

# Charter School Annual Oversight Report 2023-24

School: \_\_\_\_\_

Current Grade Levels: \_\_\_\_\_

Location(s): \_\_\_\_\_

Assigned Coordinator: \_\_\_\_\_

## Annual Oversight Review Team

Name/Title	Assignment
	Governance & Operations
	Educational Program
	English Language Development
	Special Education
	Fiscal Oversight
	Facilities

## School Site Visits

Date	Reason for Visit	OCDE Staff Name/Title

## Attachments

Date Provided to School	Document
	Financial Scorecard
	Facility Inspection Tool
	Health & Safety Facility Checklist

## Educational Program Description

## Student Population 2023-24

Student Population	Number of Students	Percentage (%)	Statistically Significant Subgroup <sup>1</sup>
English Learners			<input type="checkbox"/>
Foster Youth			<input type="checkbox"/>
Homeless Youth			<input type="checkbox"/>
Students with Disabilities			<input type="checkbox"/>
Socioeconomically Disadvantaged			<input type="checkbox"/>
African American			<input type="checkbox"/>
American Indian/Alaska Native			<input type="checkbox"/>
Asian			<input type="checkbox"/>
Filipino			<input type="checkbox"/>
Hispanic or Latino			<input type="checkbox"/>
Pacific Islander			<input type="checkbox"/>
White			<input type="checkbox"/>
Two or More Races			<input type="checkbox"/>
Not Reported			<input type="checkbox"/>
Total Enrollment			

## ACADEMIC DATA

### Student Achievement Data

School-Administered Alternative Data:

Assessment Platform Used:

Verified data standard met:  Yes  No

School in differentiated assistance:  Yes  No


Overall, the charter school achieved measurable increases in academic achievement, defined by at least one year's progress for each school year.  Yes  Emerging  No

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<sup>1</sup> A statistically significant subgroup group is any student group with at least 30 students or at least 15 students for foster or homeless youth.

# California School Dashboard 2023

Data Source: [www.caschooldashboard.org](http://www.caschooldashboard.org)

Rating: Low  High  
 Red – Orange – Yellow – Green – Blue

## Measure 1b: English Language Arts

Group	Points Above (+) or Below (-) Standard and Color Rating	Comparison with State Average (Above, At, Below)
All Students		
English Learners		
Students with Disabilities		
Homeless Youth		
Foster Youth		
Socioeconomically Disadvantaged		
African American		
American Indian		
Asian		
Filipino		
Hispanic		
Pacific Islander		
Two or More Races		
White		

## Measure 1c: Mathematics

Group	Points Above/Below Standard and Color Rating	Comparison with State Average (Above, At, Below)
All Students		
English Learners		
Students with Disabilities		
Homeless Youth		
Foster Youth		
Socioeconomically Disadvantaged		
African American		
American Indian		
Asian		
Filipino		
Hispanic		
Pacific Islander		
Two or More Races		
White		

### Measure 1d: English Learner Progress

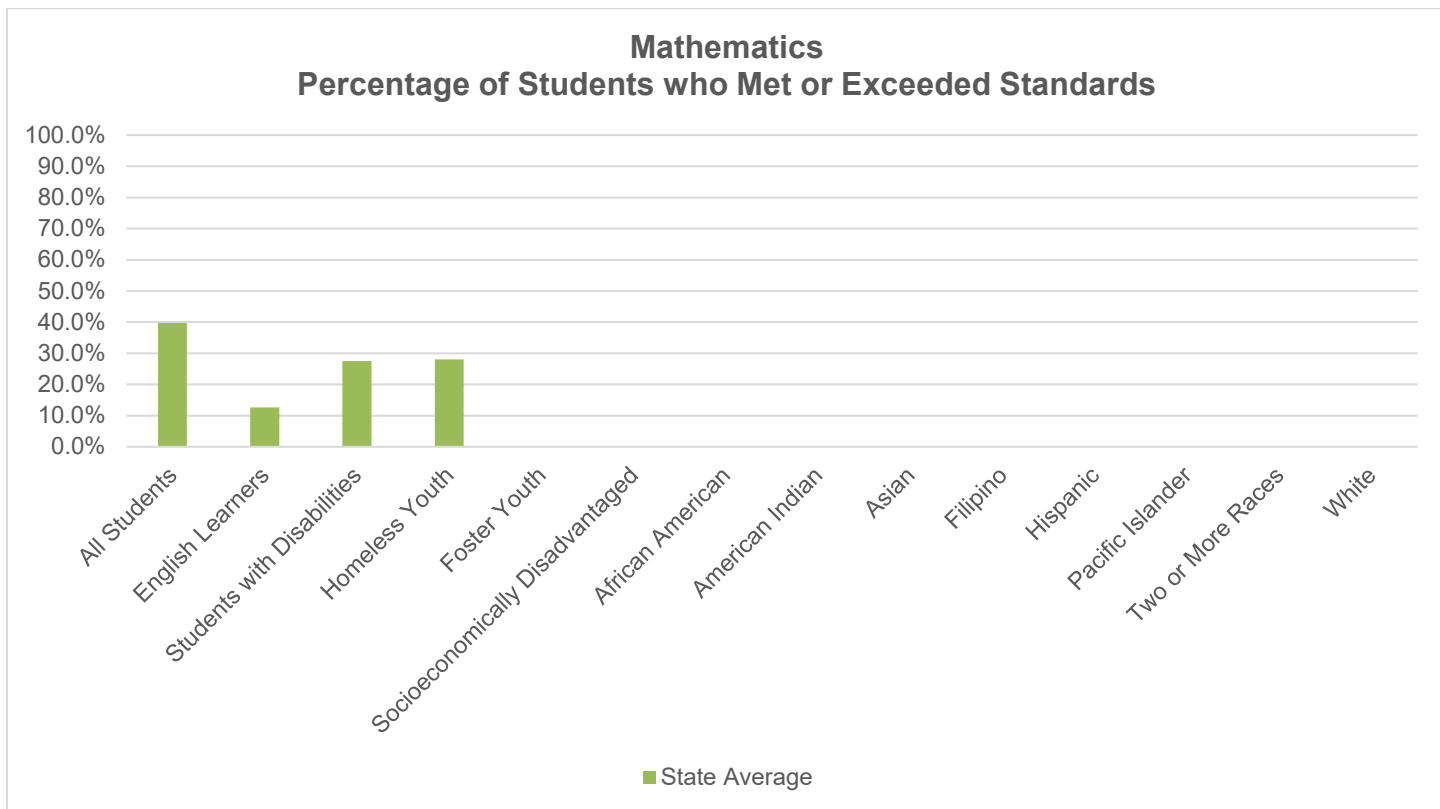
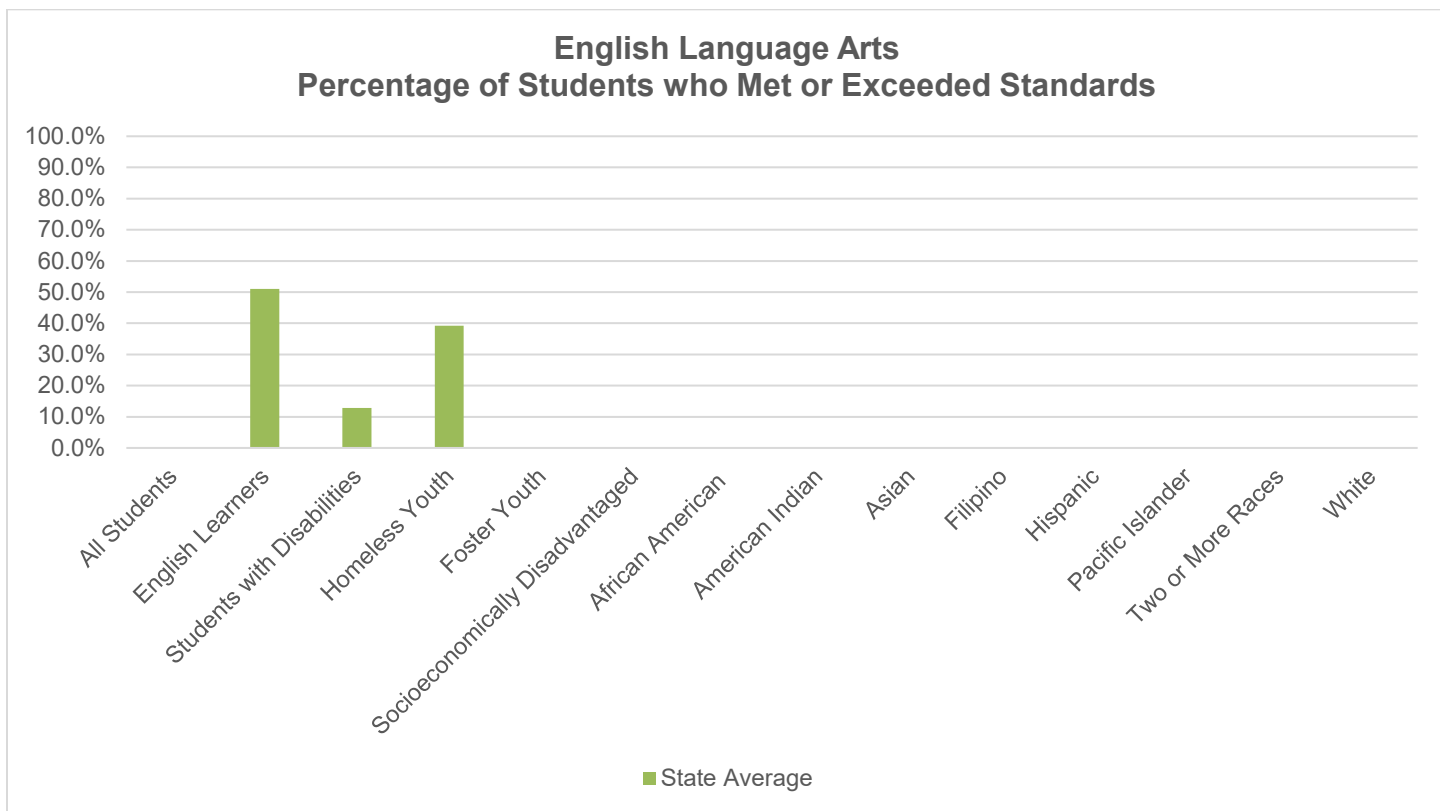
Percent making progress toward proficiency	Performance Level	Comparison with State Average (Above, At, Below)

### Measure 1e: College/Career (high school only)

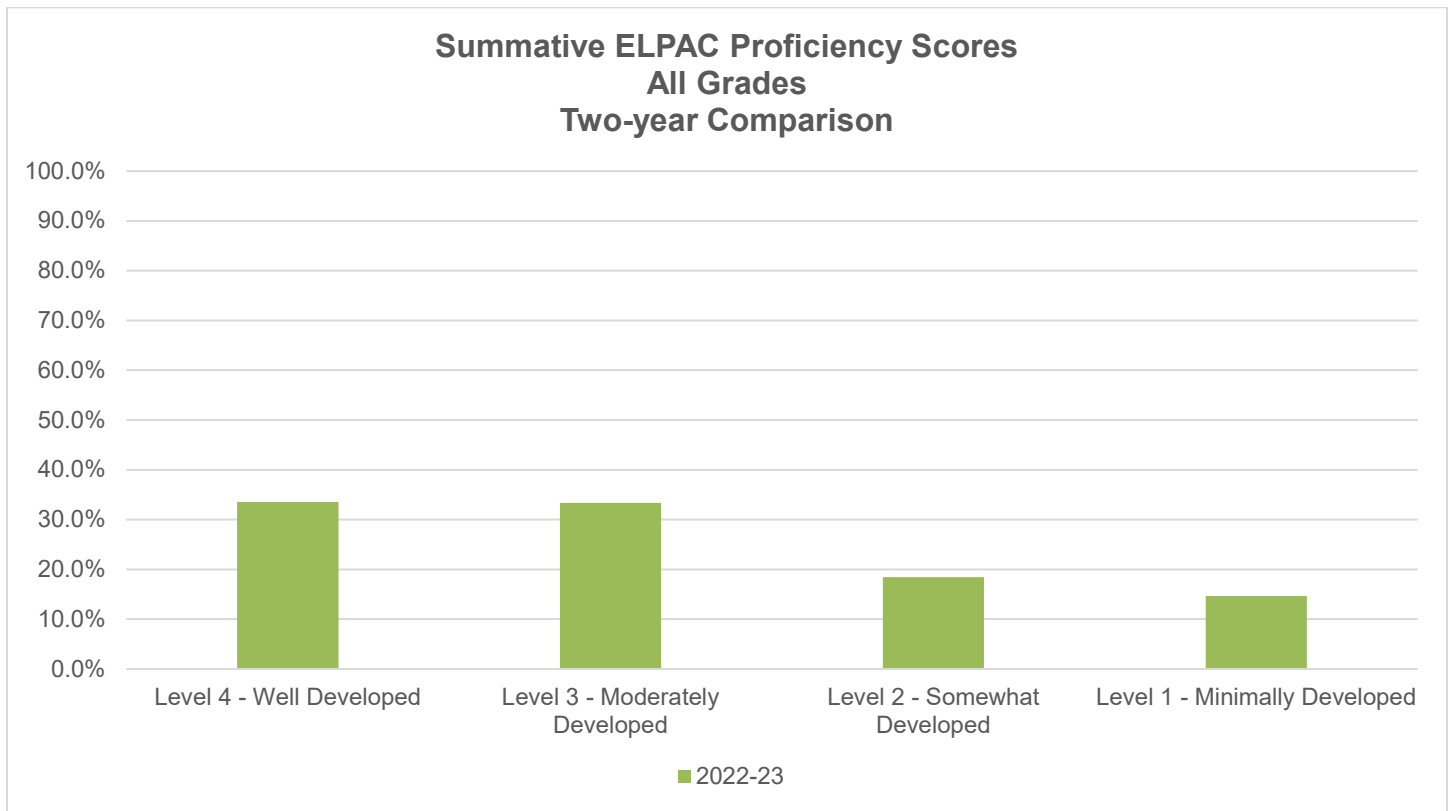
Group	Percent Prepared & Color Rating	Comparison with State Average (Above, At, Below)
All Students		
English Learners		
Students with Disabilities		
Homeless Youth		
Foster Youth		
Socioeconomically Disadvantaged		
African American		
American Indian		
Asian		
Filipino		
Hispanic		
Pacific Islander		
Two or More Races		
White		

Measure	2a: Chronic Absenteeism	2b: Graduation	3a: Suspension
	Percent and Color Rating		
All Students			
English Learners			
Students with Disabilities			
Homeless Youth			
Foster Youth			
Socioeconomically Disadvantaged			
African American			
American Indian			
Asian			
Filipino			
Hispanic			
Pacific Islander			
Two or More Races			
White			

## CAASPP Achievement Data 2022-23



**Summative ELPAC 2022-23 OR 2021-22 & 2022-23**



**COMPLIANCE DATA**

**Notices of Concern/Corrective Action - Charter Term Year-Year**

Notice(s) of Concern or Corrective Action issued in the current charter term and summary of the school's response(s).

Date	Concern/Corrective Action	School Response

**Epicenter Compliance Statistics – Date Retrieved**

**II. ACADEMIC PERFORMANCE AND ONGOING ASSESSMENT**

(\* Indicates information gathered during the oversight visit.)

<b>A. Pupil Achievement Data</b>	<b>Met / Not Met / Partially Met</b>
1. The school disaggregates and analyzes data regularly to address individual student needs.*	
2. The school monitors the components of its instructional program designed to meet the learning needs of all students who achieve either significantly below or above grade level to receive instruction that addresses their learning differences.*	
3. The school uses summative data for English learners to guide curriculum and instruction.*	
4. Pupil achievement data is reported regularly to the school’s governing board, parents and staff.*	
<b>B. California Assessment of Student Performance and Progress</b>	<b>Met / Not Met / Partially Met</b>
1. All numerically significant subgroups demonstrate growth in CAASPP ELA performance.	
2. All numerically significant subgroups demonstrate growth in CAASPP Mathematics performance.	
3. The schoolwide percentage of students who Met and Exceeded Standards in grades 3–8 and 11 on the CAASPP in English Language Arts is at or above the state average.	
4. The schoolwide percentage of students who Met and Exceeded Standards in grades 3–8 and 11 on the CAASPP in Mathematics is at or above the state average.	
<b>C. California Dashboard</b>	<b>Met / Not Met / Partially Met</b>
1. The school demonstrated on the California Dashboard the highest performance levels (Blue/Green) on the following state indicators for two consecutive years: <ul style="list-style-type: none"> <li><input type="checkbox"/> English Language Arts and Mathematics Assessments (CAASPP)</li> <li><input type="checkbox"/> English Language Proficiency Assessments for California (ELPAC)</li> <li><input type="checkbox"/> Chronic absenteeism (K-8)</li> <li><input type="checkbox"/> High School graduation rate</li> <li><input type="checkbox"/> Suspension rate</li> <li><input type="checkbox"/> College and Career Readiness (11th grade)</li> <li><input type="checkbox"/> Local formative student achievement data</li> </ul>	
2. The school performed at or above the state average for the majority of statistically significant subgroups (English learners, socioeconomically disadvantaged pupils, foster youth, homeless youth, students with disabilities, and racial/ethnic groups).	

# ACADEMIC PERFORMANCE AND ONGOING ASSESSMENT SUMMARY

## Areas of Strength and Progress

## Recommendations for Further Growth and Improvement

### III. EDUCATIONAL PROGRAM

<b>A. Curriculum, Instruction and Implementation of Standards</b>	<b>Met / Not Met / Partially Met</b>
1. All students have available and use state standards-based instructional materials.*	
2. The school ensures access to devices and connectivity for all students.*	
3. The school has implemented standards-based instruction per state academic content standards, including California Common Core State Standards, California English Language Development Standards and Next Generation Science Standards.*	
4. The school implements differentiation, intervention and other instructional strategies and approaches described in the charter petition designed to meet all students' learning needs, including all subgroups.*	
5. The school offers opportunities for students to become college and career-ready (e.g., Career Technical Education, Advanced Placement Exams, International Baccalaureate Exams, College Credit Courses, A-G Courses, State Seal of Biliteracy, Military Science/Leadership)	
6. Parents are informed about the transferability of courses to other public high schools and the eligibility of courses to meet college entrance requirements, including A-G requirements.	
<b>B. Staffing and Professional Development</b>	
1. The school has implemented a data-driven professional development plan for teachers and other staff that supports instructional practices, targets identified needs and aligns with the education program outlined in the charter petition.*	
2. The school provides opportunities for teachers to collaborate regularly to plan and improve curriculum and instruction.*	
3. The school has an evaluation system for school staff.*	
4. All certificated staff is fully credentialed as required by the California Commission on Teacher Credentialing, and the qualifications required by the federal Every Student Succeeds Act, and have a certificate of clearance; and satisfy the requirements for professional fitness under Education Code sections 44339, 44340 and 44341.	
<b>C. Services for Students with Disabilities</b>	<b>Met / Not Met / Partially Met</b>



1. The school implements, monitors and modifies, as appropriate, a comprehensive Special Education Annual Plan that demonstrates an understanding of and compliance with all laws related to identifying and educating students with disabilities.*	
2. The school complies with timelines related to special education, including legal requirements for scheduling and conducting IEPs.*	
3. Students identified as eligible for special education receive services required by their IEPs.*	
4. General education teachers who serve special needs students have access to those students' IEPs.*	
5. The school has a process for determining a student's eligibility for services under Section 504 of the Rehabilitation Act of 1973 and implements accommodation plans.*	
6. The school uses instructional curricula and materials that address the specific needs of special education students.*	
7. Pupil records include pertinent data regarding court documents, IEPs, 504 plans and assessment records and evidence of participation in special education programs, including required tests, case studies, authorizations and actions necessary to establish eligibility for admission or discharge.*	
8. The school participates in special education professional development training that provides technical assistance and ensures that teaching and support staff maintain the skills required to perform their jobs.*	
9. The school understands and carries out its Child Find obligation for all students enrolled in the school.*	
10. The school consistently follows its discipline policy regarding students with disabilities, including conducting manifestation determinations.*	
11. The school has developed a means to track students' progress with disabilities aside from standardized state tests (e.g., progress on goals of the IEP, degree of inclusion in the general education classroom, student retention and graduation).*	
12. If the school has been the subject of a due process complaint or complaints, the complaints were procedural, not substantive (e.g., minor compliance concerns vs. provisions of FAPE).	
<b>D. Services to Students Who Are English Learners</b>	<b>Met / Not Met / Partially Met</b>
1. A qualified staff member is designated to oversee and coordinate the EL program.*	
2. Staff receive appropriate training to implement a comprehensive EL program, including identifying and serving students, monitoring reclassified students, supporting families with limited English proficiency, and administering ELPAC assessments.*	
3. The school's Master Plan for English Learners includes EL identification, designated and integrated English Language Development instruction, progress monitoring, assessment, and reclassification.*	

4. The school follows its Master Plan for English Learners and can provide reclassification data to measure success.*	
5. The school uses instructional practices, curricula and materials that address the specific needs of English learners.*	
6. Students identified as ELs can participate meaningfully and equitably in the school's curriculum and activities (e.g., designated/integrated time does not conflict with enrichment time and access to grade-level core instructional curricula).*	
7. The school monitors the academic progress of former ELL students for four years to ensure the students can progress at an appropriate pace in the regular instructional program.*	
8. The school actively engages, recruits and encourages enrollment of EL and Limited English Proficiency students and families through ELAC, school materials and websites available in other languages and by providing translators at school events, such as open houses.	
9. The school regularly evaluates the effectiveness of the ELD program.	

## EDUCATIONAL PROGRAM SUMMARY

### Areas of Strength and Progress

### Recommendations for Further Growth and Improvement

## IV. OPERATIONS

### A. Organizational Management

**Met / Not Met /  
Partially Met**

1. The school promptly responds to all reasonable inquiries from the authorizer.	
2. The school is operated by a nonprofit 501(c)(3), including CMO/EMO.	
3. The school has an up-to-date organizational chart that aligns with the bylaws and complies with the law.	
4. All management and board members file Form 700s on time.	
5. The school files Form 990 on time.	
6. The school has personnel policies that cover issues such as sick leave, overtime, etc.	

### B. Admissions, Enrollment and Pupil Records

**Met / Not Met /  
Partially Met**

1. Mandatory Permanent Pupil Records include*: <input type="checkbox"/> Legal name, sex and place of birth of pupil <input type="checkbox"/> Date of birth and method of verification <input type="checkbox"/> Name and address of the parent, residence of the pupil, and method of verification	
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<input type="checkbox"/> Verification of or exemption from required immunizations	
2. Mandatory Interim Pupil Records include* <input type="checkbox"/> Pertinent data regarding court documents, IEPs, 504 plans, and assessment records. <input type="checkbox"/> A log or record identifying those persons (except authorized school personnel) requesting, viewing, or receiving information from the record.	
3. The school securely stores student cumulative files, records, reports and documents.*	
4. Application forms indicate compliance with all applicable laws and the approved charter petition.	
5. If the school needed to conduct a lottery, there is documentation that the process was completed as described in the charter petition.	

**C. Health and Safety**

**Met / Not Met / Partially Met**

1. School facilities are clean and maintained to provide a safe learning environment.*	
2. The school staff is trained and conducts emergency drills and maintains onsite emergency supplies to ensure it is able and prepared to implement its emergency procedures in the event of a natural disaster or emergency.*	
3. Facilities are sufficient to accommodate estimated student enrollment and to carry out the curricular and instruction program envisioned in the charter petition.*	
4. The school has a comprehensive visitors' policy that is visible in the main office.*	
5. The facilities are situated to minimize student contact with adults who do not have appropriate clearances as required by Education Code Section 44237 and have proper security (e.g., fencing, adequate lighting, alarms, etc.).*	
6. The school conducts criminal background checks for all volunteers who perform school site services while not under the direct supervision of a school employee and tuberculosis (TB) risk assessments/clearances for all volunteers with frequent or prolonged contact with students.*	
7. The charter school has acquired all necessary school facility permits, inspections, and leases.	
8. All school employees have been subject to criminal background checks (FBI & DOJ) and tuberculosis risk assessments.	
9. The school complies with required annual notices and website postings under current law.	
10. The school maintains insurance coverage, as delineated in the Agreement.	
11. By March 1, annually, the school reviews and updates its comprehensive health, safety, disaster preparedness and emergency plans.	
12. School employees are trained in blood-borne pathogens, child abuse reporting, staff and student relationships, and sexual harassment.	

**OPERATIONS SUMMARY**

Areas of Strength and Progress

Recommendations for Further Growth and Improvement

**V. GOVERNANCE**

**A. Governance Structure and Accountability**

**Met / Not Met / Partially Met**

1. The governing board complies with all applicable laws and regulations according to the board bylaws, open meeting requirements, the charter petition, and the Agreement with the authorizer.	
2. The governing board is free of actual or perceived conflicts of interest.	
3. Vacancies are filled promptly and per the bylaws.	
4. The governing board has implemented the composition, organizational structure, committees/councils, identified officers and responsibilities outlined in the approved charter petition and bylaws as required by law.	
5. The governing board has resolutions, board-adopted policies, and systems to ensure that the school provides adequate due process per applicable law and the charter petition to protect the rights of students, employees, parents and the public.	
6. The school leadership consistently provides information and consults with the governing board to cultivate shared accountability.	
7. The governing board adheres to applicable open-meeting requirements under the Brown Act, including posting agendas and the availability of documents.	
8. The governing board receives annual Brown Act and Political Fair Practices Act training.	
9. The governing board regularly monitors school performance and other internal data to inform decision-making.	
10. The school is transparent regarding actual and potential liabilities and provides timely information to the authorizer and school governing board.	
11. The governing board has a system to ensure fiscal viability, including reviewing and approving budget reports and financial statements and knowledge of the school's short- and long-term financial outlook.	
12. The governing board evaluates school leadership.	

**B. Board Meeting Review** Meeting Date: [Click or tap to enter a date.](#)

**Met / Not Met / Partially Met**

1. The agenda for the current meeting is posted in plain view in a prominent place on campus.	
2. The agenda was posted at least 72 hours before a regular meeting and at least 24 hours before a special board meeting.	

3. The agenda contains a brief general description of each item of business to be discussed or voted on during the meeting.	
4. Documents are made available for public inspection at the same time as distributed to a majority of the board.	
5. A quorum of board members is present within the boundaries of the district/county where the school operates.	
6. The agenda identifies the location of each board member attending the meeting remotely.	
7. The meeting is called to order, and a roll call of board members is performed.	
8. If one or more board members are not physically present, voting for all action items utilizes a roll call vote.	
9. The board did not discuss or vote on non-agendized items.	
10. The board has protocols for hearing public comments and listens to the words without comment.	
<p>11. The topic(s) scheduled for the closed session were related to one of the following and included a brief description of each item:</p> <p><input type="checkbox"/> <i>License/Permit Determination</i> (specify the number of applicants)</p> <p><input type="checkbox"/> <i>Conference with Real Property Negotiators</i> (specify street address of the real property under negotiation; specify names of agency negotiators attending the closed session; specify names of negotiating parties (not agent); specify whether the instruction to negotiator will concern price, terms of payment, or both)</p> <p><input type="checkbox"/> <i>Conference with Legal Counsel</i></p> <ul style="list-style-type: none"> <li>• Significant exposure to litigation (specifies the number of potential cases)</li> <li>• Existing litigation (specify the name of the case by reference to claimant's name, names of parties, case or claim numbers, or if case name is specified, specify whether disclosure would jeopardize service of process or existing settlement negotiations)</li> <li>• Initiation of litigation (specify the number of potential cases)</li> </ul> <p><input type="checkbox"/> <i>Liability Claims</i> (specify the name of the claimant unless unspecified; specify the name of the agency claimed against)</p> <p><input type="checkbox"/> <i>Threat to Public Services or Facilities</i> (specify name of law enforcement agency and title of officer or name of applicable agency representative and title)</p> <p><input type="checkbox"/> <i>Public Employee Appointment or Public Employment</i> (specify a description of the position to be filled)</p> <p><input type="checkbox"/> <i>Public Employee Performance Evaluation</i> (Title: specify position title of employee being reviewed)</p> <p><input type="checkbox"/> <i>Public Employee Discipline/Dismissal/Release</i> (No additional information is required; includes potential reduction of compensation)</p> <p><input type="checkbox"/> <i>Conference with Labor Negotiators</i> (specify names of designated representatives attending the closed session; specify the name of the organization representing the employee; specify position title of unrepresented employee who is the subject of the negotiations)</p> <p><input type="checkbox"/> Other (case review/planning, trade secret, hearings, etc.)</p>	
12. The board reported decisions made and votes taken after the closed session.	

## GOVERNANCE SUMMARY

### Areas of Strength and Progress

### Recommendations for Further Growth and Improvement

#### VI. BUDGET AND FINANCE

<b>A. Attendance</b>	<b>Met / Not Met / Partially Met</b>
1. The staff person primarily responsible for attendance reporting is trained in CALPADS and attendance software.	
2. There are approved board policies that address student attendance, including short-term independent study.	
3. There is a board-approved charter school calendar and class (bell) schedule.	
4. The charter school has a process to monitor and ensure compliance with the requirements for minimum instructional minutes, and there is an assigned individual for monitoring compliance.	
5. There are at least 175 instructional days unless reduced by statute or law due to extraordinary circumstances.	
6. The charter school maintains class lists that include all students.	
7. Absences are excluded from the apportionment days.	
8. Attendance records are maintained for audit.	
9. There is a process to compile schoolwide ADA.	
10. Projected enrollment and ADA are realistic.	
<b>B. Independent Study (if applicable)</b>	<b>Met / Not Met / Partially Met</b>
1. Certificated teachers evaluate pupil work product for time value for apportionment purposes. [EC 51747.5(b), 5 CCR 11700(v)(2) and (l), 5 CCR 11703(b)(4)]	
2. The charter school's ratio of ADA to full-time equivalent (FTE) certificated employees is equal to or less than 25-to-1 OR the ratio of pupils to FTE certificated employees for all other educational programs operated by the largest unified school district, as measured by ADA as reported at the second principal apportionment in the prior year, in the county or counties where the charter school operates.	
3. The charter school has written policies related to independent study that indicate compliance with Education Code Section 51747.	
4. The charter school has records demonstrating adherence to Education Code Section 51747 policies.	

<b>C. Cash Receipts</b>	<b>Met / Not Met / Partially Met</b>
1. There are approved policies and procedures regarding cash receipts.	
2. Receipts are issued for all cash, cashier's checks, and money orders received. <input type="checkbox"/> Receipts are prenumbered/sequentially generated. <input type="checkbox"/> Receipts are reconciled to the deposit.	
3. An audit trail is maintained to ensure the deposit of all monies.	
4. Cash is stored securely, and deposits are made promptly.	
5. At least two employees count cash, and the employees must sign documentation.	
6. Duties are segregated for receipt of monies, deposit of funds, and reconciliation of bank statements.	
<b>D. Disbursements</b>	<b>Met / Not Met / Partially Met</b>
1. There are approved policies regarding disbursements that include: <input type="checkbox"/> An original invoice from the vendor. <input type="checkbox"/> A receiving document. <input type="checkbox"/> Appropriate preapproval of the purchase	
2. Encumbrances are recorded, tracked, and relieved as appropriate.	
3. Authorized employees sign checks and require two signatures.	
4. Actual signatures are used.	
5. There are approved policies regarding using credit cards issued under the school's name.	
6. The charter school has a method to calculate and pay use tax for online purchases.	
7. There is a system to maintain vendor payment information to prepare 1099s.	
8. There are approved policies and procedures for segregating duties among purchasing, receiving and accounts payable.	
9. The governing board approves/ratifies disbursements.	
10. Related party vendors/contractors/organizations/entities/individuals are identified for possible disclosure in the audit report.	
<b>E. Payroll</b>	<b>Met / Not Met / Partially Met</b>
1. Federal and state tax deposits are made per the monthly/quarterly payment schedule.	
2. Earnings subject to retirement are reported to Social Security, CalPERS, and CalSTRS.	
3. The charter school has a system to provide employee earnings records, including CalSTRS and CalPERS data, to the authorizing LEA and county office of education.	

4. There is a system to maintain employee earnings records to prepare W-2s.	
5. There is a segregation of duties among staff who process and maintain employee data, salary schedules, and payroll payments.	
6. The charter school uses a position control system or spreadsheet that reconciles with the budget and payroll.	
<b>F. Budget, Accounting and Financial Reporting</b>	<b>Met / Not Met / Partially Met</b>
1. All required financial documentation has been submitted to the authorizer on time during each reporting cycle.	
2. The charter school submits data for CALPADS and meets deadlines.	
3. There are approved budgets, short-term/long-term debt, accruals, accounting and financial reporting policies, including implementation of the LCFF and the charter school's annual requirement to update the LCAP to account specifically for the expenditures of the supplemental and concentration grant funds generated by unduplicated pupils.	
4. The governing board has approved the budget within the appropriate timelines and includes sufficient expenditures to implement the LCAP.	
5. There is a process to review and revise the budget for student enrollment and operations changes.	
6. Enrollment projections are reasonable and based on a waiting list or other significant events.	
7. The governing board regularly reviews the budget and financial statements of the charter school and demonstrates knowledge of the charter school's short- and long-term financial outlook.	
8. The governing board approves/ratifies the budget and budget revisions.	
9. The governing board approves/ratifies contracts and purchase orders per approved policies and procedures.	
10. The charter school maintains a list of short- or long-term debt obligations and includes them in the budget.	
11. Separate accounts are maintained for unrestricted and restricted revenues and expenditures per the California School Accounting Manual (CSAM).	
12. Financial reports are accurate, and the governing board reviews them regularly per the board's policy.	
13. Cash flow projections are prepared and updated regularly to ensure sufficient funds are available to meet the charter school's financial obligations.	
14. Cash flow reconciles with ending fund balance/net assets. (The charter includes an accrual column in their cash flow analysis.)	
15. Revenues are calculated accurately, given actual ADA and funding formulas.	
16. Expenditure projections are reasonable based on actual ADA, FTE and operational expenses.	



17. A prudent level of reserves is maintained for economic uncertainties based on the number of ADA.	
18. Multiyear financial projections include long-term debt obligations, and assumptions are reasonable.	
19. Based on the projections, the charter school will be able to meet its financial obligations and maintain a positive fund balance and a prudent level of cash reserves to meet its financial obligations in the current and two subsequent fiscal years.	
20. There are approved policies regarding the purchase and maintenance of equipment.	
21. An equipment inventory is: <ul style="list-style-type: none"> <li><input type="checkbox"/> Maintained and on file at the main office.</li> <li><input type="checkbox"/> Conducted physically at each site.</li> </ul>	
22. Equipment purchased with federal funds or donations is identified.	
23. If the charter school receives federal funds, it complies with the posting on its website in a prominent, conspicuous location the Title IX information, including the name, contact number and email of the Title IX Coordinator for that school. [EC 221.61]	
24. If the charter school receives funds from the EPA, the governing board determines the use of the EPA funds at an open public meeting.	
25. If the charter school receives funds from the EPA, it complies with posting Article XIII, Section 36, Subdivision (e), Paragraph (6) of the California Constitution, which requires on their website an accounting of how much money was received and how that money was spent.	

**G. Audit**

**Met / Not Met / Partially Met**

1. The chosen independent audit firm is on the State Controller's Office approved list.	
2. The school maintains all necessary records for audit.	
3. The first annual independent audit occurred after the charter school spent or received any money (from any source), obtained its first asset or incurred its first obligation.	
4. On or before December 15 of the subsequent fiscal year, a copy of the audit for the prior year has been provided to the authorizing LEA, the county superintendent of schools of the county in which the charter school is located, the State Controller's Office, and the California Department of Education, per Education Code Sections 47605 and 41020.	
5. Audit adjustments, restatements, or financial corrections identified by the auditors have been recorded in the financial records so that the general ledger, ending fund balance and all other accounts are accurately recorded.	
6. A corrective action plan has been developed and implemented for each audit finding, and recommendations were presented to the governing board by January 31 each year per Education Code Section 41020.3.	
7. The prior year's audit recommendations have been implemented.	

**H. Local Control and Accountability Plan (LCAP)**

**Met / Not Met / Partially Met**

1. The charter school completed, held a public hearing, adopted an LCAP (or annual update) and submitted it to the charter school authorizer per Education Code sections 47604.33 and 47606.5	
2. The charter school used the current State Board of Education LCAP template.	
3. The charter school prominently posted on the home page of its website the LCAP adopted by the governing board and any updates or revisions.	
4. The charter school LCAP addresses each of the following state priorities. <input type="checkbox"/> Priority 1: credentials, materials and facilities. <input type="checkbox"/> Priority 2: academic standards, including English learners (EL). <input type="checkbox"/> Priority 3: parental involvement. <input type="checkbox"/> Priority 4: pupil achievement. <input type="checkbox"/> Priority 5: pupil engagement. <input type="checkbox"/> Priority 6: school climate. <input type="checkbox"/> Priority 7: course of study. <input type="checkbox"/> Priority 8: other pupil outcomes.	
5. Schoolwide goals are included for the applicable priorities.	
6. The following subgroups are listed based on prior year demographic data: <input type="checkbox"/> Racial/ethnic subgroups. <input type="checkbox"/> Socioeconomically disadvantaged. <input type="checkbox"/> English learners. <input type="checkbox"/> Pupils with disabilities. <input type="checkbox"/> Foster youth.	
7. Subgroup goals are included for the applicable priorities.	
8. The charter school presented a report on the annual update to the LCAP and the LCFF Budget Overview for Parents on or before February 28 at a regularly scheduled board meeting, which included: <input type="checkbox"/> Midyear outcome data related to metrics identified in the current year's LCAP.	
9. <input type="checkbox"/> Midyear expenditure and implementation data for actions identified in the current year's LCAP.	
<b>I. Other</b>	<b>Met / Not Met / Partially Met</b>
1. No commingling or personal use of charter funds is evident.	
2. Form 700s and Form 990s show no evidence of conflicts of interest violations or gifts of public funds.	

## **BUDGET AND FINANCE SUMMARY**

### Areas of Strength and Progress

### Recommendations for Further Growth and Improvement

**DOCUMENTS AND EVIDENCE REVIEWED**

<input type="checkbox"/> Academic Calendar and Daily Bell Schedule	<input type="checkbox"/> A-G Approved Courses – High School Only	<input type="checkbox"/> Agreement/MOU
<input type="checkbox"/> Annual Audit Report	<input type="checkbox"/> Anti-Discrimination, Harassment & Bullying Policy	<input type="checkbox"/> Application for Enrollment
<input type="checkbox"/> Articles of Incorporation	<input type="checkbox"/> Attendance Accounting Policy	<input type="checkbox"/> Authorized Banking Signers
<input type="checkbox"/> Board Meeting Agenda Posting	<input type="checkbox"/> Board Meeting Packets & Audio	<input type="checkbox"/> Board Roster & Mtg. Schedule
<input type="checkbox"/> Board Meeting Observation	<input type="checkbox"/> Business License	<input type="checkbox"/> Bylaws
<input type="checkbox"/> Campus Site Plan/Facility Map	<input type="checkbox"/> Certificate of Occupancy	<input type="checkbox"/> Cert. of Annual Board Training
<input type="checkbox"/> Cert. of Employee Screening	<input type="checkbox"/> Cert. of Health and Safety	<input type="checkbox"/> Cert. of Instructional Min./Days
<input type="checkbox"/> Cert. of Monthly Enrollment	<input type="checkbox"/> Chart of Accounts	<input type="checkbox"/> CMO/EMO Contract
<input type="checkbox"/> Charter Petition	<input type="checkbox"/> Check/Credit Card Registers	<input type="checkbox"/> Classroom Observation
<input type="checkbox"/> Community Meetings	<input type="checkbox"/> Conditional Use Permit	<input type="checkbox"/> Conflict of Interest Code
<input type="checkbox"/> Contracts/Agreements	<input type="checkbox"/> Credentials Verification	<input type="checkbox"/> Curriculum & Materials
<input type="checkbox"/> Debt Agreements	<input type="checkbox"/> Claims/Litigation; Criminal/Civil Actions	<input type="checkbox"/> Discussion with School Leadership
<input type="checkbox"/> Discussion with Teaching Staff	<input type="checkbox"/> EPA Resolution & Accounting	<input type="checkbox"/> Employee Compensation Plan
<input type="checkbox"/> Employee Handbook	<input type="checkbox"/> ELPAC Summative Reports	<input type="checkbox"/> English Learner Plan
<input type="checkbox"/> ELOP Plan	<input type="checkbox"/> Facilities Lease Agreement	<input type="checkbox"/> Financial Policies
<input type="checkbox"/> Fire Marshal Inspection	<input type="checkbox"/> Form 700s	<input type="checkbox"/> Form 990
<input type="checkbox"/> Formative Assessments	<input type="checkbox"/> General Complaint & UCP	<input type="checkbox"/> General Ledger
<input type="checkbox"/> Health Department Permit	<input type="checkbox"/> Independent Study Policies	<input type="checkbox"/> Insurance Certificate
<input type="checkbox"/> Inventory of Capitalized Assets	<input type="checkbox"/> Liabilities Short-/Long-Term	<input type="checkbox"/> LCAP
<input type="checkbox"/> Mathematics Placement Policy	<input type="checkbox"/> Organizational Chart	<input type="checkbox"/> Payroll Registers
<input type="checkbox"/> Professional Development Plan	<input type="checkbox"/> Record Retention Policy	<input type="checkbox"/> Required Annual Notices
<input type="checkbox"/> Required Website Postings	<input type="checkbox"/> Safety and Emergency Plan	<input type="checkbox"/> SARC
<input type="checkbox"/> SELPA Acceptance/Agreement	<input type="checkbox"/> SELPA Letter of Good Standing	<input type="checkbox"/> Sexual Harassment Policy
<input type="checkbox"/> Staff Roster	<input type="checkbox"/> Staff-Student Interaction Policy	<input type="checkbox"/> Student Cumulative Records
<input type="checkbox"/> Student/Family Handbook	<input type="checkbox"/> SPED Master Plan	<input type="checkbox"/> Suicide Prevention Policy
<input type="checkbox"/> Tax-Exempt Status 501(c)(3)	<input type="checkbox"/> Temporary Cert. of Occupancy	<input type="checkbox"/> Title IX Policy
<input type="checkbox"/> Trial Balance	<input type="checkbox"/> Vendor Policies	<input type="checkbox"/> Website review
<input type="checkbox"/> Wellness Policy	<input type="checkbox"/> Year-End Bank Statement	<input type="checkbox"/> Other:

## **ACRONYMS**

<b>ADA</b>	Average Daily Attendance
<b>CAASPP</b>	California Assessment of Student Performance and Progress
<b>CALPADS</b>	California Longitudinal Pupil Achievement Data System
<b>CALPERS</b>	California Public Employees' Retirement System
<b>CALSTRS</b>	California State Teachers' Retirement System
<b>CCR</b>	California Code of Regulations
<b>CMO/EMO</b>	Charter/Education Management Organizations
<b>CSAM</b>	California School Accounting Manual
<b>CTE</b>	Career Technical Education
<b>EC</b>	Education Code
<b>ELA</b>	English Language Arts
<b>ELAC</b>	English Learner Advisory Committee
<b>ELOP</b>	Expanded Learning Opportunities Program
<b>ELPAC</b>	English Language Proficiency Assessments for California
<b>EPA</b>	Education Protection Account
<b>FAPE</b>	Free Appropriate Public Education
<b>FERPA</b>	Family Educational Rights and Privacy Act
<b>FTB</b>	Franchise Tax Board
<b>FTE</b>	Full-Time Equivalent
<b>IEP</b>	Individualized Education Program
<b>IRS</b>	Internal Revenue Service
<b>LCAP</b>	Local Control Accountability Plan
<b>LEA</b>	Local Education Agency
<b>LEP</b>	Limited English Proficiency
<b>SARC</b>	School Accountability Report Card
<b>SELPA</b>	Special Education Local Plan Area
<b>UCP</b>	Uniform Complaint Procedure/Policy