

If the LEA did not receive one-time federal funding to support recovery from the COVID-19 pandemic and the impacts of distance learning on students, provide this explanation.

Describe how and when the LEA engaged its educational partners on the use of one-time federal funds it received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on students. See the COVID-19 Relief Funding Summary Sheet web page (<https://www.cde.ca.gov/fg/cr/relieffunds.asp>) for a listing of COVID-19 relief funding and the Federal Stimulus Funding web page (<https://www.cde.ca.gov/fg/cr/>) for additional information on these funds. The LEA is not required to describe engagement that has taken place related to state funds.

**Prompt 4:** “A description of how the LEA is implementing the federal American Rescue Plan Act and federal Elementary and Secondary School Emergency Relief expenditure plan, and the successes and challenges experienced during implementation.”

If an LEA does not receive ESSER III funding, provide this explanation.

Describe the LEA’s implementation of its efforts to maintain the health and safety of students, educators, and other staff and ensure the continuity of services, as required by the federal American Rescue Plan Act of 2021, and its implementation of the federal Elementary and Secondary School Emergency Relief (ESSER) expenditure plan to date, including successes and challenges.

**Prompt 5:** “A description of how the LEA is using its fiscal resources received for the 2021–22 school year in a manner that is consistent with the applicable plans and is aligned with the LEA’s 2021–22 LCAP and Annual Update.”

Summarize how the LEA is using its fiscal resources received for the 2021–22 school year to implement the requirements of applicable plans in a manner that is aligned with the LEA’s 2021–22 LCAP. For purposes of responding to this prompt, “applicable plans” include the Safe Return to In-Person Instruction and Continuity of Services Plan and the ESSER III Expenditure Plan.

California Department of Education  
November 2021

**CHARTER SCHOOL UNAUDITED ACTUALS  
FINANCIAL REPORT -- ALTERNATIVE FORM**

July 1, 2020 to June 30, 2021

**Charter School Name:** Audeo Charter School  
**CDS #:** 37683383731395  
**Charter Approving Entity:** San Diego Unified School District  
**County:** San Diego  
**Charter #:** 0406

**This charter school uses the following basis of accounting:**

**(Please enter an "X" in the applicable box below; check only one box)**

- Accrual Basis** (Applicable Capital Assets/Interest on Long-Term Debt/Long-Term Liabilities/Net Position objects are 6900, 7438, 9400-9489, 9660-9669, 9796, and 9797)  
 **Modified Accrual Basis** (Applicable Capital Outlay/Debt Service/Fund Balance objects are 6100-6170, 6200-6500, 7438, 7439, and 9711-9789)

Description	Object Code	Unrestricted	Restricted	Total
<b>A. REVENUES</b>				
1. LCFF Sources				
State Aid - Current Year	8011	1,918,348.00		1,918,348.00
Education Protection Account State Aid - Current Year	8012	119,274.00		119,274.00
State Aid - Prior Years	8019	(28,584.00)		(28,584.00)
Transfers to Charter Schools in Lieu of Property Taxes	8096	4,221,644.00		4,221,644.00
Other LCFF Transfers	8091, 8097			0.00
Total, LCFF Sources		6,230,682.00	0.00	6,230,682.00
2. Federal Revenues (see NOTE in Section L)				
No Child Left Behind/Every Student Succeeds Act	8290		300,137.22	300,137.22
Special Education - Federal	8181, 8182		82,225.00	82,225.00
Child Nutrition - Federal	8220			0.00
Donated Food Commodities	8221			0.00
Other Federal Revenues	8110, 8260-8299	10,292.00	548,506.36	558,798.36
Total, Federal Revenues		10,292.00	930,868.58	941,160.58
3. Other State Revenues				
Special Education - State	StateRevSE		449,945.00	449,945.00
All Other State Revenues	StateRevAO	137,874.06	992,875.77	1,130,749.83
Total, Other State Revenues		137,874.06	1,442,820.77	1,580,694.83
4. Other Local Revenues				
All Other Local Revenues	LocalRevAO	74,055.40		74,055.40
Total, Local Revenues		74,055.40	0.00	74,055.40
5. TOTAL REVENUES				
		6,452,903.46	2,373,689.35	8,826,592.81
<b>B. EXPENDITURES (see NOTE in Section L)</b>				
1. Certificated Salaries				
Certificated Teachers' Salaries	1100	1,926,209.18	887,758.43	2,813,967.61
Certificated Pupil Support Salaries	1200	118,494.32	116,034.38	234,528.70
Certificated Supervisors' and Administrators' Salaries	1300	357,464.38	43,752.91	401,217.29
Other Certificated Salaries	1900	12,363.08	121,129.03	133,492.11
Total, Certificated Salaries		2,414,530.96	1,168,674.75	3,583,205.71
2. Noncertificated Salaries				
Noncertificated Instructional Salaries	2100			0.00
Noncertificated Support Salaries	2200	14,275.37	2,519.18	16,794.55
Noncertificated Supervisors' and Administrators' Salaries	2300	136,512.15	7,179.99	143,692.14
Clerical, Technical and Office Salaries	2400	184,216.38		184,216.38
Other Noncertificated Salaries	2900	8,051.38	2,450.42	10,501.80
Total, Noncertificated Salaries		343,055.28	12,149.59	355,204.87

**CHARTER SCHOOL UNAUDITED ACTUALS  
FINANCIAL REPORT -- ALTERNATIVE FORM**

July 1, 2020 to June 30, 2021

Charter School Name: Audeo Charter School

CDS #: 37683383731395

Description	Object Code	Unrestricted	Restricted	Total
<b>3. Employee Benefits</b>				
STRS	3101-3102	393,373.47	508,849.90	902,223.37
PERS	3201-3202	66,104.84	1,783.35	67,888.19
OASDI / Medicare / Alternative	3301-3302	58,899.45	17,796.86	76,696.31
Health and Welfare Benefits	3401-3402	653,484.37	291,279.71	944,764.08
Unemployment Insurance	3501-3502	1,400.14	593.85	1,993.99
Workers' Compensation Insurance	3601-3602	29,417.35	12,606.64	42,023.99
OPEB, Allocated	3701-3702			0.00
OPEB, Active Employees	3751-3752			0.00
Other Employee Benefits	3901-3902			0.00
Total, Employee Benefits		1,202,679.62	832,910.31	2,035,589.93
<b>4. Books and Supplies</b>				
Approved Textbooks and Core Curricula Materials	4100	22,012.40	28,716.99	50,729.39
Books and Other Reference Materials	4200	235.00	4,387.22	4,622.22
Materials and Supplies	4300	75,055.65	80,086.59	155,142.24
Noncapitalized Equipment	4400	29,164.30	27,560.45	56,724.75
Food	4700	422.14	705.79	1,127.93
Total, Books and Supplies		126,889.49	141,457.04	268,346.53
<b>5. Services and Other Operating Expenditures</b>				
Subagreements for Services	5100			0.00
Travel and Conferences	5200	23,300.49	8,847.25	32,147.74
Dues and Memberships	5300	12,662.91		12,662.91
Insurance	5400	40,817.53	206.51	41,024.04
Operations and Housekeeping Services	5500	141,589.95	64,100.28	205,690.23
Rentals, Leases, Repairs, and Noncap. Improvements	5600	424,349.33	10,458.47	434,807.80
Transfers of Direct Costs	5700-5799			0.00
Professional/Consulting Services and Operating Expend.	5800	549,884.57	406,759.59	956,644.16
Communications	5900	67,127.98	55,865.68	122,993.66
Total, Services and Other Operating Expenditures		1,259,732.76	546,237.78	1,805,970.54
<b>6. Capital Outlay</b>				
(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
Depreciation Expense (accrual basis only)	6900	414,606.95		414,606.95
Total, Capital Outlay		414,606.95	0.00	414,606.95
<b>7. Other Outgo</b>				
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	216,164.07		216,164.07
Transfers of Indirect Costs	7300-7399	(53,172.36)	53,172.36	0.00
Debt Service:				
Interest	7438	15,987.86	361.72	16,349.58
Principal (for modified accrual basis only)	7439			0.00
Total Debt Service		15,987.86	361.72	16,349.58
Total, Other Outgo		178,979.57	53,534.08	232,513.65
<b>8. TOTAL EXPENDITURES</b>		5,940,474.63	2,754,963.55	8,695,438.18

**CHARTER SCHOOL UNAUDITED ACTUALS  
FINANCIAL REPORT -- ALTERNATIVE FORM**

July 1, 2020 to June 30, 2021

Charter School Name: Audeo Charter School

CDS #: 37683383731395

Description	Object Code	Unrestricted	Restricted	Total
<b>C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)</b>		512,428.83	(381,274.20)	131,154.63
<b>D. OTHER FINANCING SOURCES / USES</b>				
1. Other Sources	8930-8979			0.00
2. Less: Other Uses	7630-7699	1,375,304.00		1,375,304.00
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999	(590,599.97)	590,599.97	0.00
4. TOTAL OTHER FINANCING SOURCES / USES		(1,965,903.97)	590,599.97	(1,375,304.00)
<b>E. NET INCREASE (DECREASE) IN FUND BALANCE /NET POSITION (C+D4)</b>		(1,453,475.14)	209,325.77	(1,244,149.37)
<b>F. FUND BALANCE / NET POSITION</b>				
1. Beginning Fund Balance/Net Position				
a. As of July 1	9791	6,921,713.37	46,684.37	6,968,397.74
b. Adjustments/Restatements	9793, 9795			0.00
c. Adjusted Beginning Fund Balance /Net Position		6,921,713.37	46,684.37	6,968,397.74
2. Ending Fund Balance /Net Position, June 30 (E+F1c)		5,468,238.23	256,010.14	5,724,248.37
<b>Components of Ending Fund Balance (Modified Accrual Basis only)</b>				
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
<b>3. Components of Ending Net Position (Accrual Basis only)</b>				
a. Net Investment in Capital Assets	9796	3,899,998.35		3,899,998.35
b. Restricted Net Position	9797		256,010.14	256,010.14
c. Unrestricted Net Position	9790A	1,568,239.88	0.00	1,568,239.88

**CHARTER SCHOOL UNAUDITED ACTUALS  
FINANCIAL REPORT -- ALTERNATIVE FORM**

July 1, 2020 to June 30, 2021

Charter School Name: Audeo Charter School

CDS #: 37683383731395

Description	Object Code	Unrestricted	Restricted	Total
<b>G. ASSETS</b>				
1. Cash				
In County Treasury	9110	1,744,628.98	551,672.85	2,296,301.83
Fair Value Adjustment to Cash in County Treasury	9111			0.00
In Banks	9120	1,671,539.10	(665,268.94)	1,006,270.16
In Revolving Fund	9130			0.00
With Fiscal Agent/Trustee	9135	25,000.00		25,000.00
Collections Awaiting Deposit	9140			0.00
2. Investments	9150			0.00
3. Accounts Receivable	9200	265,994.15		265,994.15
4. Due from Grantor Governments	9290	869,030.04	796,870.93	1,665,900.97
5. Stores	9320			0.00
6. Prepaid Expenditures (Expenses)	9330	116,211.31		116,211.31
7. Other Current Assets	9340	19,612.21		19,612.21
8. Capital Assets (accrual basis only)	9400-9489	3,899,998.35		3,899,998.35
9. TOTAL ASSETS		8,612,014.14	683,274.84	9,295,288.98
<b>H. DEFERRED OUTFLOWS OF RESOURCES</b>				
1. Deferred Outflows of Resources				
	9490			0.00
2. TOTAL DEFERRED OUTFLOWS		0.00	0.00	0.00
<b>I. LIABILITIES</b>				
1. Accounts Payable				
	9500	1,550,624.18	59,822.90	1,610,447.08
2. Due to Grantor Governments				
	9590		9,196.00	9,196.00
3. Current Loans				
	9640	978,500.67		978,500.67
4. Unearned Revenue				
	9650		358,245.80	358,245.80
5. Long-Term Liabilities (accrual basis only)				
	9660-9669	614,651.06		614,651.06
6. TOTAL LIABILITIES		3,143,775.91	427,264.70	3,571,040.61
<b>J. DEFERRED INFLOWS OF RESOURCES</b>				
1. Deferred Inflows of Resources				
	9690			0.00
2. TOTAL DEFERRED INFLOWS		0.00	0.00	0.00
<b>K. FUND BALANCE /NET POSITION</b>				
Ending Fund Balance /Net Position, June 30 (G9 + H2) - (I6 + J2) (must agree with Line F2)				
		5,468,238.23	256,010.14	5,724,248.37

**CHARTER SCHOOL UNAUDITED ACTUALS  
FINANCIAL REPORT -- ALTERNATIVE FORM  
July 1, 2020 to June 30, 2021**

Charter School Name: Audeo Charter School  
CDS #: 37683383731395

**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. <u>Elementary and Secondary School Emergency Relief III</u>	\$ 0.00	361.72	361.72
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
<b>TOTAL FEDERAL REVENUES USED FOR CAPITAL OUTLAY AND DEBT SERVICE</b>	<b>0.00</b>	<b>361.72</b>	<b>361.72</b>

**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	0.00
b. Noncertificated Salaries 2000-2999	0.00
c. Employee Benefits 3000-3999	0.00
d. Books and Supplies 4000-4999	0.00
e. Services and Other Operating Expenditures 5000-5999	0.00
<b>TOTAL COMMUNITY SERVICES EXPENDITURES</b>	<b>0.00</b>

**CHARTER SCHOOL UNAUDITED ACTUALS  
FINANCIAL REPORT -- ALTERNATIVE FORM  
July 1, 2020 to June 30, 2021**

Charter School Name: Audeo Charter School  
CDS #: 37683383731395

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**3. State and Local Expenditures to be Used for ESSA Annual Maintenance of Effort Calculation:**

Results of this calculation will be used for comparison with 2019-20 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 2022-23.

a. Total Expenditures (B8)	8,695,438.18
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]	941,160.58
c. Subtotal of State & Local Expenditures [a minus b]	7,754,277.60
d. Less Community Services [L2 Total]	0.00
e. Less Capital Outlay & Debt Service [Total B6 plus objects 7438 and 7439, less L1 Total]	430,594.81
<b>TOTAL STATE &amp; LOCAL EXPENDITURES SUBJECT TO MOE</b> [c minus d minus e]	<b>\$ 7,323,682.79</b>

**Charter School First Interim Report**

FY 2021-2022

For the Period July 1, 2021 through October 31, 2021

Accrual Basis

Financial Accounting Department

Charter Schools Accounting Office

Authorizing Agency Contact: Theresa Goody (tgoody@sandi.net)

Authorizing Agency Contact: Nadine Creer (ncreer@sandi.net)

Charter School Name:	Audeo Charter School
CDS #:	37-68338-3731395
Charter Approving Entity:	San Diego Unified School District
County:	San Diego
SBE Charter #:	58

Has board approved a revised budget? (check box below)

No.

Yes. (Enter board approved revision date below)

Revised Date: 10/26/2021

Description	Object Code	A	B	C	D	(A + C) E	(B + D) F	(E + H) G	(G - E) H
		Unrestricted Budget	Unrestricted Actuals through 10/31/21	Restricted Budget	Restricted Actuals through 10/31/21	Total Budget	Total Actuals through 10/31/21	Projected EFB/NP (Higher of Budget or Actual)	Amount over Budget
<b>A. REVENUES (8000-8799)</b>									
1. Local Control Funding Formula (LCFF) Sources - (8011-8097)									
LCFF State Aid - Current Year (CY) (Res 0000)	8011	1,549,971	396,823			1,549,971	396,823	1,549,971	-
Education Protection Account State Aid (EPA) - CY (Res 1400)	8012	88,388	18,654			88,388	18,654	88,388	-
State Aid - Prior Years (LCFF State Aid and EPA) (Res 0000 and Res 1400)	8019					-	-	-	-
Transfers to Charter Schools In Lieu of Property Taxes - CY & PY (Res 0000)	8096	3,107,267	1,090,196			3,107,267	1,090,196	3,107,267	-
Other LCFF Transfers	8091, 8097					-	-	-	-
<b>Total, LCFF Sources</b>		<b>4,745,626</b>	<b>1,505,673</b>	<b>-</b>	<b>-</b>	<b>4,745,626</b>	<b>1,505,673</b>	<b>4,745,626</b>	<b>-</b>
2. Federal Revenues (8100-8299)									
ESEA (ESSA), Title I, Part A, Basic Grants Low-Income and Neglected (Res 3010)	8290			148,293	37,073	148,293	37,073	148,293	-
ESEA (ESSA): Title II, Part A, Improving Teacher Quality Program (Res 4035)	8290			22,880	5,720	22,880	5,720	22,880	-
ESEA (ESSA): Title III, Limited English Proficient Student Program (Res 4203)	8290			6,669		6,669	-	6,669	-
ESEA (ESSA): Title III, Immigrant Education Program (Res 4201)	8290					-	-	-	-
ESEA (ESSA): Title IV, 21st Century Learning Communities (Res 4124)	8290					-	-	-	-
ESEA (ESSA): Title IV, Part A, Student Support and Academic Enrichment Grants (Res 4127)	8290			10,000	2,500	10,000	2,500	10,000	-
ESSA: Title V, Part B, Public Charter Schools Grant Program (Res 4610)	8290					-	-	-	-
Fed SpEd, IDEA Basic Local Assistance Entitlement, Part B, Sec 611 (Res 3310)	8181			94,500		94,500	-	94,500	-
Fed Sp Ed, IDEA Mental Health Allocation Plan, Part B, Sec 611 (Res 3327)	8182					-	-	-	-
Child Nutrition - Federal (NSLP) (Res 5310 and others)	8220					-	-	-	-
Maintenance and Operations (Public Law 81-874) (Res 0000)	8110	59,968	63,554			59,968	63,554	63,554	3,586
Other Federal Revenues (All other resources not reported separately)	8100-8299			373,773	9	373,773	9	373,773	-
<b>Total - Federal Revenues</b>		<b>59,968</b>	<b>63,554</b>	<b>656,115</b>	<b>45,302</b>	<b>716,083</b>	<b>108,856</b>	<b>719,669</b>	<b>3,586</b>
3. Other State Revenues (8300-8599)									
State Special Education (Res 6500)	8792			315,987	115,018	315,987	115,018	315,987	-
State Special Education Mental Health Services (Res 6512)	8590			80,000		80,000	-	80,000	-
Mandate Block Grant (Res 0000)	8550	23,720				23,720	-	23,720	-
After School Education and Safety (ASES) (Res 6010)	8677, 8590					-	-	-	-
Common Core Standards Implementation (Res 7405)	8590					-	-	-	-
Charter School Facility Grant Program (SB 740) (Res 6030)	8590					-	-	-	-
COVID-19 LEA Response Funds (SB 117) (Res 7388)	8590					-	-	-	-
Lottery, Unrestricted (Res 1100)	8560	93,433	(4,110)			93,433	(4,110)	93,433	-
Lottery, Restricted - Prop 20 (Res 6300)	8560			30,521	(3,272)	30,521	(3,272)	30,521	-
Proposition 39 - California Clean Energy Jobs Act (Res 6230)	8590					-	-	-	-
Other State Revenues (All other resources not reported separately)	8300-8599			510,757	74,505	510,757	74,505	510,757	-
<b>Total - Other State Revenues</b>		<b>117,153</b>	<b>(4,110)</b>	<b>937,265</b>	<b>186,251</b>	<b>1,054,418</b>	<b>182,141</b>	<b>1,054,418</b>	<b>-</b>
4. Local Revenue (8600-8799)									
All Local Revenues	8600-8799	34,000	14,586			34,000	14,586	34,000	-
<b>Total - Local Revenues</b>		<b>34,000</b>	<b>14,586</b>	<b>-</b>	<b>-</b>	<b>34,000</b>	<b>14,586</b>	<b>34,000</b>	<b>-</b>
<b>5. TOTAL REVENUES</b>		<b>4,956,747</b>	<b>1,579,702</b>	<b>1,593,380</b>	<b>231,553</b>	<b>6,550,127</b>	<b>1,811,256</b>	<b>6,553,713</b>	<b>3,586</b>
<b>B. EXPENDITURES AND OTHER OUTGO (1000-7499)</b>									
1. Certificated Salaries									
Teachers' Salaries	1100	1,378,232	453,068	824,612	252,868	2,202,844	705,936	2,202,844	-
Pupil Support Salaries	1200	85,074	30,326	121,441	36,865	206,515	67,191	206,515	-
Supervisors' and Administrators' Salaries	1300	289,029	93,455	15,435	5,145	304,464	98,600	304,464	-
Other Certificated Salaries	1900	26,305		85,106	13,838	111,411	13,838	111,411	-
<b>Total, Certificated Salaries</b>		<b>1,778,641</b>	<b>576,849</b>	<b>1,046,593</b>	<b>308,716</b>	<b>2,825,234</b>	<b>885,565</b>	<b>2,825,234</b>	<b>-</b>

**Charter School First Interim Report**

FY 2021-2022

For the Period July 1, 2021 through October 31, 2021

Accrual Basis

Financial Accounting Department

Charter Schools Accounting Office

Authorizing Agency Contact: Theresa Goody (tgoody@sandi.net)

Authorizing Agency Contact: Nadine Creer (ncreer@sandi.net)

Charter School Name: **Audeo Charter School**  
 CDS #: **37-68338-3731395**  
 Charter Approving Entity: **San Diego Unified School District**  
 County: **San Diego**  
 SBE Charter #: **58**

Has board approved a revised budget? (check box below)

No.

Yes. (Enter board approved revision date below)

Revised Date: **10/26/2021**

Description	Object Code	A	B	C	D	(A+C) E	(B+D) F	(E+H) G	(G-E) H
		Unrestricted Budget	Unrestricted Actuals through 10/31/21	Restricted Budget	Restricted Actuals through 10/31/21	Total Budget	Total Actuals through 10/31/21	Projected EFB/NP (Higher of Budget or Actual)	Amount over Budget
<b>2. Classified Salaries</b>									
Instructional Salaries	2100					-	-	-	-
Support Salaries	2200	15,381				15,381	-	15,381	-
Supervisors' and Administrators' Salaries	2300	77,264	26,935		725	77,264	27,660	77,264	-
Clerical and Office Salaries	2400	224,795	64,391			224,795	64,391	224,795	-
Other Classified Salaries	2900					-	-	-	-
<b>Total, Classified Salaries</b>		<b>317,440</b>	<b>91,326</b>	<b>-</b>	<b>725</b>	<b>317,440</b>	<b>92,051</b>	<b>317,440</b>	<b>-</b>
<b>3. Employee Benefits</b>									
STRS	3101-3102	303,548	97,603	177,084	52,235	480,632	149,838	480,632	-
PERS	3201-3202	69,202	20,923		166	69,202	21,089	69,202	-
OASDI/Medicare (Social Security)	3301-3302	49,960	14,975	15,290	4,559	65,250	19,534	65,250	-
Health and Welfare Benefits	3401-3402	528,967	185,625	312,652	83,298	841,619	268,923	841,619	-
Unemployment Insurance	3501-3502	7,459	3,341	8,254	1,547	15,713	4,888	15,713	-
Workers' Compensation Insurance	3601-3602	22,823	7,262	11,118	3,363	33,941	10,626	33,941	-
OPEB, Allocated	3701-3702					-	-	-	-
OPEB, Active Employees	3751-3752					-	-	-	-
Other Employee Benefits	3901-3902					-	-	-	-
<b>Total, Employee Benefits</b>		<b>981,959</b>	<b>329,729</b>	<b>524,398</b>	<b>145,169</b>	<b>1,506,357</b>	<b>474,898</b>	<b>1,506,357</b>	<b>-</b>
<b>4. Books and Supplies</b>									
Approved Textbooks and Core Curricula Materials	4100	14,322		10,000	622	24,322	622	24,322	-
Books and Other Reference Materials	4200	6,379		5,539	5,018	11,918	5,018	11,918	-
Materials and Supplies	4300	67,486	29,737	25,953	3,414	93,439	33,151	93,439	-
Non-capitalized Equipment	4400	22,109		6,950	2,059	29,059	2,059	29,059	-
Food (Food used in food-service activities for which the purpose is nutrition)	4700	1,800		3,000		4,800	-	4,800	-
<b>Total, Books and Supplies</b>		<b>112,096</b>	<b>29,737</b>	<b>51,442</b>	<b>11,113</b>	<b>163,538</b>	<b>40,850</b>	<b>163,538</b>	<b>-</b>
<b>5. Services and Other Operating Expenditures</b>									
Subagreements for Services	5100					-	-	-	-
Travel and Conferences	5200	23,619	5,702	7,988	3,419	31,607	9,121	31,607	-
Dues and Memberships	5300	13,022	9,463	150		13,172	9,463	13,172	-
Insurance	5400	33,444	28,955		60	33,444	29,015	33,444	-
Operations and Housekeeping Services	5500	120,561	34,888	102,720	36,216	223,281	71,105	223,281	-
Rentals,Leases,Repairs,and Noncapitalized Improvements	5600	232,379	62,958	12,000	3,327	244,379	66,285	244,379	-
Transfer of Direct Costs ( <b>MUST net to zero</b> )	5700					-	-	-	-
Prof/Consulting Svcs and Operating Expend ( <b>Include District Oversight</b> )	5800	485,507	158,613	526,324	112,852	1,011,831	271,465	1,011,831	-
Communications	5900	16,305	1,599	54,226	14,931	70,531	16,529	70,531	-
<b>Total, Services and Other Operating Expenditures</b>		<b>924,837</b>	<b>302,179</b>	<b>703,408</b>	<b>170,804</b>	<b>1,628,245</b>	<b>472,983</b>	<b>1,628,245</b>	<b>-</b>
<b>6. Capital Outlay</b>									
Depreciation Expense (See Sections G.9 & F.2.a)	6900	252,356	82,770			252,356	82,770	252,356	-
<b>Total, Capital Outlay</b>		<b>252,356</b>	<b>82,770</b>	<b>-</b>	<b>-</b>	<b>252,356</b>	<b>82,770</b>	<b>252,356</b>	<b>-</b>
<b>7. Other Outgo</b>									
Tuition to Other Schools ( <i>Include contribution to unfunded cost of Sp Ed.</i> )	7110-7143					-	-	-	-
Transfers of Pass-Through Revenues to Other LEAs	7211-7213					-	-	-	-
Transfers of Apportionments to Other LEAs - Spec Ed and All Others	7221-7223					-	-	-	-
All Other Transfers	7280-7299					-	-	-	-
Transfers of Indirect Costs ( <b>MUST net to zero</b> )	7300-7399	(17,324)	(5,594)	17,324	5,594	-	-	-	-
Debt Service - Interest	7430-7439	5,777	1,586			5,777	1,586	5,777	-
Debt Service - Principal (FOR MODIFIED ACCRUAL BASIS ONLY)	7439					-	-	-	-
<b>Total, Other Outgo</b>		<b>(11,547)</b>	<b>(4,008)</b>	<b>17,324</b>	<b>5,594</b>	<b>5,777</b>	<b>1,586</b>	<b>5,777</b>	<b>-</b>
<b>8. TOTAL EXPENDITURES</b>		<b>4,355,782</b>	<b>1,408,581</b>	<b>2,343,165</b>	<b>642,121</b>	<b>6,698,947</b>	<b>2,050,703</b>	<b>6,698,947</b>	<b>-</b>
<b>C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPEND. BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)</b>		<b>600,965</b>	<b>171,121</b>	<b>(749,785)</b>	<b>(410,568)</b>	<b>(148,820)</b>	<b>(239,447)</b>	<b>(145,234)</b>	

**Charter School First Interim Report**

FY 2021-2022

For the Period July 1, 2021 through October 31, 2021

Accrual Basis

Financial Accounting Department

Charter Schools Accounting Office

Authorizing Agency Contact: Theresa Goody (tgoody@sandi.net)

Authorizing Agency Contact: Nadine Creer (ncreer@sandi.net)

Charter School Name:	Audeo Charter School
CDS #:	37-68338-3731395
Charter Approving Entity:	San Diego Unified School District
County:	San Diego
SBE Charter #:	58

Has board approved a revised budget? (check box below)

No.

Yes. (Enter board approved revision date below)

Revised Date: 10/26/2021

Description	Object Code	A	B	C	D	(A+C) E	(B+D) F	(E+H) G	(G-E) H
		Unrestricted Budget	Unrestricted Actuals through 10/31/21	Restricted Budget	Restricted Actuals through 10/31/21	Total Budget	Total Actuals through 10/31/21	Projected EFB/NP (Higher of Budget or Actual)	Amount over Budget
<b>D. OTHER FINANCING SOURCES/USES (7600-7699, 8930-8999)</b>									
1. All Other Financing Sources	8930-8979	906,020	906,020			906,020	906,020	906,020	
2. Other Uses	7630-7699					-	-	-	
3. Contributions between unrestricted and restricted accounts ( <i>MUST net to zero</i> ) <i>(Include contribution to the unfunded cost of Special Education)</i>	8980-8999	(513,642)		513,642		-	-	-	
4. TOTAL OTHER FINANCING SOURCES/USES		392,378	906,020	513,642	-	906,020	906,020	906,020	
<b>E. NET INCREASE (DECREASE) IN FUND BALANCE/NET POSITION (C + D.4.)</b>									
		993,342	1,077,141	(236,142)	(410,568)	757,200	666,573	760,786	
<b>F. FUND BALANCE/NET POSITION (Budget and Actuals MUST match) (F.1.a-b)</b>									
1. Beginning Fund Balance/Net Position									
a. July 1 ( <i>MUST match EFB/Net Position of PY Unaudited Actuals, Section F.2</i> )	9791	5,468,238	5,468,238	256,010	256,010	5,724,248	5,724,248	5,724,248	
b. Adjustments/Restatements	9793, 9795	-	-	-	-	-	-	-	
c. Adjusted Beginning Fund Balance/Net Position		5,468,238	5,468,238	256,010	256,010	5,724,248	5,724,248	5,724,248	
<b>2. Projected Ending Fund Balance/Net Position, June 30 (E + F.1.c.)</b>	See cell M128	6,461,581	6,545,379	19,868	(154,558)	6,481,448	6,390,822	6,485,034	
Components of Ending Net Position									
a. Net Investment in Capital Assets ( <i>See Sections B.6 and G.9</i> )	9796		3,910,674				3,910,674		
b. Restricted Net Position	9797				(154,558)		(154,558)		
c. Unrestricted Net Position	9791		2,634,705		-		2,634,705		
<b>G. ASSETS</b>									
1. Cash									
In County Treasury	9110		1,711,154		425,101		2,136,256		
Fair Value Adjustment to Cash in County Treasury	9111						-		
In Banks	9120		1,302,979		(499,121)		803,858		
In Revolving Fund	9130						-		
With Fiscal Agent/Trustee	9135		25,000				25,000		
Collections Awaiting Deposit	9140						-		
2. Investments	9150						-		
3. Accounts Receivable	9200		19,348		5		19,353		
4. Due From Grantor Government	9290				245,170		245,170		
5. Due From Other Funds	9310						-		
6. Stores	9320						-		
7. Prepaid Expenditures (Expenses)	9330		56,890		1,296		58,187		
8. Other Current Assets	9340		6,476				6,476		
9. Capital Assets ( <i>See Sections B.6 &amp; F.2.a</i> )	9400-9489		3,910,674				3,910,674		
10. Total Assets			7,032,523		172,451		7,204,974		
<b>H. DEFERRED OUTFLOWS OF RESOURCES</b>									
1. Deferred Outflows of Resources									
2. Total Deferred Outflows	9490						-		

**Charter School First Interim Report**

FY 2021-2022

For the Period July 1, 2021 through October 31, 2021

Accrual Basis

Financial Accounting Department  
 Charter Schools Accounting Office  
 Authorizing Agency Contact: Theresa Goody (tgoody@sandi.net)  
 Authorizing Agency Contact: Nadine Creer (ncreer@sandi.net)

Charter School Name: Audeo Charter School  
 CDS #: 37-68338-3731395  
 Charter Approving Entity: San Diego Unified School District  
 County: San Diego  
 SBE Charter #: 58

Has board approved a revised budget? (check box below)

- No.
- Yes. (Enter board approved revision date below)

Revised Date: 10/26/2021

Description	Object Code	A	B	C	D	(A+C) E	(B+D) F	(E+H) G	(G-E) H
		Unrestricted Budget	Unrestricted Actuals through 10/31/21	Restricted Budget	Restricted Actuals through 10/31/21	Total Budget	Total Actuals through 10/31/21	Projected EFB/NP (Higher of Budget or Actual)	Amount over Budget
<b>I. LIABILITIES</b>									
1. Accounts Payable	9500		367,274		34,073		401,346		
2. Due to Grantor Government	9590				9,196		9,196		
3. Due to Other Funds	9610						-		
4. Current Loans	9640		28,343				28,343		
5. Deferred Revenue	9650				283,741		283,741		
6. Long-term Liabilities	9660-9669		91,527				91,527		
7. Total Liabilities			487,144		327,009		814,153		
<b>J. DEFERRED INFLOWS OF RESOURCES</b>									
1. Deferred Inflows of Resources	9690						-		
2. Total Deferred inflows of Resources			-		-		-		
<b>K. ENDING FUND BALANCE/NET POSITION, October 31, 2021</b>									
1. Ending Fund Balance/Net Position (G10+H2-I7-J2)			6,545,379		(154,558)		6,390,822		
<i>(MUST agree with F.2)</i>									



## **Assumptions for the February Revised Operational Budget FY 2021-22**

The Audeo Charter School (Audeo) is an independent study program. Audeo takes a very conservative approach in developing its financial planning.

A regular school or a comprehensive high school generates its major source of revenues from pupils' actual attendance or what is sometimes referred to as "Seat Time Attendance". As a condition of apportionment, every pupil must be scheduled to attend school for the statutory minimum days applicable to the grade level or program unless exempted.

**Apportionment credit for independent study programs, like Audeo are based on the student's "product" or academic work**, which is assessed by a competent credentialed certificated teacher. The teacher determines the time value of completed assignments or work products so that Average Daily Attendance (**ADA**) can be earned. Each student in the program is expected to work 175 instructional days per regular school year: 375 minutes per day and 65,625 minutes annually. Audeo is a year-round program and has adopted a multi-track calendar. Students may enroll and continue to earn academic credit all 12 months of the year. This design maximizes students' opportunities to catch up on their coursework.

The State of California implemented the **Local Control Funding Formula (LCFF)** in the 2013-14 school year to fund public schools, including charter schools. In the 2018-19 fiscal year, LCFF funding targets were achieved and future LCFF growth will be attributable to the application of the COLA plus augmentation to the base grant.

The LCFF formula for school districts and charter schools (LEAs) is composed of uniform base grants by grade span (K-3, 4-6, 7-8, 9-12) and includes additional funding for targeted students, as follows:

- \* **Supplemental Grant** equal to 20 percent of the adjusted base grant multiplied by ADA and the unduplicated percentage of targeted disadvantaged pupils. Targeted pupils are those classified as English Language Learners, Free and Reduced Priced Meal eligible students, foster youth, or any combination of these factors (unduplicated count). The projected unduplicated pupil percentage for Audeo is 58.25%.
- \* **Concentration Grant** equal to 65 percent of the adjusted base grant multiplied by ADA and the percentage of unduplicated pupils exceeding 55% of an LEA's enrollment. Concentration grants for charter schools are limited to the lesser of the charter school's unduplicated pupil percentage (UPP) or their local districts UPP.

As part of the LCFF, school districts, county offices of education and charter schools are required to develop and adopt a **Local Control and Accountability Plan (LCAP)** using a State Board adopted LCAP template. The LCAP can be a single-year or three-year plan, which is reviewed and updated annually. Charter schools may complete the LCAP to align with the term of the charter school’s budget, typically one year, which is submitted to the school’s authorizer. All LEAs must complete the LCAP and the Annual Update Template each year.

State regulations require that the LCAP must include annual goals in eight specified areas. These eight annual goals are in alignment with the State goals.

1. Student Achievement
2. Student Engagement
3. Other Student Outcomes
4. School Climate
5. Parental Involvement
6. Basic Services
7. Implementation of Common Core
8. Course Access

## BUDGET INFORMATION

Based on School Services of California (SSC) School District and Charter School Financial Projection Dartboard – 2022-23 Governor’s Budget and the Fiscal Crisis and Management Assistance Team (FCMAT) LCFF Calculator, the rates below were used to build Audeo ’s February Revised Operational Budget.

**Table 1:**

Description	FY 2021-22
Grades K-3 Adjusted Base Grant	\$8,935
Grades 4-6 Base Grant	\$8,215
Grades 7-8 Base Grant	\$8,458
Grades 9-12 Adjusted Base Grant	\$10,057
Statutory Cost of Living Allowance (COLA)*	5.07%
Audeo ’s Unduplicated Pupil Percentage (Rolling Average)	58.25%
District’s Unduplicated Pupil Percentage (SDUSD)	59.16%

\*Amount represents the 2021–22 statutory COLA of 1.70% plus an augmentation of 1.00%, compounded with the 2020–21 unfunded statutory COLA of 2.31%.

Revenues were calculated based on the following enrollment and ADA projections:

**Table 2:**

Description	FY 2021-22 (Estimated P-2)	FY 2020-21 (Actual P-2)	FY 2019-20 (Actual P-2)
Enrollment	442	763	564
ADA:			
Grade K-6	114.20	92.90	92.90
Grade 7-8	49.08	64.1600	64.16
Grade 9-12	256.89	439.31	439.31
<b>Total ADA</b>	<b>420.17</b>	<b>596.37</b>	<b>596.37</b>

### REVENUE PROJECTIONS

**Table 3:**

Description	FY 2021-22
LCFF Sources	\$4,532,514
Federal Revenues	\$968,376
State Revenues Other than LCFF	\$888,814
Local Revenues	\$30,000
<b>Total Projected Revenues</b>	<b>\$6,419,704</b>
Other Financing Sources	\$906,020
<b>Total Projected Revenues &amp; Other Financing Sources</b>	<b>\$7,325,724</b>

- **In Lieu of Property Taxes** of \$7,030.97 per current year (CY) P-2 ADA is based on FY 2020-21 P-2 rate for San Diego Unified School District.
- **Education Protection Account (EPA)** is now a part of the LCFF Calculation. Proposition 30, *The Schools and Local Public Safety Act of 2012*, approved by the voters on Nov. 6, 2012 and amended by Proposition 55 on November 8, 2016, brought about the creation of Education Protection Account. It was intended to minimize deeper cuts to school agencies and other state-supported programs in California. EPA is not an additional source of revenue. A corresponding reduction will be made equally to the school's general-purpose state aid funding for funds received through the EPA. The CDE will allocate EPA revenues on a quarterly basis through the 2030-31 fiscal year.
- **Lottery revenues** are allocated based on CY annual ADA adjusted by the statewide average excused absence factor of 1.04446. Since CY annual ADA is not available until after the fiscal year ends, lottery funding is initially allocated using the current year's P-2 ADA and adjusted in the subsequent fiscal year. Rates used are based on School Services of California's latest estimates: \$65 for Prop 20 (Lottery: Instructional Materials) and \$163 for Non-Prop 20 for (Lottery: Unrestricted).

- **Federal Funds**

**Titles I, II, III, and IV** are based on the latest allocation schedules provided by the California Department of Education (CDE) for FY 2021-22.

**ESSA: School Improvement (CSI) Funding for LEAs:**

Audeo was granted 2020-21 ESSA CSI funds in the amount of \$177,547. The project period for this grant began on February 15, 2021 and ends on September 30, 2022.

Audeo has projected to spend \$160,525 of its 2020-21 CSI funds for this fiscal year (FY).

**Elementary and Secondary School Emergency Relief Round III (ESSER III) Fund:**

In response to the 2019 Novel Coronavirus (COVID-19), the U.S. Congress passed American Rescue Plan (ARP) Act, which was signed into law on March 11, 2021. This federal stimulus funding is the third act of federal relief in response to COVID-19, following the Coronavirus Aid, Relief, and Economic Security (CARES) Act signed into law on March 27, 2020, and the Coronavirus Response and Relief Supplemental Appropriations Act, 2021 (CRRSA Act) signed into law on December 27, 2020. The ESSER III Fund accounts for nearly \$122 billion of funding for all states and California's allocation is \$15,068,884,546. Audeo's ESSER III allocation is estimated to be \$757,625 and of that amount it has included \$262,500 in this budget.

- **Expanded Learning Opportunity Grant** is part of AB 86, signed by Governor Newsom on March 5, 2021, and is intended to provide supplemental instruction, support for social and emotional well-being, and, to the maximum extent permissible under the guidelines of the United States Department of Agriculture, meals and snacks to specified student groups. Funds must be spent by August 31, 2022. Audeo's apportionment is \$458,570 and \$229,000 is included in the budget.
- **Special Education funds** are based on current projections of El Dorado Charter SELPA. **State revenues** are projected at \$715 per CY P-2 ADA while **Federal IDEA** revenues are projected at \$125.00 per PY California Basic Educational Data System (CBEDS) count.
- **Educator Effectiveness Block Grant** is made from the state General Fund pursuant to Section 22 of Assembly Bill (AB) 130 (Chapter 44, Statutes of 2021) as amended by Section 9 of AB 167 (Chapter 252, Statutes of 2021). One-time funding is provided to local educational agencies (LEAs) and state special schools in support of the Educator Effectiveness Block Grant funding (EEF) to provide professional learning for teachers, administrators, paraprofessionals who work with pupils, and classified staff that interact with pupils. Audeo's allocation total is \$84,698 and of that amount it has included the first 80% apportionment of \$67,758 in its budget.
- **Mandate Block Grant Funding** is allocated as a block grant to support various mandated programs. Each year, LEAs will have the option to either choose the mandate block grant funding or to submit a claim for the actual costs with the State Controllers' Office. Audeo chose to receive the block grant, which is based on PY P-2 ADA with funding rates of \$17.21 for Grades K-8 and \$47.84 for Grades 9-12

- **Career Technical Education Incentive Grant Program** was established as a state education, economic, and workforce development initiative with the goal of providing pupils in kindergarten and grades 1 to 12, inclusive, with the knowledge and skills necessary to transition to employment and postsecondary education. The purpose of this program is to encourage the development of new career technical education (CTE) programs and enhance and maintain current CTE programs during implementation of the school district and charter school LCFF. Audeo included the \$260,821 CTE grant for this fiscal year.
- **Dispute Prevention & Learning Recovery Funds** are two, one-time, funding streams provided to our Special Education Local Plan Area (SELPA) for distribution to its members. Dispute prevention funds are to fund dispute prevention and voluntary alternative dispute resolution activities aimed at preventing and resolving special education disputes resulting from school disruptions stemming from the pandemic. Learning recovery funds will fund learning recovery support to pupils associated with impacts to learning due to school disruptions stemming from the pandemic. \$13,375 of dispute prevention and \$41,598 of learning recovery funds are included in this budget.
- **Other Financing Sources** Nonprofit corporations were eligible to apply to the Paycheck Protection Program (PPP), a Small Business Administration (SBA) backed loan, during the COVID-19 crisis. Audeo applied for and received the loan in May of 2020. In July of 2021, the loan amount plus any accrued interest or fees was forgiven. This amounted to \$906,020 in forgiveness and is reflected in the budget under Other Financing Sources

#### **NUMBER OF FULL-TIME EQUIVALENT (FTE) FACULTY**

**Table 4:**

POSITIONS	OBJECT CODE	FY 21-22
Teachers (Gen. Ed, Special Ed*, Instructional Leads)	1100	21.80
Certificated Pupil Support (Counselors/Nurse/Psychologist/Social Worker/Tech Lead)	1200	2.00
Certificated Supervisor & Administrator	1300	1.80
Other Certificated Teacher Resource (CTR)	1900	7.00
Classified Supervisor & Administrator	2300	0.65
Clerical, Technical & Office Staff	2400	3.00
<b>TOTAL FTE POSITIONS BUDGETED</b>		<b>36.25</b>

- \* To ensure compliance with Special Ed regulations, FTE position for Special Ed is at one Special Ed Resource Specialist for every 28 caseload. We calculated the caseload by multiplying the total enrollment by the percentage of Special Ed population compared to total student population. For FY 2021-22, we estimated the Special Ed population at 23%. Currently, Audeo's Special Ed population is 21.7%

**EMPLOYEE BENEFITS**

Employee benefits were calculated using the following rates:

**Table 5:**

	<b>Object</b>	<b>Certificated</b>	<b>Classified</b>
STRS (Teachers Retirement)	3111-12	16.92%	
PERS (Classified Retirement)	3211-12		22.91%
OASDI (Social Security)	3311-12		6.20%
MEDICARE	3321-22	1.45%	1.45%
Health & Welfare – Self-Insured Plan <u>Monthly Rates</u>			
- Medical           \$2,100			
- Dental           \$ 120			
- Vision           \$ 27			
- Life Ins.       .000095	3401-02		
State Unemployment Insurance	3501-01	0.5%	0.5%
Worker Compensation Insurance	3601-02	1.08%	1.08%

**NUTRITION PROGRAM EXPENDITURES UNDER OBJECT CODE 4700**

Assembly Bill 1871 requires that non-classroom based (NCB) charter schools shall provide each needy pupil with one nutritionally adequate free or reduced-price meal during each school day. Audeo has expanded this requirement so that all enrolled students are able to select from nutritious items that meet the USDA's nutritious meal requirements at any time, for free, when in our resource centers.

**RESEARCH AND DEVELOPMENT EXPENDITURES UNDER OBJECT CODES 4300 AND 5200**

Audeo has allocated \$27,000 for research and development to support works directed toward innovation, introduction, and improvement necessary for the support of the school consistent with the Student Success Programs' mission and purpose.

**PROFESSIONAL/CONSULTING SERVICES AND OTHER OPERATING EXPENDITURES UNDER OBJECT CODE 5800**

The total budget amount for Object Code 5800 is \$1,046,590 representing 14.29% of the Operational Budget. Included in this object code are the district's oversight fees, marketing fees, maintenance agreements, student information systems, technology services, personnel testing, annual financial audits, student files audit, advertising, field trips, printing services, MAP assessments, Special Education Services and Support, El Dorado Charter SELPA Admin Fee, software licenses, and legal fees.

## **MARKETING**

Pursuant to Education Code Section 47605 (b)(5)(G), Audeo will provide means by which the school will achieve a racial and ethnic balance among its pupils that is reflective of the general population residing within the territorial jurisdiction of the District. The authorizing District has a broad and diverse student population. The budget for marketing will support the significant outreach efforts to ensure that the student body of Audeo reflects the diverse characteristics of the territorial jurisdiction of the authorizing District. Audeo has deployed an integrated marketing plan to support organizational growth. To reach Audeo's target audience, messaging has been tailored for the following mediums: Television, Billboards, Street Posters, Postcards, Email, Mobile, Social Media, Radio and Bus Ads. For FY 2021-22, Audeo has allocated \$73,257 for marketing expenses included in the object code 5800 and represents 1% of its total budget.

## **DISTRICT OVERSIGHT FEES**

Audeo will pay its authorizing District (San Diego Unified School District) oversight fees of **3 percent** for apportionments received from the State for LCFF Revenues. The following are revenues subject to calculation of **3 percent oversight fees**:

- Object Code 8011 – LCFF State Aid – Current Year
- Object Code 8012 - Education Protection Account (EPA) Entitlement
- Object Code 8019 - State Aid Prior Years - LCFF
- Object Code 8019 - State Aid Prior Years - EPA
- Object Code 8096 – Charter Schools Funding In Lieu of Property Taxes

Audeo has budgeted \$135,976 for FY 2021-22 for oversight fees.

## **RESERVES**

Audeo has allocated reserves of \$439,543 for FY 2021-22 representing 6% of total revenues of \$7,325,724.

## **FACILITIES**

Audeo carries contractual lease agreements ending in FY 2024 in the amount of \$201,427. Audeo has allocated reserves for this amount. Per the Reserve Policy adopted by the Board, the School shall designate a Contingency/Strategic Reserve Fund to provide a strategic reserve for the School. One of the components of the Contingency/Strategic Reserve Fund is the contractual obligation for facility leases.

# Audeo Charter School

## FEBRUARY REVISED OPERATIONAL BUDGET FY 2021-2022

### REVENUES

DESCRIPTION	Account Codes	FEBRUARY REVISED BUDGET	REVISED PRELIM BUDGET	INCREASE (DECREASE)
<b>LOCAL CONTROL FUNDING FORMULA - LCFF</b>				
LCFF State Aid	8011	\$ 1,494,277.00	\$ 1,549,971.00	\$ (55,694.00)
Education Protection Account	8012	84,034.00	88,388.00	(4,354.00)
In Lieu of Property Tax	8096	2,954,203.00	3,107,267.00	(153,064.00)
		-		-
<b>TOTAL, LCFF ENTITLEMENT</b>		<b>\$ 4,532,514.00</b>	<b>\$ 4,745,626.00</b>	<b>\$ (213,112.00)</b>
<b>FEDERAL REVENUES</b>				
Federal Impact Aid	8110	\$ 63,554.00	\$ 59,968.00	\$ 3,586.00
Federal IDEA	8181	94,500.00	94,500.00	-
ESSA: School Improvement Funding for LEAS	8290	160,525.00	111,158.00	49,367.00
Title I, Part A - Basic Grants Low-Income & Neglected	8290	144,734.00	148,293.00	(3,559.00)
Title II, Part A - Improving Teacher Quality Program	8290	23,299.00	22,880.00	419.00
Title III - Limited English Proficient Study Program	8290	6,669.00	6,669.00	-
Title IV Part A-Student Support & Academic Enrichment	8290	10,000.00	10,000.00	-
CARES ACT ESSER I	8290	9.00		9.00
CARES ACT ESSER II	8290	(319.00)		(319.00)
Elementary and Secondary School Emergency Relief Fund (ESSER III)	8290	262,500.00	262,615.00	(115.00)
Expanded Learning Opportunity (ELO) - ESSER II	8290	67,520.00		67,520.00
Expanded Learning Opportunity (ELO) - GEER II	8290	15,496.00		15,496.00
Expanded Learning Opportunity (ELO) - ESSER III	8290	44,015.00		44,015.00
ELO - ESSER III Learning Loss	8290	75,874.00		75,874.00
		-		-
<b>TOTAL, FEDERAL REVENUES</b>		<b>\$ 968,376.00</b>	<b>\$ 716,083.00</b>	<b>\$ 252,293.00</b>
<b>STATE REVENUES OTHER THAN LCFF</b>				
Mandate Block Grant	8550	\$ 14,626.00	\$ 23,720.00	\$ (9,094.00)
Lottery Unrestricted - Non Prop-20	8560	71,532.00	93,433.00	(21,901.00)
Lottery Unrestricted - Non Prop-20 PY	8560	(4,110.00)	-	(4,110.00)
Lottery Restricted - Prop 20	8560	28,525.00	30,521.00	(1,996.00)
Lottery Restricted - Prop 20 PY	8560	(3,272.00)	-	(3,272.00)
Educator Effectiveness	8590	67,758.00	-	67,758.00
CTE - Career Technical Education Incentive Grant Program	8590	260,821.00	241,512.00	19,309.00
Special Education	8792	300,422.00	315,987.00	(15,565.00)
Special Education - Mental Health Services - Level 2	8590	71,444.00	80,000.00	(8,556.00)
Dispute Prevention	8590	13,375.00	13,375.00	-
Learning Recovery Funds	8590	41,598.00	26,300.00	15,298.00
Expanded Learning Opportunity (ELO) Grant	8590	5,795.00	229,570.00	(223,775.00)
Expanded Learning Opportunity (ELO) Paraprofessional	8590	20,300.00	-	20,300.00
		-		-
<b>TOTAL, STATE REVENUES</b>		<b>\$ 888,814.00</b>	<b>\$ 1,054,418.00</b>	<b>\$ (165,604.00)</b>
<b>LOCAL REVENUES</b>				
Interest Income	8660	\$ 13,000.00	\$ 20,000.00	\$ (7,000.00)
All Other Local Revenue	8699	17,000.00	14,000.00	3,000.00
		-		-
<b>TOTAL, LOCAL REVENUES</b>		<b>\$ 30,000.00</b>	<b>\$ 34,000.00</b>	<b>\$ (4,000.00)</b>
<b>OTHER FINANCING SOURCES</b>				
Other Financing Sources	8979	\$ 906,020.00	\$ 906,020.00	\$ -
		-		-
<b>TOTAL, OTHER FINANCING SOURCES</b>		<b>\$ 906,020.00</b>	<b>\$ 906,020.00</b>	<b>\$ -</b>
<b>TOTAL, REVENUES</b>		<b>\$ 7,325,724.00</b>	<b>\$ 7,456,147.00</b>	<b>\$ (130,423.00)</b>

# Audeo Charter School

## FEBRUARY REVISED OPERATIONAL BUDGET FY 2021-2022

### EXPENDITURES

DESCRIPTION	Account Codes	FEBRUARY REVISED BUDGET	REVISED PRELIM BUDGET	INCREASE (DECREASE)
<b>CERTIFICATED SALARIES</b>				
Teachers' Salaries	1100	\$ 2,168,901.00	\$ 2,202,844.00	\$ (33,943.00)
Certificated Pupil Support Salaries	1200	225,759.00	206,515.00	19,244.00
Certificated Supervisor & Adm. Salaries	1300	306,686.00	304,464.00	2,222.00
Other Certificated Salaries	1900	153,783.00	111,411.00	42,372.00
<b>TOTAL, CERTIFICATED SALARIES</b>		<b>\$ 2,855,129.00</b>	<b>\$ 2,825,234.00</b>	<b>\$ 29,895.00</b>
<b>CLASSIFIED SALARIES</b>				
Classified Support Salaries	2200	\$ -	\$ 15,381.00	\$ (15,381.00)
Classified Supervisor and Administrator Salaries	2300	111,178.00	77,264.00	33,914.00
Clerical, Technical and Office Salaries	2400	209,030.00	224,795.00	(15,765.00)
<b>TOTAL, CLASSIFIED SALARIES</b>		<b>\$ 320,208.00</b>	<b>\$ 317,440.00</b>	<b>\$ 2,768.00</b>
<b>EMPLOYEE BENEFITS</b>				
STRS Retirement	3100	\$ 483,088.00	\$ 480,632.00	\$ 2,456.00
PERS Retirement	3200	73,360.00	69,202.00	4,158.00
Social Security/Medicare	3300	64,843.00	65,250.00	(407.00)
Health and Welfare	3400	904,922.00	841,619.00	63,303.00
Unemployment Insurance	3500	15,877.00	15,713.00	164.00
Workers Compensation	3600	34,394.00	33,941.00	453.00
<b>TOTAL EMPLOYEE BENEFITS</b>		<b>\$ 1,576,484.00</b>	<b>\$ 1,506,357.00</b>	<b>\$ 70,127.00</b>
<b>TOTAL PERSONNEL COST</b>		<b>\$ 4,751,821.00</b>	<b>\$ 4,649,031.00</b>	<b>\$ 102,790.00</b>

# Audeo Charter School

## FEBRUARY REVISED OPERATIONAL BUDGET FY 2021-2022

### EXPENDITURES

DESCRIPTION	Account Codes	FEBRUARY REVISED BUDGET	REVISED PRELIM BUDGET	INCREASE (DECREASE)
<b>BOOKS AND SUPPLIES</b>				
Textbooks	4100	\$ 27,996.00	\$ 24,322.00	\$ 3,674.00
Books other than Textbooks	4200	12,218.00	11,918.00	300.00
Instructional Materials and Supplies	4300	68,794.00	65,831.00	2,963.00
On Line Courses	4312	27,608.00	27,608.00	-
Research and Development	4313	6,750.00	-	6,750.00
Noncapitalized Equipment	4400	26,509.00	29,059.00	(2,550.00)
Food	4700	5,005.00	4,800.00	205.00
<b>TOTAL, BOOKS AND SUPPLIES</b>		<b>\$ 174,880.00</b>	<b>\$ 163,538.00</b>	<b>\$ 11,342.00</b>
<b>SERVICES, OTHER OPERATING EXPENSES</b>				
Travel and Conference	5200	\$ 31,269.00	\$ 31,607.00	\$ (338.00)
Research and Development Travel	5202	\$ 20,250.00		\$ 20,250.00
Dues and Memberships	5300	13,263.00	13,172.00	\$ 91.00
Liability Insurance	5400	33,394.00	33,444.00	\$ (50.00)
Operations and Housekeeping Services	5500	222,071.00	223,281.00	\$ (1,210.00)
Rental, Leases & Repairs	5600	262,835.00	244,379.00	\$ 18,456.00
Prof/Consulting Services/Oper. Expenses	5800	973,333.00	959,430.00	\$ 13,903.00
Marketing	5812	73,257.00	52,401.00	\$ 20,856.00
Communication	5900	72,695.00	70,531.00	\$ 2,164.00
<b>TOTAL, SERVICES AND OTHER OPERATING EXPENSES</b>		<b>\$ 1,702,367.00</b>	<b>\$ 1,628,245.00</b>	<b>\$ 74,122.00</b>
<b>CAPITAL OUTLAY</b>				
Depreciation - Building	6900	\$ 114,382.00	\$ 116,834.00	\$ (2,452.00)
Depreciation - Leasehold Improvements	6900	\$ 26,559.00	\$ 26,560.00	\$ (1.00)
Depreciation - Equipment	6900	110,395.00	108,962.00	\$ 1,433.00
<b>TOTAL, CAPITAL OUTLAY</b>		<b>\$ 251,336.00</b>	<b>\$ 252,356.00</b>	<b>\$ (1,020.00)</b>
<b>OTHER OUTGO</b>				
Debt Service Payment - Interest (Capitalized Leases)	7438	\$ 5,777.00	\$ 5,777.00	\$ -
<b>TOTAL, OTHER OUTGO</b>		<b>\$ 5,777.00</b>	<b>\$ 5,777.00</b>	<b>\$ -</b>
<b>RESERVES</b>				
Operation Reserve ( Non-Payroll Exp.)	9780	\$ 219,771.00	\$ 378,600.00	\$ (158,829.00)
Reserve for Economic Uncertainties	9789	219,772.00	378,600.00	(158,828.00)
<b>TOTAL, RESERVES</b>		<b>\$ 439,543.00</b>	<b>\$ 757,200.00</b>	<b>\$ (317,657.00)</b>
%		<b>6.00%</b>	<b>10.16%</b>	
<b>TOTAL, EXPENDITURES</b>		<b>\$ 7,325,724.00</b>	<b>\$ 7,456,147.00</b>	<b>\$ (130,423.00)</b>

**CHARTER SCHOOL UNAUDITED ACTUALS  
FINANCIAL REPORT -- ALTERNATIVE FORM**

July 1, 2020 to June 30, 2021

Charter School Name: The Charter School of San Diego  
 CDS #: 37683383730959  
 Charter Approving Entity: San Diego Unified School District  
 County: San Diego  
 Charter #: 0028

**This charter school uses the following basis of accounting:**

**(Please enter an "X" in the applicable box below; check only one box)**

- Accrual Basis** (Applicable Capital Assets/Interest on Long-Term Debt/Long-Term Liabilities/Net Position objects are 6900, 7438, 9400-9489, 9660-9669, 9796, and 9797)
- Modified Accrual Basis** (Applicable Capital Outlay/Debt Service/Fund Balance objects are 6100-6170, 6200-6500, 7438, 7439, and 9711-9789)

Description	Object Code	Unrestricted	Restricted	Total
<b>A. REVENUES</b>				
1. LCFF Sources				
State Aid - Current Year	8011	6,007,211.00		6,007,211.00
Education Protection Account State Aid - Current Year	8012	331,772.00		331,772.00
State Aid - Prior Years	8019	(79,509.00)		(79,509.00)
Transfers to Charter Schools in Lieu of Property Taxes	8096	11,742,904.00		11,742,904.00
Other LCFF Transfers	8091, 8097			0.00
Total, LCFF Sources		18,002,378.00	0.00	18,002,378.00
2. Federal Revenues (see NOTE in Section L)				
No Child Left Behind/Every Student Succeeds Act	8290		526,762.95	526,762.95
Special Education - Federal	8181, 8182		273,564.00	273,564.00
Child Nutrition - Federal	8220			0.00
Donated Food Commodities	8221			0.00
Other Federal Revenues	8110, 8260-8299	27,286.00	967,581.72	994,867.72
Total, Federal Revenues		27,286.00	1,767,908.67	1,795,194.67
3. Other State Revenues				
Special Education - State	StateRevSE		1,386,826.00	1,386,826.00
All Other State Revenues	StateRevAO	366,243.07	1,909,237.96	2,275,481.03
Total, Other State Revenues		366,243.07	3,296,063.96	3,662,307.03
4. Other Local Revenues				
All Other Local Revenues	LocalRevAO	183,753.97		183,753.97
Total, Local Revenues		183,753.97	0.00	183,753.97
5. TOTAL REVENUES				
		18,579,661.04	5,063,972.63	23,643,633.67
<b>B. EXPENDITURES (see NOTE in Section L)</b>				
1. Certificated Salaries				
Certificated Teachers' Salaries	1100	4,834,521.50	1,942,323.63	6,776,845.13
Certificated Pupil Support Salaries	1200	448,339.60	107,056.36	555,395.96
Certificated Supervisors' and Administrators' Salaries	1300	592,057.54	82,966.60	675,024.14
Other Certificated Salaries	1900	660.80	337,879.81	338,540.61
Total, Certificated Salaries		5,875,579.44	2,470,226.40	8,345,805.84
2. Noncertificated Salaries				
Noncertificated Instructional Salaries	2100	32,331.39		32,331.39
Noncertificated Support Salaries	2200	136,186.35		136,186.35
Noncertificated Supervisors' and Administrators' Salaries	2300	625,255.25		625,255.25
Clerical, Technical and Office Salaries	2400	1,031,677.07		1,031,677.07
Other Noncertificated Salaries	2900	42,007.44		42,007.44
Total, Noncertificated Salaries		1,867,457.50	0.00	1,867,457.50

**CHARTER SCHOOL UNAUDITED ACTUALS  
FINANCIAL REPORT -- ALTERNATIVE FORM**

July 1, 2020 to June 30, 2021

Charter School Name: The Charter School of San Diego

CDS #: 37683383730959

Description	Object Code	Unrestricted	Restricted	Total
<b>3. Employee Benefits</b>				
STRS	3101-3102	960,148.24	1,246,243.45	2,206,391.69
PERS	3201-3202	350,604.14		350,604.14
OASDI / Medicare / Alternative	3301-3302	208,170.00	35,960.80	244,130.80
Health and Welfare Benefits	3401-3402	1,755,201.87	573,475.29	2,328,677.16
Unemployment Insurance	3501-3502	3,861.72	1,291.67	5,153.39
Workers' Compensation Insurance	3601-3602	71,504.68	23,100.88	94,605.56
OPEB, Allocated	3701-3702			0.00
OPEB, Active Employees	3751-3752			0.00
Other Employee Benefits	3901-3902			0.00
Total, Employee Benefits		3,349,490.65	1,880,072.09	5,229,562.74
<b>4. Books and Supplies</b>				
Approved Textbooks and Core Curricula Materials	4100		42,185.25	42,185.25
Books and Other Reference Materials	4200			0.00
Materials and Supplies	4300	111,122.00	179,668.72	290,790.72
Noncapitalized Equipment	4400	19,034.65	84,800.93	103,835.58
Food	4700	61.80	920.67	982.47
Total, Books and Supplies		130,218.45	307,575.57	437,794.02
<b>5. Services and Other Operating Expenditures</b>				
Subagreements for Services	5100		112,779.80	112,779.80
Travel and Conferences	5200	59,341.61	18,598.66	77,940.27
Dues and Memberships	5300	36,751.56		36,751.56
Insurance	5400	144,481.03	882.09	145,363.12
Operations and Housekeeping Services	5500	210,305.70	195,459.12	405,764.82
Rentals, Leases, Repairs, and Noncap. Improvements	5600	1,721,413.21	51,878.17	1,773,291.38
Transfers of Direct Costs	5700-5799			0.00
Professional/Consulting Services and Operating Expend.	5800	996,272.56	1,050,394.40	2,046,666.96
Communications	5900	223,439.65	124,744.84	348,184.49
Total, Services and Other Operating Expenditures		3,392,005.32	1,554,737.08	4,946,742.40
<b>6. Capital Outlay</b>				
(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
Depreciation Expense (accrual basis only)	6900	1,036,012.81		1,036,012.81
Total, Capital Outlay		1,036,012.81	0.00	1,036,012.81
<b>7. Other Outgo</b>				
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	(28,245.61)	28,245.61	0.00
Debt Service:				
Interest	7438	50,454.91	40,802.96	91,257.87
Principal (for modified accrual basis only)	7439			0.00
Total Debt Service		50,454.91	40,802.96	91,257.87
Total, Other Outgo		22,209.30	69,048.57	91,257.87
<b>8. TOTAL EXPENDITURES</b>		15,672,973.47	6,281,659.71	21,954,633.18

**CHARTER SCHOOL UNAUDITED ACTUALS  
FINANCIAL REPORT -- ALTERNATIVE FORM**

July 1, 2020 to June 30, 2021

Charter School Name: The Charter School of San Diego

CDS #: 37683383730959

Description	Object Code	Unrestricted	Restricted	Total
<b>C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)</b>		2,906,687.57	(1,217,687.08)	1,689,000.49
<b>D. OTHER FINANCING SOURCES / USES</b>				
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	(1,756,251.63)	1,756,251.63	0.00
4. TOTAL OTHER FINANCING SOURCES / USES		(1,756,251.63)	1,756,251.63	0.00
<b>E. NET INCREASE (DECREASE) IN FUND BALANCE /NET POSITION (C+D4)</b>		1,150,435.94	538,564.55	1,689,000.49
<b>F. FUND BALANCE / NET POSITION</b>				
1. Beginning Fund Balance/Net Position				
a. As of July 1	9791	32,935,345.78	126,443.72	33,061,789.50
b. Adjustments/Restatements	9793, 9795			0.00
c. Adjusted Beginning Fund Balance /Net Position		32,935,345.78	126,443.72	33,061,789.50
2. Ending Fund Balance /Net Position, June 30 (E+F1c)		34,085,781.72	665,008.27	34,750,789.99
<b>Components of Ending Fund Balance (Modified Accrual Basis only)</b>				
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
<b>3. Components of Ending Net Position (Accrual Basis only)</b>				
a. Net Investment in Capital Assets	9796	19,456,746.57		19,456,746.57
b. Restricted Net Position	9797		665,008.27	665,008.27
c. Unrestricted Net Position	9790A	14,629,035.15	0.00	14,629,035.15

**CHARTER SCHOOL UNAUDITED ACTUALS  
FINANCIAL REPORT -- ALTERNATIVE FORM**

July 1, 2020 to June 30, 2021

Charter School Name: The Charter School of San Diego

CDS #: 37683383730959

Description	Object Code	Unrestricted	Restricted	Total
<b>G. ASSETS</b>				
1. Cash				
In County Treasury	9110	6,122,693.96	842,179.49	6,964,873.45
Fair Value Adjustment to Cash in County Treasury	9111			0.00
In Banks	9120	10,757,463.55	(1,245,298.69)	9,512,164.86
In Revolving Fund	9130			0.00
With Fiscal Agent/Trustee	9135	1,900,000.00		1,900,000.00
Collections Awaiting Deposit	9140			0.00
2. Investments	9150	103,899.78		103,899.78
3. Accounts Receivable	9200	550,725.55		550,725.55
4. Due from Grantor Governments	9290	2,698,143.90	1,321,239.12	4,019,383.02
5. Stores	9320			0.00
6. Prepaid Expenditures (Expenses)	9330	611,782.21		611,782.21
7. Other Current Assets	9340	58,771.31		58,771.31
8. Capital Assets (accrual basis only)	9400-9489	19,456,746.57		19,456,746.57
9. TOTAL ASSETS		42,260,226.83	918,119.92	43,178,346.75
<b>H. DEFERRED OUTFLOWS OF RESOURCES</b>				
1. Deferred Outflows of Resources				
	9490			0.00
2. TOTAL DEFERRED OUTFLOWS		0.00	0.00	0.00
<b>I. LIABILITIES</b>				
1. Accounts Payable				
	9500	360,350.81	52,071.90	412,422.71
2. Due to Grantor Governments				
	9590		81,413.50	81,413.50
3. Current Loans				
	9640	3,035,176.99		3,035,176.99
4. Unearned Revenue				
	9650		119,626.25	119,626.25
5. Long-Term Liabilities (accrual basis only)				
	9660-9669	4,778,917.31		4,778,917.31
6. TOTAL LIABILITIES		8,174,445.11	253,111.65	8,427,556.76
<b>J. DEFERRED INFLOWS OF RESOURCES</b>				
1. Deferred Inflows of Resources				
	9690			0.00
2. TOTAL DEFERRED INFLOWS		0.00	0.00	0.00
<b>K. FUND BALANCE /NET POSITION</b>				
Ending Fund Balance /Net Position, June 30 (G9 + H2) - (I6 + J2)				
(must agree with Line F2)				
		34,085,781.72	665,008.27	34,750,789.99

**CHARTER SCHOOL UNAUDITED ACTUALS  
FINANCIAL REPORT -- ALTERNATIVE FORM  
July 1, 2020 to June 30, 2021**

Charter School Name: The Charter School of San Diego  
CDS #: 37683383730959

**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. <u>Elementary and Secondary School Emergency Relief II (ESSER II)</u>	\$ 0.00	40,802.96	40,802.96
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
<b>TOTAL FEDERAL REVENUES USED FOR CAPITAL OUTLAY AND DEBT SERVICE</b>	<b>0.00</b>	<b>40,802.96</b>	<b>40,802.96</b>

**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	0.00
b. Noncertificated Salaries 2000-2999	0.00
c. Employee Benefits 3000-3999	0.00
d. Books and Supplies 4000-4999	0.00
e. Services and Other Operating Expenditures 5000-5999	0.00
<b>TOTAL COMMUNITY SERVICES EXPENDITURES</b>	<b>0.00</b>

**CHARTER SCHOOL UNAUDITED ACTUALS  
FINANCIAL REPORT -- ALTERNATIVE FORM  
July 1, 2020 to June 30, 2021**

Charter School Name: The Charter School of San Diego  
CDS #: 37683383730959

**3. State and Local Expenditures to be Used for ESSA Annual Maintenance of Effort Calculation:**

Results of this calculation will be used for comparison with 2019-20 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 2022-23.

a. Total Expenditures (B8)	21,954,633.18
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]	1,795,194.67
c. Subtotal of State & Local Expenditures [a minus b]	20,159,438.51
d. Less Community Services [L2 Total]	0.00
e. Less Capital Outlay & Debt Service [Total B6 plus objects 7438 and 7439, less L1 Total]	1,086,467.72
<b>TOTAL STATE &amp; LOCAL EXPENDITURES SUBJECT TO MOE</b> [c minus d minus e]	<b>\$ 19,072,970.79</b>

**Charter School First Interim Report**

FY 2021-2022

For the Period July 1, 2021 through October 31, 2021

Accrual Basis

Financial Accounting Department

Charter Schools Accounting Office

Authorizing Agency Contact: Theresa Goody (tgoody@sandi.net)

Authorizing Agency Contact: Nadine Creer (ncreer@sandi.net)

Charter School Name:	The Charter School of San Diego
CDS #:	37-68338-3730959
Charter Approving Entity:	San Diego Unified School District
County:	San Diego
SBE Charter #:	28

Has board approved a revised budget? (check box below)

No.

Yes. (Enter board approved revision date below)

Revised Date: 10/26/2021

Description	Object Code	A	B	C	D	(A + C)	(B + D)	(E + H)	(G - E)
		Unrestricted Budget	Unrestricted Actuals through 10/31/21	Restricted Budget	Restricted Actuals through 10/31/21	Total Budget	Total Actuals through 10/31/21	Projected EFB/NP (Higher of Budget or Actual)	Amount over Budget
<b>A. REVENUES (8000-8799)</b>									
1. Local Control Funding Formula (LCFF) Sources - (8011-8097)									
LCFF State Aid - Current Year (CY) (Res 0000)	8011	6,905,675	1,965,980			6,905,675	1,965,980	6,905,675	-
Education Protection Account State Aid (EPA) - CY (Res 1400)	8012	332,196	82,943			332,196	82,943	332,196	-
State Aid - Prior Years (LCFF State Aid and EPA) (Res 0000 and Res 1400)	8019					-	-	-	-
Transfers to Charter Schools In Lieu of Property Taxes - CY & PY (Res 0000)	8096	11,678,301	3,032,483			11,678,301	3,032,483	11,678,301	-
Other LCFF Transfers	8091, 8097					-	-	-	-
<b>Total, LCFF Sources</b>		<b>18,916,172</b>	<b>5,081,406</b>	<b>-</b>	<b>-</b>	<b>18,916,172</b>	<b>5,081,406</b>	<b>18,916,172</b>	<b>-</b>
2. Federal Revenues (8100-8299)									
ESEA (ESSA), Title I, Part A, Basic Grants Low-Income and Neglected (Res 3010)	8290			400,176	100,044	400,176	100,044	400,176	-
ESEA (ESSA): Title II, Part A, Improving Teacher Quality Program (Res 4035)	8290			56,681	14,170	56,681	14,170	56,681	-
ESEA (ESSA): Title III, Limited English Proficient Student Program (Res 4203)	8290			25,974	6,494	25,974	6,494	25,974	-
ESEA (ESSA): Title III, Immigrant Education Program (Res 4201)	8290					-	-	-	-
ESEA (ESSA): Title IV, 21st Century Learning Communities (Res 4124)	8290					-	-	-	-
ESEA (ESSA): Title IV, Part A, Student Support and Academic Enrichment Grants (Res 4127)	8290			26,682	6,671	26,682	6,671	26,682	-
ESSA: Title V, Part B, Public Charter Schools Grant Program (Res 4610)	8290					-	-	-	-
Fed SpEd, IDEA Basic Local Assistance Entitlement, Part B, Sec 611 (Res 3310)	8181			215,250		215,250	-	215,250	-
Fed Sp Ed, IDEA Mental Health Allocation Plan, Part B, Sec 611 (Res 3327)	8182			118,558		118,558	-	118,558	-
Child Nutrition - Federal (NSLP) (Res 5310 and others)	8220					-	-	-	-
Maintenance and Operations (Public Law 81-874) (Res 0000)	8110					-	-	-	-
Other Federal Revenues (All other resources not reported separately)	8100-8299			1,301,714	210,485	1,301,714	210,485	1,301,714	-
<b>Total - Federal Revenues</b>		<b>-</b>	<b>-</b>	<b>2,145,035</b>	<b>337,864</b>	<b>2,145,035</b>	<b>337,864</b>	<b>2,145,035</b>	<b>-</b>
3. Other State Revenues (8300-8599)									
State Special Education (Res 6500)	8792			1,187,601	320,332	1,187,601	320,332	1,187,601	-
State Special Education Mental Health Services (Res 6512)	8590			346,793		346,793	-	346,793	-
Mandate Block Grant (Res 0000)	8550	72,860				72,860	-	72,860	-
After School Education and Safety (ASES) (Res 6010)	8677, 8590					-	-	-	-
Common Core Standards Implementation (Res 7405)	8590					-	-	-	-
Charter School Facility Grant Program (SB 740) (Res 6030)	8590					-	-	-	-
COVID-19 LEA Response Funds (SB 117) (Res 7388)	8590					-	-	-	-
Lottery, Unrestricted (Res 1100)	8560	259,950	(5,968)			259,950	(5,968)	259,950	-
Lottery, Restricted - Prop 20 (Res 6300)	8560			84,917	(4,135)	84,917	(4,135)	84,917	-
Proposition 39 - California Clean Energy Jobs Act (Res 6230)	8590					-	-	-	-
Other State Revenues (All other resources not reported separately)	8300-8599			1,111,123	109,977	1,111,123	109,977	1,111,123	-
<b>Total - Other State Revenues</b>		<b>332,810</b>	<b>(5,968)</b>	<b>2,730,434</b>	<b>426,174</b>	<b>3,063,244</b>	<b>420,207</b>	<b>3,063,244</b>	<b>-</b>
4. Local Revenue (8600-8799)									
All Local Revenues	8600-8799	218,832	60,936			218,832	60,936	218,832	-
<b>Total - Local Revenues</b>		<b>218,832</b>	<b>60,936</b>	<b>-</b>	<b>-</b>	<b>218,832</b>	<b>60,936</b>	<b>218,832</b>	<b>-</b>
<b>5. TOTAL REVENUES</b>		<b>19,467,814</b>	<b>5,136,374</b>	<b>4,875,469</b>	<b>764,038</b>	<b>24,343,283</b>	<b>5,900,412</b>	<b>24,343,283</b>	<b>-</b>
<b>B. EXPENDITURES AND OTHER OUTGO (1000-7499)</b>									
1. Certificated Salaries									
Teachers' Salaries	1100	4,138,405	1,383,090	2,913,762	813,725	7,052,167	2,196,816	7,052,167	-
Pupil Support Salaries	1200	407,248	128,047	153,306	49,140	560,554	177,187	560,554	-
Supervisors' and Administrators' Salaries	1300	672,757	208,736	107,237	34,270	779,994	243,006	779,994	-
Other Certificated Salaries	1900	102,874		364,889	104,653	467,763	104,653	467,763	-
<b>Total, Certificated Salaries</b>		<b>5,321,284</b>	<b>1,719,873</b>	<b>3,539,194</b>	<b>1,001,788</b>	<b>8,860,478</b>	<b>2,721,662</b>	<b>8,860,478</b>	<b>-</b>

**Charter School First Interim Report**

FY 2021-2022

For the Period July 1, 2021 through October 31, 2021

Accrual Basis

Financial Accounting Department

Charter Schools Accounting Office

Authorizing Agency Contact: Theresa Goody (tgoody@sandi.net)

Authorizing Agency Contact: Nadine Creer (ncreer@sandi.net)

Charter School Name:	The Charter School of San Diego
CDS #:	37-68338-3730959
Charter Approving Entity:	San Diego Unified School District
County:	San Diego
SBE Charter #:	28

Has board approved a revised budget? (check box below)

No.

Yes. (Enter board approved revision date below)

Revised Date: 10/26/2021

Description	Object Code	A	B	C	D	(A + C)	(B + D)	(E + H)	(G - E)
		Unrestricted Budget	Unrestricted Actuals through 10/31/21	Restricted Budget	Restricted Actuals through 10/31/21	Total Budget	Total Actuals through 10/31/21	Projected EFB/NP (Higher of Budget or Actual)	Amount over Budget
<b>2. Classified Salaries</b>									
Instructional Salaries	2100					-	-	-	-
Support Salaries	2200	87,657	20,265			87,657	20,265	87,657	-
Supervisors' and Administrators' Salaries	2300	707,382	217,678			707,382	217,678	707,382	-
Clerical and Office Salaries	2400	1,226,425	375,516			1,226,425	375,516	1,226,425	-
Other Classified Salaries	2900	55,975	17,503			55,975	17,503	55,975	-
<b>Total, Classified Salaries</b>		<b>2,077,439</b>	<b>630,962</b>	<b>-</b>	<b>-</b>	<b>2,077,439</b>	<b>630,962</b>	<b>2,077,439</b>	<b>-</b>
<b>3. Employee Benefits</b>									
STRS	3101-3102	935,019	302,111	598,832	169,502	1,533,851	471,613	1,533,851	-
PERS	3201-3202	429,014	129,513			429,014	129,513	429,014	-
OASDI/Medicare (Social Security)	3301-3302	221,333	64,641	51,462	14,564	272,795	79,205	272,795	-
Health and Welfare Benefits	3401-3402	2,032,214	643,181	975,023	280,692	3,007,237	923,873	3,007,237	-
Unemployment Insurance	3501-3502	36,994	11,754	17,696	5,009	54,690	16,763	54,690	-
Workers' Compensation Insurance	3601-3602	69,150	21,976	33,098	9,370	102,248	31,346	102,248	-
OPEB, Allocated	3701-3702					-	-	-	-
OPEB, Active Employees	3751-3752					-	-	-	-
Other Employee Benefits	3901-3902					-	-	-	-
<b>Total, Employee Benefits</b>		<b>3,723,724</b>	<b>1,173,176</b>	<b>1,676,111</b>	<b>479,137</b>	<b>5,399,835</b>	<b>1,652,313</b>	<b>5,399,835</b>	<b>-</b>
<b>4. Books and Supplies</b>									
Approved Textbooks and Core Curricula Materials	4100			52,800	24,990	52,800	24,990	52,800	-
Books and Other Reference Materials	4200	3,323		2,137	1,824	5,460	1,824	5,460	-
Materials and Supplies	4300	330,477	147,201	102,842	22,052	433,319	169,252	433,319	-
Non-capitalized Equipment	4400	114,194		5,547	5,534	119,741	5,534	119,741	-
Food (Food used in food-service activities for which the purpose is nutrition)	4700	6,794		4,006	2,176	10,800	2,176	10,800	-
<b>Total, Books and Supplies</b>		<b>454,788</b>	<b>147,201</b>	<b>167,332</b>	<b>56,576</b>	<b>622,120</b>	<b>203,777</b>	<b>622,120</b>	<b>-</b>
<b>5. Services and Other Operating Expenditures</b>									
Subagreements for Services	5100					-	-	-	-
Travel and Conferences	5200	67,249	17,154	24,334	9,250	91,583	26,404	91,583	-
Dues and Memberships	5300	42,590	27,176			42,590	27,176	42,590	-
Insurance	5400	170,085	155,783	1,000	301	171,085	156,085	171,085	-
Operations and Housekeeping Services	5500	293,560	106,222	254,650	115,694	548,210	221,915	548,210	-
Rentals,Leases,Repairs,and Noncapitalized Improvements	5600	1,906,523	699,622	28,430	16,880	1,934,953	716,502	1,934,953	-
Transfer of Direct Costs (MUST net to zero)	5700					-	-	-	-
Prof/Consulting Svcs and Operating Expend (Include District Oversight)	5800	1,132,343	461,143	1,435,633	294,664	2,567,976	755,807	2,567,976	-
Communications	5900	216,976	56,177	171,227	40,585	388,203	96,761	388,203	-
<b>Total, Services and Other Operating Expenditures</b>		<b>3,829,326</b>	<b>1,523,276</b>	<b>1,915,274</b>	<b>477,375</b>	<b>5,744,600</b>	<b>2,000,651</b>	<b>5,744,600</b>	<b>-</b>
<b>6. Capital Outlay</b>									
Depreciation Expense (See Sections G.9 & F.2.a)	6900	1,126,040	352,718			1,126,040	352,718	1,126,040	-
<b>Total, Capital Outlay</b>		<b>1,126,040</b>	<b>352,718</b>	<b>-</b>	<b>-</b>	<b>1,126,040</b>	<b>352,718</b>	<b>1,126,040</b>	<b>-</b>
<b>7. Other Outgo</b>									
Tuition to Other Schools (Include contribution to unfunded cost of Sp Ed.)	7110-7143					-	-	-	-
Transfers of Pass-Through Revenues to Other LEAs	7211-7213					-	-	-	-
Transfers of Apportionments to Other LEAs - Spec Ed and All Others	7221-7223					-	-	-	-
All Other Transfers	7280-7299					-	-	-	-
Transfers of Indirect Costs (MUST net to zero)	7300-7399	(31,310)	(1,442)	31,310	1,442	-	-	-	-
Debt Service - Interest	7430-7439	25,905	12,905			25,905	12,905	25,905	-
Debt Service - Principal (FOR MODIFIED ACCRUAL BASIS ONLY)	7439					-	-	-	-
<b>Total, Other Outgo</b>		<b>(5,405)</b>	<b>11,463</b>	<b>31,310</b>	<b>1,442</b>	<b>25,905</b>	<b>12,905</b>	<b>25,905</b>	<b>-</b>
<b>8. TOTAL EXPENDITURES</b>		<b>16,527,196</b>	<b>5,558,669</b>	<b>7,329,221</b>	<b>2,016,318</b>	<b>23,856,417</b>	<b>7,574,987</b>	<b>23,856,417</b>	<b>-</b>
<b>C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPEND. BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)</b>		<b>2,940,618</b>	<b>(422,295)</b>	<b>(2,453,752)</b>	<b>(1,252,280)</b>	<b>486,866</b>	<b>(1,674,575)</b>	<b>486,866</b>	<b>-</b>

**Charter School First Interim Report**

FY 2021-2022

For the Period July 1, 2021 through October 31, 2021

Accrual Basis

Financial Accounting Department

Charter Schools Accounting Office

Authorizing Agency Contact: Theresa Goody (tgoody@sandi.net)

Authorizing Agency Contact: Nadine Creer (ncreer@sandi.net)

Charter School Name:	The Charter School of San Diego
CDS #:	37-68338-3730959
Charter Approving Entity:	San Diego Unified School District
County:	San Diego
SBE Charter #:	28

Has board approved a revised budget? (check box below)

No.

Yes. (Enter board approved revision date below)

Revised Date: 10/26/2021

Description	Object Code	A	B	C	D	(A+C) E	(B+D) F	(E+H) G	(G-E) H
		Unrestricted Budget	Unrestricted Actuals through 10/31/21	Restricted Budget	Restricted Actuals through 10/31/21	Total Budget	Total Actuals through 10/31/21	Projected EFB/NP (Higher of Budget or Actual)	Amount over Budget
<b>D. OTHER FINANCING SOURCES/USES (7600-7699, 8930-8999)</b>									
1. All Other Financing Sources	8930-8979	2,951,172	2,951,172			2,951,172	2,951,172	2,951,172	
2. Other Uses	7630-7699					-	-	-	
3. Contributions between unrestricted and restricted accounts ( <i>MUST net to zero</i> ) <i>(Include contribution to the unfunded cost of Special Education)</i>	8980-8999	(1,788,744)		1,788,744		-	-	-	
4. TOTAL OTHER FINANCING SOURCES/USES		1,162,428	2,951,172	1,788,744	-	2,951,172	2,951,172	2,951,172	
<b>E. NET INCREASE (DECREASE) IN FUND BALANCE/NET POSITION (C + D.4.)</b>									
		4,103,046	2,528,877	(665,008)	(1,252,280)	3,438,038	1,276,598	3,438,038	
<b>F. FUND BALANCE/NET POSITION (Budget and Actuals MUST match) (F.1.a-b)</b>									
1. Beginning Fund Balance/Net Position									
a. July 1 ( <i>MUST match EFB/Net Position of PY Unaudited Actuals, Section F.2</i> )	9791	34,085,782	34,085,782	665,008	665,008	34,750,790	34,750,790	34,750,790	
b. Adjustments/Restatements	9793, 9795	-	-	-	-	-	-	-	
c. Adjusted Beginning Fund Balance/Net Position		34,085,782	34,085,782	665,008	665,008	34,750,790	34,750,790	34,750,790	
<b>2. Projected Ending Fund Balance/Net Position, June 30 (E + F.1.c.)</b>	See cell M128	38,188,828	36,614,659	0	(587,272)	38,188,828	36,027,388	38,188,828	
Components of Ending Net Position									
a. Net Investment in Capital Assets ( <i>See Sections B.6 and G.9</i> )	9796		19,112,764				19,112,764		
b. Restricted Net Position	9797				(587,272)		(587,272)		
c. Unrestricted Net Position	9791		17,501,895		-		17,501,895		
<b>G. ASSETS</b>									
1. Cash									
In County Treasury	9110		7,643,750		720,230		8,363,980		
Fair Value Adjustment to Cash in County Treasury	9111						-		
In Banks	9120		8,465,690		(1,358,896)		7,106,794		
In Revolving Fund	9130						-		
With Fiscal Agent/Trustee	9135		1,900,000				1,900,000		
Collections Awaiting Deposit	9140						-		
2. Investments	9150		104,005				104,005		
3. Accounts Receivable	9200		231				231		
4. Due From Grantor Government	9290				206,056		206,056		
5. Due From Other Funds	9310						-		
6. Stores	9320						-		
7. Prepaid Expenditures (Expenses)	9330		288,899				288,899		
8. Other Current Assets	9340		58,882				58,882		
9. Capital Assets ( <i>See Sections B.6 &amp; F.2.a</i> )	9400-9489		19,112,764				19,112,764		
10. Total Assets			37,574,221		(432,609)		37,141,612		
<b>H. DEFERRED OUTFLOWS OF RESOURCES</b>									
1. Deferred Outflows of Resources									
2. Total Deferred Outflows	9490		-		-		-		

**Charter School First Interim Report**

FY 2021-2022

For the Period July 1, 2021 through October 31, 2021

Accrual Basis

Financial Accounting Department

Charter Schools Accounting Office

Authorizing Agency Contact: Theresa Goody (tgoody@sandi.net)

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Description	Object Code	A	B	C	D	(A+C) E	(B+D) F	(E+H) G	(G-E) H
		Unrestricted Budget	Unrestricted Actuals through 10/31/21	Restricted Budget	Restricted Actuals through 10/31/21	Total Budget	Total Actuals through 10/31/21	Projected EFB/NP (Higher of Budget or Actual)	Amount over Budget
<b>I. LIABILITIES</b>									
1. Accounts Payable	9500		267,586		73,249		340,834		
2. Due to Grantor Government	9590				81,414		81,414		
3. Due to Other Funds	9610						-		
4. Current Loans	9640		89,403				89,403		
5. Deferred Revenue	9650						-		
6. Long-term Liabilities	9660-9669		602,573				602,573		
7. Total Liabilities			959,562		154,662		1,114,224		
<b>J. DEFERRED INFLOWS OF RESOURCES</b>									
1. Deferred Inflows of Resources	9690						-		
2. Total Deferred inflows of Resources			-		-		-		
<b>K. ENDING FUND BALANCE/NET POSITION, October 31, 2021</b>									
1. Ending Fund Balance/Net Position (G10+H2-I7-J2)			36,614,659		(587,272)		36,027,388		
<i>(MUST agree with F.2)</i>									

# The Charter School of SAN DIEGO

## Assumptions for February Revised Operational Budget FY 2021-22

The Charter School of San Diego (CSSD) is an independent study program. CSSD takes a very conservative approach in developing its financial planning.

A regular school or a comprehensive high school generates its major source of revenues from pupils' actual attendance or what is sometimes referred to as "Seat Time Attendance". As a condition of apportionment, every pupil must be scheduled to attend school for the statutory minimum days applicable to the grade level or program unless exempted.

**Apportionment credit for independent study programs, like CSSD, are based on the student's "product" or academic work**, which is assessed by a competent credentialed certificated teacher. The teacher determines the time value of completed assignments or work products so that Average Daily Attendance (ADA) can be earned. Each student in the program is expected to work 175 instructional days per regular school year: 375 minutes per day and 65,625 minutes annually. CSSD is a year-round program and has adopted a multi-track calendar. Students may enroll and continue to earn academic credit all 12 months of the year. This design maximizes students' opportunities to catch up on their coursework.

The State of California implemented the **Local Control Funding Formula (LCFF)** in the 2013-14 school year to fund public schools, including charter schools. In the 2018-19 fiscal year, LCFF funding targets were achieved and future LCFF growth will be attributable to the application of the COLA plus augmentation to the base grant.

The LCFF formula for school districts and charter schools (LEAs) is composed of uniform base grants by grade span (K-3, 4-6, 7-8, 9-12) and includes additional funding for targeted students, as follows:

- \* **Supplemental Grant** equal to 20 percent of the adjusted base grant multiplied by ADA and the unduplicated percentage of targeted disadvantaged pupils. Targeted pupils are those classified as English Language Learners, Free and Reduced Priced Meal eligible students, foster youth, or any combination of these factors (unduplicated count). The projected unduplicated pupil percentage for CSSD is 68.64%.
  
- \* **Concentration Grant** equal to 65 percent of the adjusted base grant multiplied by ADA and the percentage of unduplicated pupils exceeding 55% of an LEA's enrollment. Concentration grants for charter schools are limited to the lesser of the charter school's unduplicated pupil percentage (UPP) or their local district's UPP.

As part of the LCFF, school districts, county offices of education and charter schools are required to develop and adopt a **Local Control and Accountability Plan (LCAP)** using a State Board adopted LCAP template. The LCAP can be a single-year or three-year plan, which is reviewed and updated annually. Charter schools may complete the LCAP to align with the term of the charter school’s budget, typically one year, which is submitted to the school’s authorizer. All LEAs must complete the LCAP and the Annual Update Template each year.

State regulations require that the LCAP must include annual goals in eight specified areas. These eight annual goals are in alignment with the State goals.

1. Student Achievement
2. Student Engagement
3. Other Student Outcomes
4. School Climate
5. Parental Involvement
6. Basic Services
7. Implementation of Common Core
8. Course Access

## BUDGET INFORMATION

Based on School Services of California (SSC) School District and Charter School Financial Projection Dartboard - 2022-23 Governor’s Budget and the Fiscal Crisis and Management Assistance Team (FCMAT) LCFF Calculator, the rates below were used to build CSSD’s February Revised Operational Budget.

**Table 1:**

Description	FY 2021-22
Grades 4-6 Adjusted Base Grant	\$8,215
Grades 7-8 Adjusted Base Grant	\$8,458
Grades 9-12 Adjusted Base Grant	\$10,057
Statutory Cost of Living Allowance (COLA)*	5.07%
CSSD’s Unduplicated Pupil Percentage (Rolling Average)	68.64%
District’s Unduplicated Pupil Percentage (SDUSD)	59.16%

*\*Amount represents the 2021–22 statutory COLA of 1.70% plus an augmentation of 1.00%, compounded with the 2020–21 unfunded statutory COLA of 2.31%.*

Revenues were calculated based on the following enrollment and ADA projections:

**Table 2:**

Description	FY 2021-22 (Estimated P-2)	FY 2020-21 (Actual P-2)	FY 2019-20 (Actual P-2)
Enrollment	1,707	1,895	1,456
ADA:			
Grade 4-6	59.03	37.54	37.54
Grade 7-8	211.98	174.68	174.68
Grade 9-12	1,350.84	1,446.64	1,446.64
<b>Total ADA</b>	<b>1,621.85</b>	<b>1,658.86</b>	<b>1,658.86</b>

### REVENUE PROJECTIONS

**Table 3:**

Description	FY 2021-22
LCFF Sources	\$18,469,906
Federal Revenues	2,790,568
State Revenues Other than LCFF	2,698,222
Local Revenues	195,941
<b>Total Projected Revenues</b>	<b>\$24,154,637</b>
Other Financing Sources	2,951,172
<b>Total Projected Revenues and Other Financing Sources</b>	<b>\$27,105,809</b>

- **In Lieu of Property Taxes** of \$7,030.97 per current year (CY) P-2 ADA is based on FY 2020-21 P-2 rate for San Diego Unified School District.
- **Education Protection Account (EPA)** is now a part of the LCFF Calculation. Proposition 30, *The Schools and Local Public Safety Act of 2012*, approved by the voters on Nov. 6, 2012, and amended by Proposition 55 on November 8, 2016, brought about the creation of Education Protection Account. It was intended to minimize deeper cuts to school agencies and other state-supported programs in California. EPA is not an additional source of revenue. A corresponding reduction will be made equally to the school's general-purpose state aid funding for funds received through the EPA. The CDE will allocate EPA revenues on a quarterly basis through the 2030-31 fiscal year.
- **Lottery revenues** are allocated based on CY annual ADA adjusted by the statewide average excused absence factor of 1.04446. Since CY annual ADA is not available until after the fiscal year ends, lottery funding is initially allocated using the prior year's Annual ADA and adjusted in the subsequent fiscal year. Rates used are based on School Services of California's latest estimates: \$65 for Prop 20 (Lottery: Instructional Materials) and \$163 for Non-Prop 20 for (Lottery: Unrestricted).

- **Federal Funds**

**Titles I, II, III, and IV** are based on the latest allocation schedules provided by the California Department of Education (CDE) for FY 2021-22.

**ESSA: School Improvement (CSI) Funding for LEAs:**

CSSD's allocation amount for 2020-21 CSI funds is \$177,547. The project period for this grant began on February 15, 2021 and ends on September 30, 2022. CSSD spent \$34,738 of its 2020-21 CSI funds in FY 2020-21 and the remaining balance of \$142,809 is projected to be spent this FY.

**Elementary and Secondary School Emergency Relief Round II (ESSER II) Fund:**

On December 27, 2020, the Coronavirus Response and Relief Supplemental Appropriations (CRRSA) Act was enacted which included a second round of Elementary and Secondary School Emergency Relief (ESSER), referenced as ESSER II. The state of California is mandated to distribute a minimum of 90% of these funds to local educational agencies (LEAs) by following Title I, Part A allocation schedule, similar to how the first ESSER funds were distributed. CSSD's revised ESSER II allocation amount is \$1,209,235 and of this amount, \$540,438 was spent in FY 2020-21 and the remaining balance of \$668,797 is projected to be spent in FY 2021-22.

**Elementary and Secondary School Emergency Relief Round III (ESSER III) Fund:**

In response to the 2019 Novel Coronavirus (COVID-19), the U.S. Congress passed American Rescue Plan (ARP) Act, which was signed into law on March 11, 2021. This federal stimulus funding is the third act of federal relief in response to COVID-19, following the Coronavirus Aid, Relief, and Economic Security (CARES) Act signed into law on March 27, 2020, and the Coronavirus Response and Relief Supplemental Appropriations Act, 2021 (CRRSA Act) signed into law on December 27, 2020. The ESSER III Fund accounts for nearly \$122 billion of funding for all states and California's allocation is \$15,068,884,546. Funds can be spent through September 30, 2024. CSSD's total revised ESSER III allocation amount is \$2,717,718 and of this amount it has included \$627,489 in this budget.

- **Expanded Learning Opportunities (ELO) Grant** is part of AB 86, signed by Governor Newsom on March 5, 2021, and is intended to provide supplemental instruction, support for social and emotional well-being, and, to the maximum extent permissible under the guidelines of the United States Department of Agriculture, meals and snacks to specified student groups. CSSD's revised allocation amount is \$1,343,828 and of this amount, \$667,849 was received in FY 20-21 and the remaining balance of \$675,979 is included in this budget.
- **Special Education funds** are based on current projections of El Dorado Charter SELPA. **State revenues** are projected at \$715 per CY P-2 ADA while **Federal IDEA** revenues are projected at \$125 per PY California Basic Educational Data System (CBEDS) count.

- **Mandate Block Grant Funding** is allocated as a block grant to support various mandated programs. Each year, LEAs will have the option to either choose the mandate block grant funding or to submit a claim for the actual costs with the State Controllers' Office. CSSD chose to receive the block grant, which is based on PY P-2 ADA with funding rates of \$17.21 for Grades K-8 and \$47.84 for Grades 9-12.
- **Career Technical Education Incentive Grant Program** was established as a state education, economic, and workforce development initiative with the goal of providing pupils in kindergarten and grades 1 to 12, inclusive, with the knowledge and skills necessary to transition to employment and postsecondary education. The purpose of this program is to encourage the development of new career technical education (CTE) programs and enhance and maintain current CTE programs during implementation of the school district and charter school LCFF. CTE funding was increased at the state level from \$150M to \$300M in 2021-22. CSSD included the \$354,371 CTE grant for this fiscal year.
- **Dispute Prevention & Learning Recovery Funds** are two, one-time, funding streams provided to our Special Education Local Plan Area (SELPA) for distribution to its members. Dispute prevention funds are to fund dispute prevention and voluntary alternative dispute resolution activities aimed at preventing and resolving special education disputes resulting from school disruptions stemming from the pandemic. Learning recovery funds will fund learning recovery support to pupils associated with impacts to learning due to school disruptions stemming from the pandemic. \$40,959 of dispute prevention and \$39,814 of learning recovery funds are included in this budget.
- **Educator Effectiveness Block Grant** is made from the state General Fund pursuant to Section 22 of Assembly Bill (AB) 130 (Chapter 44, Statutes of 2021) as amended by Section 9 of AB 167 (Chapter 252, Statutes of 2021). One-time funding is provided to local educational agencies (LEAs) and state special schools in support of the Educator Effectiveness Block Grant funding (EEF) to provide professional learning for teachers, administrators, paraprofessionals who work with pupils, and classified staff that interact with pupils. CSSD's allocation total is \$284,509 and of that amount it has included the first 80% apportionment of \$227,607 in its budget.
- **Other Financing Sources:** Nonprofit corporations were eligible to apply to the Paycheck Protection Program (PPP), a Small Business Administration (SBA) backed loan, during the COVID-19 crisis. CSSD applied for and received the loan in May of 2020. In July of 2021, the loan amount plus any accrued interest or fees was forgiven. This amounted to \$2,951,172 in forgiveness and is reflected in the budget under Other Financing Sources.

**NUMBER OF FULL-TIME EQUIVALENT (FTE) FACULTY****Table 4:**

POSITIONS	OBJECT CODE	FY 21-22
Teachers (Gen. Ed, Special Ed*, Instructional Leads)	1100	73.50
Certificated Pupil Support (Counselors/Nurse/Psychologist/Tech Lead)	1200	4.70
Certificated Supervisor & Administrator	1300	3.90
Other Certificated Teacher Resource (CTR)	1900	16.00
Classified Support (Admin Support)	2200	2.00
Classified Supervisor & Administrator	2300	4.45
Clerical, Technical & Office Staff	2400	19.97
Other Classified (Administrative Support)	2900	0.50
<b>TOTAL FTE POSITIONS BUDGETED</b>		<b>125.02</b>

- \* To ensure compliance with Special Ed regulations, FTE position for Special Ed is at one Special Ed Resource Specialist for every 28 caseload. We calculated the caseload by multiplying the total enrollment by the percentage of Special Ed population compared to total student population. For FY 2021-22, we estimated the Special Ed population at 26%.

**EMPLOYEE BENEFITS**

Employee benefits were calculated using the following rates:

**Table 5:**

	Object	Certificated	Classified
STRS (Teachers Retirement)	3111-12	16.92%	
PERS (Classified Retirement)	3211-12		22.91%
OASDI (Social Security)	3311-12		6.20%
MEDICARE	3321-22	1.45%	1.45%
Health & Welfare - Self-Insured Plan <u>Monthly Rates</u>			
- Medical \$2,100	3401-02		
- Dental \$ 120			
- Vision \$ 27			
- Life Ins. .000095			
State Unemployment Insurance	3501-01	0.50%	0.50%
Worker Compensation Insurance	3601-02	0.93%	0.93%

**NUTRITION PROGRAM EXPENDITURES UNDER OBJECT CODE 4700**

Assembly Bill 1871 requires that non-classroom based (NCB) charter schools shall provide each needy pupil with one nutritionally adequate free or reduced-price meal during each school day. CSSD has expanded this requirement so that all enrolled students are able to select from nutritious items that meet the USDA's nutritious meal requirements at any time, for free, when in our resource centers.

**RESEARCH AND DEVELOPMENT EXPENDITURES UNDER OBJECT CODES 4300 AND 5200**

CSSD has allocated \$81,000 for research and development to support works directed toward innovation, introduction, and improvement necessary for the support of the school consistent with Student Success Programs' mission and purpose.

**PROFESSIONAL/CONSULTING SERVICES AND OTHER OPERATING EXPENDITURES UNDER OBJECT CODE 5800**

The total budget amount for Object Code 5800 is \$2,802,863 representing 10.34% of the Operational Budget. Included in this object code are the district's oversight fees, marketing fees, maintenance agreements, student information systems, technology services, personnel testing, annual financial audits, student files audit, advertising, printing services, MAP assessments, Special Education Services and Support, El Dorado Charter SELPA Admin Fee, software licenses, and legal fees.

**MARKETING**

Pursuant to Education Code Section 47605 (b)(5)(G), CSSD will provide means by which the school will achieve a racial and ethnic balance among its pupils that is reflective of the general population residing within the territorial jurisdiction of the District. The authorizing District has a broad and diverse student population. The budget for marketing will support the significant outreach efforts to ensure that the student body of CSSD reflects the diverse characteristics of the territorial jurisdiction of the authorizing District. CSSD has deployed an integrated marketing plan to support organizational growth. To reach CSSD's target audience, messaging has been tailored for the following mediums: Television, Billboards, Street Posters, Postcards, Email, Mobile, Social Media, Radio and Bus Ads. For FY 2021-22, CSSD has allocated \$241,546 for marketing expenses included in the object code 5800 and represents 0.89% of its total budget.

### **DISTRICT OVERSIGHT FEES**

CSSD will pay its authorizing District (San Diego Unified School District) oversight fees of **1 percent** for apportionments received from the State for LCFF Revenues. The following are revenues subject to calculation of **1 percent oversight fees**:

- Object Code 8011 – LCFF State Aid – Current Year
- Object Code 8012 - Education Protection Account (EPA) Entitlement
- Object Code 8019 - State Aid Prior Years - LCFF
- Object Code 8019 - State Aid Prior Years - EPA
- Object Code 8096 – Charter Schools Funding In Lieu of Property Taxes

CSSD has budgeted \$184,699 for FY 2021-22 for oversight fees.

### **RESERVES**

CSSD has allocated reserves of \$3,096,100 for FY 2021-22 representing 11.42% of total revenues and other financing sources of \$27,105,809.

### **FACILITIES**

CSSD carries contractual lease agreements with an annual cost of \$1,512,346 for FY 2021-22. The total cost of the current lease contracts from July 2021 thru the end of the lease term (Year 2026) is \$4,561,355. CSSD has allocated reserves for this amount. Per the Reserve Policy adopted by the Board, the School shall designate a Contingency/Strategic Reserve Fund to provide a strategic reserve for the School. One of the components of the Contingency/Strategic Reserve Fund is the contractual obligation for facility leases.

The Charter School of  
**SAN DIEGO**

**February Revised Operational Budget**  
**FY 2021-2022**

**REVENUES**

DESCRIPTION	ACCOUNT CODES		FEBRUARY REVISED BUDGET	REVISED PRELIMINARY BUDGET	INCREASE (DECREASE)
<b>LOCAL CONTROL FUNDING FORMULA (LCFF) SOURCES</b>					
LCFF State Aid - Current Year	8011	+	\$ 6,742,357.00	\$ 6,905,675.00	\$ (163,318.00)
Education Protection Account (EPA)	8012	+	324,370.00	332,196.00	(7,826.00)
In Lieu of Property Taxes - Current Year	8096	+	11,403,179.00	11,678,301.00	(275,122.00)
<b>TOTAL, LCFF SOURCES</b>		<b>=</b>	<b>\$ 18,469,906.00</b>	<b>\$ 18,916,172.00</b>	<b>\$ (446,266.00)</b>
<b>FEDERAL REVENUES</b>					
Special Ed: IDEA Basic Local Assistance Entitlement Part B	8181	+	\$ 215,250.00	\$ 215,250.00	\$ -
Special Ed: IDEA Mental Health Allocation Plan, Part B	8182	+	52,364.00	118,558.00	(66,194.00)
Title I, Part A, Improving Basic Programs	8290	+	378,227.00	400,176.00	(21,949.00)
Title II, Part A, Supporting Effective Instruction	8290	+	58,305.00	56,681.00	1,624.00
Title III, Part A, English Learner Student Program	8290	+	25,974.00	25,974.00	-
Title IV, Part A, Student Support and Academic Enrichment	8290	+	26,713.00	26,682.00	31.00
ESSA: School Improvement Funding for LEAs	8290	+	142,809.00	142,809.00	-
Elementary & Secondary School Emergency Relief (ESSER) Fund	8290	+	30.00	30.00	-
Elementary & Secondary School Emergency Relief (ESSER) II Fund	8290	+	668,797.00	666,621.00	2,176.00
Elementary & Secondary School Emergency Relief (ESSER) III Fund	8290	+	627,489.00	492,254.00	135,235.00
Expanded Learning Opportunities (ELO) Grant: ESSER II State Reserve	8290	+	197,865.00	-	197,865.00
ELO Grant: GEER II	8290	+	45,412.00	-	45,412.00
ELO Grant: ESSER III State Reserve, Emergency Needs	8290	+	128,985.00	-	128,985.00
ELO Grant: ESSER III State Reserve, Learning Loss	8290	+	222,348.00	-	222,348.00
<b>TOTAL, FEDERAL REVENUES</b>		<b>=</b>	<b>\$ 2,790,568.00</b>	<b>\$ 2,145,035.00</b>	<b>\$ 645,533.00</b>
<b>STATE REVENUES OTHER THAN LCFF</b>					
Mandate Block Grant	8550	+	\$ 72,860.00	\$ 72,860.00	\$ -
Lottery: Unrestricted	8560	+	282,479.00	259,950.00	22,529.00
Lottery: Unrestricted - Prior Year	8560	+	(4,920.00)	-	(4,920.00)
Lottery: Instructional Materials	8560	+	112,645.00	84,917.00	27,728.00
Lottery: Instructional Materials - Prior Year	8560	+	(2,247.00)	-	(2,247.00)
Special Education	8792	+	1,159,623.00	1,187,601.00	(27,978.00)
Special Ed: Dispute Resolution	8590	+	40,959.00	40,959.00	-
Special Ed: Learning Recovery	8590	+	39,814.00	39,814.00	-
Special Ed: Mental Health Services - Level 2	8590	+	333,662.00	346,793.00	(13,131.00)
Career Technical Education Incentive Grant Program	8590	+	354,371.00	354,371.00	-
Expanded Learning Opportunity (ELO) Grant	8590	+	25,010.00	675,979.00	(650,969.00)
ELO Grant: Paraprofessional Staff	8590	+	56,359.00	-	56,359.00
Educator Effectiveness Block Grant	8590	+	227,607.00	-	227,607.00
<b>TOTAL, STATE REVENUES</b>		<b>=</b>	<b>\$ 2,698,222.00</b>	<b>\$ 3,063,244.00</b>	<b>\$ (365,022.00)</b>
<b>LOCAL REVENUES</b>					
Interest Income	8660	+	\$ 61,164.00	\$ 59,895.00	\$ 1,269.00
All Other Local Revenue	8699	+	134,777.00	158,937.00	(24,160.00)
<b>TOTAL, LOCAL REVENUES</b>		<b>=</b>	<b>\$ 195,941.00</b>	<b>\$ 218,832.00</b>	<b>\$ (22,891.00)</b>
<b>OTHER FINANCING SOURCES</b>					
All Other Financing Sources	8979	+	\$ 2,951,172.00	\$ 2,951,172.00	\$ -
<b>TOTAL, OTHER FINANCING SOURCES</b>		<b>=</b>	<b>\$ 2,951,172.00</b>	<b>\$ 2,951,172.00</b>	<b>\$ -</b>
<b>TOTAL, REVENUES</b>			<b>\$ 27,105,809.00</b>	<b>\$ 27,294,455.00</b>	<b>\$ (188,646.00)</b>

The Charter School of  
**SAN DIEGO**

**February Revised Operational Budget  
FY 2021-2022**

**EXPENDITURES**

DESCRIPTION	ACCOUNT CODES		FEBRUARY REVISED BUDGET	REVISED PRELIMINARY BUDGET	INCREASE (DECREASE)
<b>CERTIFICATED SALARIES</b>					
Certificated Teachers' Salaries	1100	+	\$ 7,035,444.00	\$ 7,052,167.00	\$ (16,723.00)
Certificated Pupil Support Salaries	1200	+	566,671.00	560,554.00	6,117.00
Certificated Supervisors' & Administrators' Salaries	1300	+	770,812.00	779,994.00	(9,182.00)
Other Certificated Salaries	1900	+	443,296.00	467,763.00	(24,467.00)
<b>TOTAL, CERTIFICATED SALARIES</b>		=	<b>\$ 8,816,223.00</b>	<b>\$ 8,860,478.00</b>	<b>\$ (44,255.00)</b>
<b>CLASSIFIED SALARIES</b>					
Classified Instructional Salaries	2100	+	\$ -	\$ -	\$ -
Classified Support Salaries	2200	+	74,158.00	87,657.00	(13,499.00)
Classified Supervisors' and Administrators' Salaries	2300	+	715,028.00	707,382.00	7,646.00
Clerical, Technical and Office Staff Salaries	2400	+	1,206,405.00	1,226,425.00	(20,020.00)
Other Classified Salaries	2900	+	55,975.00	55,975.00	-
<b>TOTAL, CLASSIFIED SALARIES</b>		=	<b>\$ 2,051,566.00</b>	<b>\$ 2,077,439.00</b>	<b>\$ (25,873.00)</b>
<b>EMPLOYEE BENEFITS</b>					
STRS Retirement	3100	+	\$ 1,526,363.00	\$ 1,533,851.00	\$ (7,488.00)
PERS Retirement	3200	+	420,625.00	429,014.00	(8,389.00)
Social Security/Medicare	3300	+	264,458.00	272,795.00	(8,337.00)
Health and Welfare Benefits	3400	+	2,948,416.00	3,007,237.00	(58,821.00)
Unemployment Insurance	3500	+	54,339.00	54,690.00	(351.00)
Workers Compensation Insurance	3600	+	101,594.00	102,248.00	(654.00)
<b>TOTAL, EMPLOYEE BENEFITS</b>		=	<b>\$ 5,315,795.00</b>	<b>\$ 5,399,835.00</b>	<b>\$ (84,040.00)</b>
<b>TOTAL, PERSONNEL COST</b>			<b>\$ 16,183,584.00</b>	<b>\$ 16,337,752.00</b>	<b>\$ (154,168.00)</b>

The Charter School of  
**SAN DIEGO**

**February Revised Operational Budget**  
FY 2021-2022

**EXPENDITURES**

DESCRIPTION	ACCOUNT CODES		FEBRUARY REVISED BUDGET	REVISED PRELIMINARY BUDGET	INCREASE (DECREASE)
<b>BOOKS AND SUPPLIES</b>					
Textbooks and Core Curricula Materials	4100	+	\$ 57,785.00	\$ 52,800.00	\$ 4,985.00
Books and Other Reference Materials	4200	+	5,966.00	5,460.00	506.00
Materials and Supplies	4300	+	267,049.00	294,508.00	(27,459.00)
On-Line Courses	4312	+	138,811.00	138,811.00	-
Research and Development	4313	+	20,250.00	-	20,250.00
Noncapitalized Equipment	4400	+	119,741.00	119,741.00	-
Food	4700	+	10,800.00	10,800.00	-
<b>TOTAL, BOOKS AND SUPPLIES</b>		=	<b>\$ 620,402.00</b>	<b>\$ 622,120.00</b>	<b>\$ (1,718.00)</b>
<b>SERVICES, OTHER OPERATING EXPENSES</b>					
Travel and Conference	5200	+	\$ 109,160.00	\$ 91,583.00	\$ 17,577.00
Research and Development Travel	5202	+	60,750.00	-	60,750.00
Dues and Memberships	5300	+	50,307.00	42,590.00	7,717.00
Liability Insurance	5400	+	171,085.00	171,085.00	-
Operations and Housekeeping Services	5500	+	563,819.00	548,210.00	15,609.00
Rental, Leases, Repairs & Non-Capitalized Improvements	5600	+	1,963,980.00	1,934,953.00	29,027.00
Professional/Consulting Services/Operating Exp.	5800	+	2,561,317.00	2,373,230.00	188,087.00
Marketing Fees	5812	+	241,546.00	194,746.00	46,800.00
Communications	5900	+	407,242.00	388,203.00	19,039.00
<b>TOTAL, SERVICES AND OTHER OPERATING EXPENSES</b>		=	<b>\$ 6,129,206.00</b>	<b>\$ 5,744,600.00</b>	<b>\$ 384,606.00</b>
<b>CAPITAL OUTLAY</b>					
Depreciation - Buildings and Leasehold Improvements	6900	+	\$ 844,110.00	\$ 875,215.00	\$ (31,105.00)
Depreciation - Equipment	6900	+	247,502.00	250,825.00	(3,323.00)
<b>TOTAL, CAPITAL OUTLAY</b>		=	<b>\$ 1,091,612.00</b>	<b>\$ 1,126,040.00</b>	<b>\$ (34,428.00)</b>
<b>OTHER OUTGO</b>					
Debt Service Payment - Interest (Main Street/ASAP Loans)	7438	+	\$ 12,905.00	\$ 12,905.00	\$ -
Debt Service Payment - Interest (Capitalized Leases)	7438	+	13,000.00	13,000.00	-
<b>TOTAL, OTHER OUTGO</b>		=	<b>\$ 25,905.00</b>	<b>\$ 25,905.00</b>	<b>\$ -</b>
<b>RESERVES</b>					
Operation Reserve ( Non-Payroll Expenses)	9780	+	\$ 813,174.00	\$ 486,866.00	\$ 326,308.00
Reserve for Economic Uncertainties	9789	+	2,241,926.00	2,951,172.00	(709,246.00)
<b>TOTAL, RESERVES</b>		=	<b>\$ 3,055,100.00</b>	<b>\$ 3,438,038.00</b>	<b>\$ (382,938.00)</b>
%			<b>11.27%</b>	<b>12.60%</b>	
<b>TOTAL, EXPENDITURES</b>			<b>\$ 27,105,809.00</b>	<b>\$ 27,294,455.00</b>	<b>\$ (188,646.00)</b>