



## TACMO Board Meeting-April 2021 Agenda

**DATE:** Thu April 15th, 2021  
**TIME:** 6:30pm - 8:30pm PDT  
**LOCATION:** Zoom  
**GROUPS:** Board  
**REMOTE:** <https://us02web.zoom.us/j/83778165355>

### **Attendance and Public Comment Changes Due to COVID-19**

The Academies CMO Board of Directors will be conducting its Board meeting on April 15, 2021. Given the current Social Distance Guidelines issued by Federal, State, and Local Authorities, The Academies CMO is implementing the following changes for attendance and public comment.

The Academies CMO Board meeting to be held on April 15, 2021 at 6:30 p.m. will **only be accessible via Zoom.** The meeting may be viewed through the following options:

- Zoom: <https://us02web.zoom.us/j/83778165355>

The Academies CMO will also provide links to the streaming option on the TACMO website and on its Facebook page.

Unfortunately, physical attendance by the public cannot be accommodated given the current circumstances and the need to ensure the health and safety of The Academies CMO Board, The Academies CMO staff, and the public as a whole.

If you wish to make a general public comment or public comment on a particular item on the agenda, **you must submit your public comments by e-mail to:** [dball@theacademiescharters.org](mailto:dball@theacademiescharters.org). In the subject line of the e-mail, please state your name and the item you are commenting on. If you wish to submit a public comment on more than one agenda item, please send a separate e-mail for each item you are commenting on. Please be aware that written public comments, including your name, may become public information. Additional requirements for submitting public comments by e-mail are provided below.

### **General Public Comments & Comments on District Board Business Items**

For general public comments and comments regarding specific CMO Board Business Items, all public comments must be received by e-mail no later than 12:00 p.m. on April 15, 2021. Comments received by this time will be read aloud by a staff member during the applicable agenda item, provided that such comments may be read within the normal three (3) minutes allotted to each speaker. Any portion of your comment extending past three (3) minutes may not be read aloud due to time restrictions. If a general public comment or comment on a business item is received after 12:00 p.m., efforts will be made to read your comment into the record. However, staff cannot guarantee that written comments received after 12:00 p.m. will be read. All written comments that are not read into the record will be made part of the meeting minutes, provided that such comments are received prior to the end of The Academies CMO Board meeting.

**\*Please be aware that any public comments received that do not specify a particular agenda item will be read aloud during the general public comment portion of the agenda.\***

The Academies CMO thanks you for your cooperation in advance. Our community's health and safety is our highest priority.

Here is quick summary of the basics:

- No public attendance. Public may only observe online.
- All public comments must be submitted by email: [dball@theacademiescharters.org](mailto:dball@theacademiescharters.org)
- Subject line of the email should state the commenter's name and the item they are commenting on.
- All general comments or comments on business items must be received by 12:00 p.m.
- Comments will be read aloud by staff (up to 3 minutes) if received on time.

If not timely but received by the end of the end of the meeting, comments will at least be included as part of the minutes for the meeting.

## **1 OPENING BUSINESS**

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### **1.1 CALL PUBLIC SESSION TO ORDER**

### **1.2 ADA ACCOMMODATIONS**

- 1.2.1 This meeting is held in an area accessible to the disabled. In compliance with the American Disabilities Act, if you need special assistance to participate in meetings, call (559) 429-4351 at CMO Home Office forty-eight (48) hours in advance of the meeting. Persons who are in need of disability-related modification or accommodation in order to participate in the Board meeting may make a request to Donya Ball at PO Box 1189, Visalia, CA 93279 or (559) 429-4351. Such a request should be in writing if possible or may be made in person or by telephone. The request should specify the nature of the accommodation or modification requested, including any auxiliary aids or services requested, and the name, address, and telephone number of the person making the request.
- 1.2.2 If documents are distributed to Board members concerning an agenda item within 72 hours of a regular Board meeting, at the same time the documents will be made available for public inspection. Interested members of the public may request to see the same documents by emailing the Superintendent ([dball@theacademiescharters.org](mailto:dball@theacademiescharters.org)), and the complete packet will be shared electronically.

### **1.3 IDENTIFY CLOSED SESSION TOPICS OF DISCUSSION**

### **1.4 PUBLIC COMMENT ON CLOSED SESSION TOPICS**

- 1.4.1 General public comment on any closed session item will be heard. The Board may limit individual comments to no more than 3 minutes and individual topics to 20 minutes. Please begin your comments by stating your name.

### **1.5 ADJOURN TO CLOSED SESSION**

## **2 CLOSED SESSION**

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- 2.1 **PERSONNEL (Government Code § 54957). It is the intention of this governing body to meet in closed-session to consider public employee**

**appointment/employment for the position of: Instructional Aides (SVA & BOA)**

### **3 REGULAR SESSION RECONVENED**

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#### **3.1 CALL PUBLIC SESSION TO ORDER**

#### **3.2 REPORT ACTION TAKEN IN CLOSED SESSION (if any)**

**3.3 General public comment on any school related topic may be heard at this time. The Board asks that any public comment on an item listed on tonight's agenda be addressed at the time the item comes up for discussion by the Board. Pursuant to Board Policy, the Board may limit individual comments to no more than 3 minutes and individual topics to 20 minutes. Please begin your comments by stating your name.**

### **4 CONSENT AGENDA**

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#### **4.1 ADMINISTRATIVE SERVICES**

- 4.1.1 Board Student Policy: 13-001 Education of Homeless Children and Youth Policy (Enc. No. 1)

[SP 13-001 Education for Homeless Children and Youth Policy \(YMC redline\).pdf](#)

- 4.1.2 Board Student Policy: 12-001 Education Records and Student Information Policy (Enc. No. 2)

[SP 12-001 Educational Records and Student Information \(YMC redline\).pdf](#)

- 4.1.3 Board Policy: 12-002 Suspension and Expulsion Policy (Enc. No. 3)

[BP 12-002 Suspension and Expulsion Policy \(YMC redline\).pdf](#)

#### **4.2 SUPERINTENDENT'S OFFICE**

- 4.2.1 Approval of Minutes of the board meeting on March 18, 2021 (Enc. No. 4)

[03182021 TACMO BOD DRAFT Meeting Minutes.pdf](#)

- 4.2.2 Approval of the March 2021 Check Register Report (Enc. No. 5)

[TACMO March 2021 Combined Board Check Register.pdf](#)

- 4.2.3 Donation Recognition (Enc. No. 6)

[March Donations.pdf](#)

- 4.2.4 Monthly Attendance Reports for BOA and SVA (Enc. No. 7)

[Month 8 Attendance Report SVA.pdf](#)

[Month 8 Attendance Report BOA.pdf](#)

### **5 PUBLIC RECOGNITION/PROCLAMATIONS/ACTION**

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- 5.1 **There are no Public Recognition/Proclamation/Action items to include this evening.**

## 6 **PROGRAM UPDATE & BOARD DEVELOPMENT**

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Presentation/Public Hearing/Public Comment/Board Discussion

### 6.1 **Program Update**

- 6.1.1 2021-2022 LCAP Goals & Actions (Enc. No. 8)

[ProgramUpdate1.pdf](#)

[ProgramUpdate2.pdf](#)

### 6.2 **Board Development**

- 6.2.1 There are no Board Development items to include this evening.

## 7 **COMMUNITY REPORTS**

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Presentation/Public Hearing/Public Comment/Board Discussion

### 7.1 **Board Member Report**

### 7.2 **Superintendent Report**

- 7.2.1 Blue Oak Academy Growth Plan (Enc. No. 9)

[Superintendent Report1.pdf](#)

[Superintendent Report2.pdf](#)

### 7.3 **Principal Report**

### 7.4 **Operations Director Report**

### 7.5 **Teacher Representative Report**

- 7.5.1 Curriculum & Instruction Update

## 8 **ADMINISTRATIVE PANEL RECOMMENDATIONS/ACTIONS**

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Review/Public Hearing/Public Input/Board Discussion/ACTION (as applicable)

- 8.1 **There are no Administrative Panel items to discuss this evening.**

## 9 **GENERAL AGENDA**

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Review/Public Hearing/Public Input/Board Discussion/ACTION (as applicable)

- 9.1 **Monthly Financials Presentation (Enc. No. 10) ACTION**

9.2 **End of Year One Time Compensation for Staff ACTION**

10 **ADJOURNMENT**

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10.1 **Request for future Board Agenda items**

10.2 **The next The Academies CMO board meeting: May 20, 2021 at 6:30 PM via Zoom.**

## THE ACADEMIES CHARTER MANAGEMENT ORGANIZATION

### EDUCATION FOR HOMELESS CHILDREN AND YOUTH POLICY

The Academies Charter Management Organization ("TACMO") Board of Directors and its schools, Sycamore Valley Academy and Blue Oak Academy ("School") desires to ensure that homeless children and youth are provided with equal access to its educational program, have an opportunity to meet the same challenging State academic standards, are provided a free and appropriate public education, are not stigmatized or segregated on the basis of their status as homeless, and to establish safeguards that protect homeless students from discrimination on the basis of their homelessness.

Information regarding this policy, including the educational rights of children and youth identified as homeless will be distributed to all students upon enrollment and once during the school year, provided to students who seek to withdraw from Sycamore Valley Academy or Blue Oak Academy, as well as other places where children, youth, and families who are homeless receive services, including family and youth shelters, motels, campgrounds, welfare departments, health departments, and other social service agencies. This policy is also available at the school's website.

#### Definition of Homeless Children and Youth

The term "*homeless children and youth*" means individuals who lack a fixed, regular and adequate nighttime residence and includes children and youth who (42 U.S.C. § 11434a):

1. Are sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason; are living in motels, hotels, trailer parks, or camping grounds due to the lack of alternative adequate accommodations; are living in emergency or transitional shelters; or are abandoned in hospitals;
2. Have a primary nighttime residence that is a public or private place not designed for or ordinarily used as regular sleeping accommodations for human beings;
3. Are living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations, or similar settings; and/or
4. Migratory children and unaccompanied youth (youth not in the physical custody of a parent or guardian) may be considered homeless if they meet the above definition of "homeless."

Homeless status is determined in cooperation with the parent or guardian. In the case of unaccompanied youth, status is determined by the School Liaison.

### **School Liaison**

The TACMO Superintendent designates the following staff persons as the School Liaison for homeless students (42 U.S.C. § 11432(g)(1)(J)(ii)):

The Sycamore Valley Academy Principal, Allan Benton, may be reached at [abenton@sycamorevalleyacademy.org](mailto:abenton@sycamorevalleyacademy.org) or 559-622-3236

The Blue Oak Academy Principal, Dana Stinson, may be reached at [dstinson@blueoakacademy.org](mailto:dstinson@blueoakacademy.org) or 559-730- 7422.

The School Liaison shall ensure that the following requirements are fulfilled by the School (42 U.S.C. § 11432(g)(6)):

1. Homeless students are identified by school personnel and through outreach and coordination activities with other entities and agencies.
2. Homeless students enroll in and have a full and equal opportunity to succeed at Sycamore Valley Academy or Blue Oak Academy.
3. Homeless students and families receive educational services for which they are eligible, including: services through Head Start programs (including Early Head Start programs) under the Head Start Act; early intervention services under part C of the Individuals with Disabilities Education Act ("IDEA"); any other preschool programs administered by Sycamore Valley Academy or Blue Oak Academy, if any; and referrals to health care services, dental services, mental health services, substance abuse services, housing services, and other appropriate services.
4. Parents/guardians are informed of the educational and related opportunities available to their children and are provided with meaningful opportunities to participate in the education of their children.
5. Public notice of the educational rights of homeless children is disseminated at places frequented by parents or guardians of such youths, and unaccompanied youths, including schools, shelters, public libraries, and soup kitchens, and in a manner and form understandable to the parents and guardians of homeless youth and unaccompanied youth.
6. Enrollment/admissions disputes are mediated in accordance with law, Sycamore Valley Academy or Blue Oak Academy charter, and Board policy.

7. Parents/guardians and any unaccompanied youth are fully informed of all transportation services, as applicable.
8. School personnel providing services receive professional development and other support.

The School liaison will coordinate with and seek support from the local district and county coordinator for the Education of Homeless Children and Youth, public and private service providers in the community, housing and placement agencies, local liaisons in neighboring districts, and other organizations and agencies. Coordination may include conducting outreach and training through those agencies. Both public and private agencies will be encouraged to support the local liaison and Sycamore Valley Academy and Blue Oak Academy in implementing this policy.

9. Unaccompanied youth are enrolled in school; have opportunities to meet the same challenging State academic standards as the State establishes for other children and youth; and are informed of their status as independent students and that the youths may obtain assistance from the School Liaison to receive verification of such status for the purposes of the Free Application for Federal Student Aid.

The California Department of Education publishes a list of the contact information for the Homeless Education Liaisons in the state, which is available at: <https://www.cde.ca.gov/sp/hs/>

### **Enrollment**

Sycamore Valley Academy or Blue Oak Academy shall immediately admit/enroll the student for which the School is a School of Origin. "School of Origin" means the school that the child or youth attended when permanently housed or the school in which the child or youth was last enrolled.

Sycamore Valley Academy or Blue Oak Academy shall also immediately enroll a homeless youth who seeks to enroll in the School, if the youth would otherwise be eligible to attend and subject to the School's capacity and pursuant to the procedures stated in the Sycamore Valley Academy or Blue Oak Academy charter and Board policy. A homeless youth who is enrolled will have the right to attend classes and participate fully in school activities, including extracurricular activities.

The youth shall be immediately enrolled even if the student lacks records normally required for enrollment (such as previous academic records, records of immunizations, other required health records, proof of residency) or has missed application or enrollment deadlines during any period of homelessness. Records will immediately be requested from the previous school. (42 U.S.C. § 11432(g)(3)(C); Education Code Section 48850(a)(3)(A).)

If the student needs to obtain immunizations or does not possess immunization or other medical records, the Superintendent or designee shall refer the parent/guardian to the School Liaison.

The School Liaison shall assist the parent/guardian in obtaining the necessary immunizations or records for the student. (42 U.S.C. § 11432(g)(3)(C).)

A homeless youth may remain in the student's school of origin for the entire period for which the youth is homeless. If a youth obtains permanent housing during an academic year, the youth will be permitted to remain in the school of origin through the end of the academic year.

### **Enrollment Disputes**

If a dispute arises over admissions/enrollment, the student shall be immediately admitted (subject to the School's capacity and pursuant to the procedures stated in the School's charter and Board policy), pending final resolution of the dispute, including all available appeals. (42 U.S.C. § 11432(g)(3)(E).)

The parent/guardian shall be provided with a written explanation of the admission/enrollment decision, including an explanation of the parent/guardian's right to appeal the decision. The parent/guardian shall also be referred to the School Liaison. (42 U.S.C. § 11432(g)(3)(E).)

The School Liaison shall carry out the Board-adopted dispute resolution and complaint process as expeditiously as possible after receiving notice of the dispute. (42 U.S.C. § 11432(g)(3)(E).)

### **Comparable Services**

Each homeless child or youth shall promptly be provided services comparable to services offered to other students in Sycamore Valley Academy or Blue Oak Academy such as (42 U.S.C. § 11432(g)(4)):

- Transportation services
- Title I, Part A services - Children and youth identified as homeless are automatically eligible for Title I, Part A services
- Educational services for which the child or youth meets eligibility criteria, such as educational programs for students with disabilities and educational programs for students with limited English proficiency
- Programs in vocational and technical education
- Programs for gifted and talented students
- Before- and after-school programs
- Free meals - On the day a child or youth identified as homeless enrolls in school, Sycamore Valley Academy or Blue Oak Academy must submit the student's name to its food service program coordinator for immediate eligibility.

### **Transportation**

In the event that Sycamore Valley Academy or Blue Oak Academy provides transportation services to all Sycamore Valley Academy or Blue Oak Academy students, Sycamore Valley Academy or Blue Oak Academy shall provide comparable transportation services to each homeless child or youth attending Sycamore Valley Academy or Blue Oak Academy, as noted above. (42 U.S.C. § 11432(g)(4).)

If the Sycamore Valley Academy or Blue Oak Academy does not otherwise provide transportation services to all Sycamore Valley Academy or Blue Oak Academy students, Sycamore Valley Academy or Blue Oak Academy shall ensure that transportation is provided for homeless students to and from Sycamore Valley Academy or Blue Oak Academy, at the request of the parent or guardian (or School Liaison), if Sycamore Valley Academy or Blue Oak Academy is the student's school of origin. (42 U.S.C. § 11432(g)(1)(J).) Transportation provided by Sycamore Valley Academy or Blue Oak Academy will be adequate and appropriate for the Student's situation, but Sycamore Valley Academy or Blue Oak Academy does not commit to any one method of transportation for all youth.

### **Professional Development**

All administrators, teachers and employees of Sycamore Valley Academy or Blue Oak Academy will be provided professional development on the identification, services, and sensitivity necessary when dealing with homeless children and youth. (42 U.S.C. § 11433(d)(3).) All identified or suspected homeless children and youth will be referred to the School Liaison.

### **Acceptance of Course Work**

The School will accept any coursework satisfactorily completed at any public school, a juvenile court school, a school in a country other than the United States, and/or a nonpublic, nonsectarian school or agency by a homeless student.

The School will provide homeless students credit for the partial completion of courses taken while attending a public school, a juvenile court school, a school in a country other than the United States, and/or a nonpublic, nonsectarian school or agency. If the student did not complete the entire course, the School shall not require the student to retake the portion of the course the student completed unless the School, in consultation with the holder of educational rights for the student, finds that the student is reasonably able to complete the requirements in time to graduate from high school. When partial credit is awarded in a particular course, the homeless student shall be enrolled in the same or equivalent course, if applicable, so that the student may continue and complete the entire course. These students shall not be prevented from taking or retaking a course to meet California State University or the University of California admission eligibility requirements.

### **Notice**

For any homeless student who seeks enrollment at the School, written notice will be provided to the parent/guardian at the time of enrollment and while the student is enrolled at the School in alignment with the law. (42 U.S.C. § 11432(e)(3)(C).)

### **Annual Policy Review**

The School shall annually review and revise any policies that may act as barriers to the identification of homeless children and youths or the enrollment of homeless children and youths at the School. In reviewing and revising such policies, consideration shall be given to issues concerning transportation, immunization, residency, birth certificates, school records and other documentation, and guardianship. Special attention shall be given to ensuring the identification, enrollment, and attendance of homeless children and youths who are not currently attending school.

This policy revision was formally adopted at a meeting of The Academies Charter Management Organization Board of Directors on April 15, 2021.

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Alex Tietjen, Board Secretary

## THE ACADEMIES CHARTER MANAGEMENT ORGANIZATION

### EDUCATIONAL RECORDS AND STUDENT INFORMATION

The Academies Charter Management Organization ("TACMO") Board of Directors, a California nonprofit public benefit corporation operating Sycamore Valley Academy and Blue Oak Academy ("School"), adopts this Educational Records and Student Information Policy to apply to all educational records and student information maintained by TACMO.

#### I. DEFINITIONS

##### 1. Education Record

An education record is any information recorded in any way, including, but not limited to, handwriting, print, computer media, video or audio tape, film, microfilm, and microfiche that directly relates to a student and is maintained by TACMO or by a party action for TACMO. Such information includes but is not limited to:

- a. Date and place of birth; parent and/or guardian's address, mother's maiden name and where the parties may be contacted for emergency purposes.
- b. Grades, test scores, courses taken, academic specializations and school activities;
- c. Special education records;
- d. Disciplinary records;
- e. Medical and health records;
- f. Attendance records and records of past schools attended;
- g. Personal information such as, but not limited to, a student's name, the name of a student's parent, or other family member, student identification numbers, social security numbers, photographs, biometric record or any other type of information that aids in identification of a student.

An education record does not include any of the following:

- a. Records that are kept in the sole possession of the maker, are used only as a personal memory aid, and are not accessible or revealed to any other person except a temporary substitute for the maker of the record;

- b. Records maintained by a law enforcement unit of TACMO that were created by that law enforcement unit for the purpose of law enforcement;
- c. In the case of a person who is employed by TACMO, but not in attendance at a TACMO school, records made and maintained in the normal course of business, relate exclusively to the individual in that individual's capacity as an employee; and are not available for any other purpose;
- d. Records of a student who is 18 years of age or older, or is attending an institution of postsecondary education, that are:
  - a) made or maintained by a physician, psychiatrist, psychologist, or other recognized professional or paraprofessional acting in their professional capacity or assisting in a paraprofessional capacity;
  - b) made, maintained, or used only in connection with treatment of the student; and c) disclosed only to individuals providing the treatment. For the purpose of this definition, "treatment" does not include remedial educational activities or activities that are part of the program of instruction at TACMO; or
- e. Records that only contain information about an individual after the individual is no longer a student at TACMO.
- f. Grades on peer-graded papers before they are collected and recorded by a teacher.

## 2. Personally Identifiable Information

Personally identifiable information ("PII") is information about a student that is contained in their education records that cannot be disclosed without compliance with the requirements of Family Educational Rights and Privacy Act of 2001 ("FERPA"). PII includes, but is not limited to: a student's name; the name of a student's parent or other family member; the address of a student or student's family; a personal identifier, such as the student's Social Security number, student number or biometric record; other indirect identifiers, such as the student's date of birth, place of birth, and mother's maiden name; other information that, alone or in combination, is linked or linkable to a specific student that would allow a reasonable person in the school community, who does not have personal knowledge of the relevant circumstances, to identify the student with reasonable certainty; or information requested by a person who TACMO reasonably believes

knows the identity of the student to whom the education record relates.

3. Directory Information

Charter School may disclose the PII that it has designated as directory information, consistent with the terms of the annual notice provided by TACMO pursuant to the FERPA (20 U.S.C. § 1232g). TACMO has designated the following information as directory information:

1. Student's name
2. Student's address
3. Parent/guardian's address
4. Telephone listing
5. Student's electronic mail address
6. Parent/guardian's electronic mail address
7. Photograph
8. Date and place of birth
9. Dates of attendance
10. Grade level
11. Major field of study
12. Participation in officially recognized activities and sports
13. Weight and height of members of athletic teams
14. Degrees, honors and awards received
15. The most recent educational agency or institution attended
16. Student ID number, user ID, or other unique personal identifier used to communicate in electronic systems that cannot be used to access education records with a PIN, password, etc. (A student's SSN, in whole or in part, cannot be used for this purpose.)

4. Parent

Parent means a parent of a student and includes a natural parent, a guardian, or an individual acting as a parent in the absence of a parent or a guardian.

5. Eligible Student

Eligible student means a student who has reached sixteen eighteen (186) years of age or older or having completed the 10th grade.

6. School Official

A school official is a person employed by Charter School as an administrator, supervisor, instructor, or support staff member (including health or medical staff and law enforcement unit personnel) or a person serving on the Board of Directors

of TACMO. A school official also may include a volunteer for TACMO or an independent contractor of TACMO or other party who performs an institutional service or function for which TACMO would otherwise use its own employees and who is under the direct control of TACMO with respect to the use and maintenance of PII from education records, such as an attorney, auditor, medical consultant, or therapist; a parent or student volunteering to serve on an official committee, such as a disciplinary or grievance committee; or a parent, student, or other volunteer assisting another school official in performing their tasks.

#### 7. Legitimate Educational Interest

A school official has a legitimate educational interest if the official needs to review an education record in order to fulfill their professional responsibility.

### II. DISCLOSURE OF DIRECTORY INFORMATION

At the beginning of each school year, TACMO shall provide parents and eligible students with a notice containing the following information : 1) The type of PII it designates as directory information ; 2) The parent's or eligible student's right to require that TACMO not release any or all of those types of information about the student as directory information without obtaining prior written consent from the parent or eligible student; and 3) The period of time within which a parent or eligible student must notify TACMO in writing of the categories of "directory information" that it may not disclose without the parent's or eligible student's prior written consent. TACMO will continue to honor a valid request to opt out of the disclosure of a former student's directory information made while the former student was in attendance unless the student rescinds the opt out request.. The notice shall be in the form of a letter or shall be printed in the TACMO newsletter. Within fourteen (14) days of sending notice, any parent(s) who does not want his/her child's directory information made public without prior written consent must inform TACMO in writing. This parental notice must identify what student directory information (any or all) is subject to the prior written consent requirement.

### III. ANNUAL NOTIFICATION TO PARENTS AND ELIGIBLE STUDENTS

At the beginning of each school year, in addition to the notice required for directory information, TACMO shall provide eligible students currently in attendance and parents of students currently in attendance with a notice of their rights under FERPA. The notice shall inform the parents and eligible students that they have the right to:

1. Inspect and review the student's education records;
2. Seek amendment of the student's education records that the parent or eligible student believes to be inaccurate, misleading or otherwise in violation of the student 's privacy rights;

3. Consent to disclosures of PII contained in the student's education records, except to the extent that disclosure is permitted without prior written consent and pursuant to FERPA;
4. File with the U.S. Department of Education a complaint concerning alleged failures by TACMO to comply with the requirements of FERPA and its promulgated regulations; and
5. Request that TACMO not release student names, addresses and telephone listings to military recruiters or institutions of higher education without prior written parental consent.

The notice must also include the following:

1. The procedure for exercising the right to inspect and review educational records;
2. The procedure for requesting amendment of records;
3. A statement that TACMO forwards education records to other agencies or institutions that have requested the records and in which the student seeks or intends to enroll or is already enrolled so long as the disclosure is for purposes related to the student's enrollment or transfer; and
4. The criteria for determining who constitutes a school official and what constitutes a legitimate educational interest.

#### IV. PARENTAL AND ELIGIBLE STUDENT RIGHTS RELATING TO EDUCATION RECORDS

Parents and eligible students have the right to review the student's education records. In order to do so, parents and eligible students shall submit a request to review education records in writing to the Principal/Superintendent. Within five (5) business days, TACMO shall comply with the request. If circumstances effectively prevent the parent or eligible student from exercising the right to inspect and review the education records, TACMO will provide the parent or eligible student with a copy of the requested records or make other arrangements for inspection and review of the requested records.

##### 1. Copies of Education Records

TACMO will provide copies of requested documents within five (5) business days of a written request for copies. TACMO may charge reasonable fees for copies it provides to parents or eligible students. However, no charge shall be made for furnishing (1) up to two transcripts of former students' records or (2) up to two verifications of various records of former students. The charge will not include a fee to search for or to retrieve the education records.

##### 2. Request for Amendment to Education Records

Following the inspection and review of a student's education record, a parent

or eligible student may file a written request with the Principal to correct or remove any information in the student's education record that is any of the following:

- a. Inaccurate.
- b. Misleading.
- c. In violation of the privacy rights of the student.

Charter School will respond within thirty (30) days of the receipt of the request to amend. TACMO's response will be in writing and if the request for amendment is denied, TACMO will set forth the reason for the denial and inform the parent or eligible student of their right to a hearing challenging the content of the education record.

If the Principal sustains any or all of the allegations, the Principal must order the correction or the removal and destruction of the information. The Principal or designee must then inform the parent or eligible student of the amendment in writing.

### 3. Hearing to Challenge Education Record

If TACMO denies a parent or eligible student's request to amend an education record, the parent or eligible student may, within thirty (30) days of the denial, request in writing that the parent or eligible student be given the opportunity for a hearing to challenge the content of the student's education record on the grounds that the information contained in the education record is inaccurate, misleading or in violation of the privacy rights of the student.

The Board Chair may convene a hearing panel to assist in making determinations regarding educational record challenges provided that the parent has given written consent to release information from the student's records to the members of the panel convened. The hearing panel shall consist of the following persons:

- a. The principal or designee of a public school other than the public school at which the record is on file;
- b. A certificated Charter School employee; and
- c. A parent appointed by the Superintendent or by the Board Chair, depending upon who convenes the panel.

The hearing to challenge the education record shall be held within thirty (30) days of the date of the request for a hearing. Notice of the date, time and place of the hearing will be sent by TACMO to the parent or eligible student no later than twenty (20) days before the hearing.

The principal or designee of a public school will serve as the chairman and shall not be required to use formal rules of evidence or procedure. The parent or eligible student will be given a full and fair opportunity to present evidence relevant to the issues relating to the challenge to the education record. The parent or eligible student may also, at their own expense, be assisted or represented by one or more individuals of his/her choice, including an attorney. The decision of the Board Chair will be based solely on the evidence presented at the hearing and is final. Within thirty (30) days after the conclusion of the hearing, TACMO's decision regarding the challenge will be made in writing and will include a summary of the evidence and the reasons for the decision.

If, as a result of the hearing, TACMO decides that the information is inaccurate, misleading or in violation of the privacy rights of the student, it will amend the record accordingly and inform the parent or eligible student of the amendment in writing.

If, as a result of the hearing, TACMO decides that the information in the education record is not inaccurate, misleading or otherwise in violation of the privacy rights of the student, it shall inform the parent or eligible student of the right to place a statement in the record commenting on the contested information in the record or stating why they disagree with the decision of TACMO, or both. If TACMO places a statement by the parent or eligible student in the education records of a student, it will maintain the statement with the contested part of the record for as long as the record is maintained and disclose the statement whenever it discloses the portion of the record to which the statement relates.

#### V. DISCLOSURE OF EDUCATION RECORDS AND DIRECTORY INFORMATION

TACMO must have a signed and dated written consent from the parent or eligible student before releasing any non-directory information from a student's education record except as provided below. The written permission must specify the records that may be disclosed, the purpose of the disclosure and the party or class of parties to whom the disclosure may be made. When disclosure is made pursuant to written permission, the parent or eligible student may request a copy of the disclosed records and TACMO shall provide the requestor with a copy of the records disclosed upon request. Signed and dated written consent may include a record and signature in electronic form if it identifies and authenticates a particular person as the source of the electronic consent and indicates such person's approval of the information contained in the electronic consent.

TACMO will only disclose PII on the condition that the receiving party not disclose the

information to any party without the prior written consent of the parent or eligible student and that the receiving party use the information for the purposes for which the disclosure was made. This restriction does not apply to disclosures that fall within the disclosure exceptions listed below and TACMO must maintain the appropriate records related to these disclosure exceptions, as described below. Except for disclosures pursuant to a warrant, judicial order or lawfully issued subpoena, or directory information or to parents or eligible students, TACMO will inform a receiving party of the requirement that the party not disclose the information to any other party without the prior written consent of the parent or eligible student and that the receiving party use it for the purpose for which the disclosure was made. Note specifically that TACMO will not release information to third parties for immigration enforcement purposes by law or court order.

TACMO will disclose education records, without prior written consent of the parent or eligible student, to the following parties:

4. School officials who have a legitimate educational interest as defined by 34 Code of Federal Regulations ("C.F.R"). Part 99;
5. Other schools to which a student seeks or intends to enroll so long as the disclosure is for purposes related to the student's enrollment or transfer. When a student transfers schools, TACMO will mail the original or a copy of a student's cumulative file to the receiving district or private school within ten (10) school days following the date the request is received from the public school or private school where the student intends to enroll. TACMO will make a reasonable attempt to notify the parent or eligible student of the request for records at their last known address, unless the disclosure is initiated by the parent or eligible student. Additionally, TACMO will give the parent or eligible student, upon request, a copy of the record that was disclosed and give the parent or eligible student, upon request, an opportunity for hearing pursuant to Section (IV)(3) above;
6. Certain government officials listed in 20 U.S.C. § 1232g(b)(1) in order to carry out lawful functions;
7. Appropriate parties in connection with a student's application for, or receipt of, financial aid if it is necessary to determine eligibility, amount of aid, conditions for aid or enforcing the terms and conditions of the aid;
8. Organizations conducting certain studies for TACMO in accordance with 20 U.S.C. § 1232g(b)(1)(F);
9. Accrediting organizations in order to carry out their accrediting functions;
10. Parents of a dependent student as defined in section 152 of the Internal Revenue Code of 1986;
11. Individuals or entities, in compliance with a judicial order or lawfully issued

subpoena. Subject to the exceptions found in 34 C.F.R. § 99.31(a)(9)(i), reasonable effort must be made to notify the parent or eligible student of the order or subpoena in advance of compliance, so that the parent or eligible student may seek a protective order;

12. Persons who need to know in cases of health and safety emergencies;
13. State and local authorities, within a juvenile justice system, pursuant to specific State law.
14. A foster family agency with jurisdiction over a currently enrolled or former student, a short-term residential treatment program staff responsible for the education or case management of a student, and/or a caregiver (regardless of whether the caregiver has been appointed as the student's educational rights holder) who has direct responsibility for the care of the student, including a certified or licensed foster parent, an approved relative or nonrelated extended family member, or a resource family, may access the current or most recent records of grades, transcripts, attendance, discipline, and online communication on platforms established by TACMO for student and parents, and any individualized education program ("IEP") or Section 504 plan that may have been developed or maintained by TACMO; and/or
15. A victim of an alleged perpetrator of a crime of violence or a non-forcible sex offense. The disclosure may only include final results of the disciplinary proceedings conducted by TACMO with respect to that alleged crime or offense. TACMO may disclose the final results of the disciplinary proceeding, regardless of whether TACMO concluded a violation was committed.

#### V. RECORD KEEPING REQUIREMENTS

TACMO will maintain a record of each request for access to and each disclosure of PII from the education records of each student for as long as the records are maintained. For each request, the record must include the following information: the parties who have requested or received the information and the legitimate interests the parties had in requesting or obtaining the information.

For disclosures of PII to institutions that make disclosures of the information on behalf of TACMO in accordance with 34 C.F.R. 99.33(b), the record must include the names of the additional parties to which the receiving party may disclose the information on behalf of TACMO and the legitimate interests that each of the additional parties has in requesting or obtaining the information.

These record keeping requirements do not apply to requests from or disclosure to parents and eligible students, TACMO officials with a legitimate purpose of inspecting the records, a party with written consent from the parent or eligible student, a party seeking directory

information, or a party seeking or receiving the records as directed by a court order or subpoena.

The records relating to disclosures of PII may be inspected by parents and eligible students, TACMO officials (or their assistants) responsible for the custody of the records, and parties authorized by regulations for the purpose of auditing the recordkeeping procedures of TACMO.

Student cumulative records may not be removed from the premises of TACMO, unless the individual removing the record has a legitimate educational interest, and is authorized by the Superintendent, or by a majority of a quorum of the Board of Directors at a duly agendized meeting. Employees who remove student cumulative records or other student records from the TACMO premises without a legitimate educational interest and authorization may be subject to discipline. Employees are permitted to take student work-product, or other appropriate student records, off premises without authorization for legitimate academic purposes (e.g. grading work-product, assigning credit, reviewing materials for classroom discussion, etc.).

#### VI. COMPLAINTS

Parents and eligible students have the right to file a complaint with the U.S. Department of Education concerning alleged failures by TACMO to comply with the requirements of FERPA. The name and address of the Office that administers FERPA is:

Student Privacy Policy Office  
U.S. Department of Education 400  
Maryland Avenue. S.W. Washington,  
D.C. 20202-5920

This policy revision was formally adopted at a meeting of The Academies Charter Management Organization Board of Directors on April 15, 2021.

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Alex Tietjen, Board Secretary

## THE ACADEMIES CHARTER MANAGEMENT ORGANIZATION

### STUDENT SUSPENSION AND EXPULSION POLICY

This Student Suspension and Expulsion Policy has been established in order to promote learning and protect the safety and well-being of all students at charter schools within The Academies Charter Management Organization ("TACMO"). In creating this policy, the Charter Management Organization has reviewed Education Code Section 48900 *et seq.* which describes the non-charter schools' list of offenses for which a student may be suspended or expelled and procedures governing those suspensions and expulsions 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.* The Charter Management Organization 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 TACMO'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 charters so long as the amendments comport with legal requirements. TACMO and its charter school staff shall enforce disciplinary policies and procedures fairly and consistently among all students.

TACMO administration shall ensure that students and their parents/guardians are notified in writing upon enrollment of all discipline policies and procedures. This Policy and its Procedures will be printed and distributed annually as part of the Family Handbook and will clearly describe discipline expectations. The notice shall also state that these Policy and Administrative Procedures are available on request at the Superintendent's office, or may be available for download from TACMO's website.

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 the Policy, corporal punishment does not include an employee's use of force that is reasonable and necessary to protect the employee, students, staff or other persons or to prevent damage to school property.

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 this policy and its procedures are available upon request at the Principal'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 TACMO 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. TACMO will follow Section 504, the IDEA, and 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 TACMO 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 charter school of TACMO or at any other school or a TACMO-sponsored event at anytime including but not limited to:

- a) while on school grounds;
- b) while going to or coming from school;
- c) during the lunch period, whether on or off the school campus;
- d) during, going to, or coming from a school-sponsored activity.

### **B. Enumerated Offenses**

Discretionary Suspension Offenses. Students may be suspended when it is determined the student:

1. Caused, attempted to cause, or threatened to cause physical injury to another person.
2. Willfully used force or violence upon the person of another, except self-defense.
3. Unlawfully possessed, used, sold or otherwise furnished, or was under the influence of any controlled substance, as defined in Health and Safety Code 11053-11058, alcoholic beverage, or intoxicant of any kind.
4. Unlawfully offered, arranged, or negotiated to sell any controlled substance as defined in Health and Safety Code 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.
5. Committed or attempted to commit robbery or extortion.
6. Caused or attempted to cause damage to school property or private property, which includes but is not limited to, electronic files and databases.

7. Stole or attempted to steal school property or private property, which includes but is not limited to, electronic files and databases.
8. Possessed or used tobacco or any 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 lawful use of a student's own prescription products by a student.
9. Committed an obscene act or engaged in habitual profanity or vulgarity.
10. Unlawfully possessed or unlawfully offered, arranged, or negotiated to sell any drug paraphernalia, as defined in Health and Safety Code Section 11014.5.
11. Knowingly received stolen school property or private property, which includes but is not limited to, electronic files and databases.
12. 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.
13. Committed or attempted to commit a sexual assault as defined in Penal Code 261, 266c, 286, 288, 288a or 289, or committed a sexual battery as defined in Penal Code 243.4.
14. 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.
15. Unlawfully offered, arranged to sell, negotiated to sell, or sold the prescription drug Soma.
16. Engaged in or attempted to engage in hazing. For the purposes of this Policy, "hazing" means a method of initiation or preinitiation into a student organization or body, whether or not the organization or body is officially recognized by an educational institution, which is likely to cause serious bodily injury or personal degradation or disgrace resulting in physical or mental harm to a former, current, or prospective student. For purposes of this section, "hazing" does not include athletic events or school-sanctioned events.
17. 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 **their** own safety or for **their** immediate family's safety, or for the protection of school property, or the personal property of the person threatened or their immediate family.

18. 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 **provision** shall apply to **students** in any of grades 4 to 12, inclusive.
19. 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 **provision** shall apply to **students** in any of grades 4 to 12, inclusive.
20. 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 **provision** shall apply to **students** in any of grades 4 to 12, inclusive.
21. Engaged in an act of bullying, including, but not limited to, bullying committed by means of an electronic act.
  - a) "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.
- b) "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, 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 student for the purpose of having one or more of the effects listed in subparagraph (1) above. "Credible impersonation" means to knowingly and without consent impersonate a student for the purpose of bullying the student and such that another student would reasonably believe, or has reasonably believed, that the student was or is the student who was impersonated.
    - (c) Creating a false profile for the purpose of having one or more of the effects listed in subparagraph (1) above. "False profile" means a profile of a fictitious student or a profile using the likeness or attributes of an actual student other than the student who created the false profile.
  - iii. An act of 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.

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.

22. A student who aids or abets, as defined in Section 31 of the Penal Code, the infliction or attempted infliction of physical injury to another person may be subject to suspension, but not expulsion, except that a student who has been adjudged by a juvenile court to have committed, as an aider and abettor, a crime of physical violence in which the victim suffered great bodily injury or serious bodily injury shall be subject to discipline pursuant to subdivision (1)(a).
23. 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 Superintendent or Principal or designee’s concurrence.

Non-Discretionary Suspension Offenses: Students must be suspended and recommended for expulsion when it is determined the student:

1. 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 students had obtained written permission to possess the item from a certificated school employee, with the Superintendent or Principal or designee’s concurrence.
2. Brandished a knife at another person.

3. Unlawfully sold a controlled substance listed in Health and Safety Code Section 11053, et seq.
4. 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

Discretionary Expellable Offenses: Students may be recommended for expulsion when it is determined the student:

- a) Caused, attempted to cause, or threatened to cause physical injury to another person.
- b) Willfully used force or violence upon the person of another, except self-defense.
- c) Unlawfully possessed, used, or otherwise furnished, or was under the influence of any controlled substance, as defined in Health and Safety Code Sections 11053-11058, alcoholic beverage, or intoxicant of any kind.
- d) Unlawfully offered, arranged, or negotiated to sell 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 a student's own prescription products by a student.

- i) Committed an obscene act or engaged in habitual profanity or vulgarity.
- j) Unlawfully possessed or unlawfully offered, arranged, or negotiated to sell any drug paraphernalia, as defined in Health and Safety Code Section 11014.5.
- k) Knowingly received stolen school property or private property, which includes but is not limited to, electronic files and databases.
- l) Possessed an imitation firearm, i.e.: a replica of a firearm that is so substantially similar in physical properties to an existing firearm as to lead a reasonable person to conclude that the replica is a firearm.
- m) Harassed, threatened, or intimidated a student who is a complaining witness or 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 policy, "hazing" means a method of initiation or preinitiation into a student organization or body, whether or not the organization or body is officially recognized by an educational institution, which is likely to cause serious bodily injury or personal degradation or disgrace resulting in physical or mental harm to a former, current, or prospective student. For purposes of this policy, "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 policy, "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 their own safety or for their 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 their 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 provision shall apply to students in any of grades 4 to 12, inclusive.
- r) Caused, attempted to cause, threatened to cause or participated in an act of hate violence, as defined in subdivision (e) of Section 233 of the Education Code. This provision shall apply to students in any of grades 4 to 12, inclusive.
- s) Intentionally harassed, threatened or intimidated school personnel or volunteers and/or a student or group of students to the extent of having the actual and reasonably expected effect of materially disrupting class work, creating substantial disorder and invading the rights of either school personnel or volunteers and/or student(s) by creating an intimidating or hostile educational environment. This provision shall apply to students in any of grades 4 to 12, inclusive.
- t) Engaged in an act of bullying, including, but not limited to, bullying committed by means of an electronic act.
  - 1) "Bullying" means any severe or pervasive physical or verbal act or conduct, including communications made in writing or by means of an electronic act, and including one or more acts committed by a student or group of students which would be deemed hate violence or harassment, threats, or intimidation, which are directed toward one or more students that has or can be reasonably predicted to have the effect of one or more of the following:
    - i. Placing a reasonable student (defined as a student, including, but is not limited to, a student with exceptional needs, who exercises average care, skill, and judgment in conduct for a

person of 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 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.
  - (b) Creating a credible impersonation of another actual student for the purpose of having one or more of the effects listed in subparagraph (1) above. "Credible impersonation" means to knowingly and without consent impersonate a student for the purpose of bullying the student and such that another student would reasonably believe, or has reasonably believed, that the student was or is the student who was impersonated.
  - (c) Creating a false profile for the purpose of having one or more of the effects listed in subparagraph (1) above. "False profile" means a profile of a fictitious student or a profile using the likeness or attributes of an actual student other than the student who created the false profile.

iii. An act of 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 student who aids or abets, as defined in Section 31 of the Penal Code, the infliction or attempted infliction of physical injury to another person may be subject to suspension, but not expulsion, except that a student who has been adjudged by a juvenile court to have committed, as an aider and abettor, a crime of physical violence in which the victim suffered great bodily injury or serious bodily injury shall be subject to discipline pursuant to subdivision (3)(a)-(b).

v) Possessed, sold, or otherwise furnished any knife 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 Superintendent or designee’s concurrence.

4. Non-Discretionary Expellable Offenses: Students must be recommended for expulsion when it is determined pursuant to the procedures below that the student:

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The Charter School will use the following definitions:

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

- a) Suspension shall be preceded, if possible, by a conference conducted by the Principal or designee with the student and the student's parent/guardian and, whenever practical, the teacher, supervisor or school employee who referred the student to the Principal.
- b) The conference may be omitted if the Principal 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 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.
- c) At the conference, the student shall be informed of the reason for the disciplinary action and the evidence against the student and shall be given the opportunity to present their version and evidence in their defense, in accordance with Education Code Section 47605(c)(5)(J)(i). This conference shall be held within two (2) school days, unless the student waives this right or is physically unable to attend for any reason including, but not limited to, incarceration or hospitalization.
- d) No penalties may be imposed on a student for failure of the student's parent or guardian to attend a conference with school officials. Reinstatement of the suspended student shall not be contingent upon attendance by the student's parent or guardian at the conference.

#### 2. Notice to Parents/Guardians

At the time of the suspension, the Principal 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 as well as the date the student may return to school following the suspension. In addition, the notice may also state the time when the student may return to school. If school officials wish to ask the parent/guardian to confer regarding matters pertinent to the suspension, the notice may request that the parent/guardian respond to such requests without delay.

### 3. Suspension Time Limits/Recommendation for Expulsion

Suspensions, when not including a recommendation for expulsion, shall not exceed five (5) consecutive school days per suspension.

Upon a recommendation of Expulsion by the Principal or designee, the student and the student's parent/guardian or representative will be invited to a conference to determine if the suspension for the student should be extended pending an expulsion hearing. In such instances when the Charter School has determined a suspension period shall be extended, such extension shall be made only after a conference is held with the student or the student's parents, unless the student and the student's parent/guardian fail to attend the conference.

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

### 4. Homework Assignments During Suspension

In accordance with Education Code Section 47606.2(a), upon the request of a parent, a legal guardian or other person holding the right to make education decisions for the 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 TACMO Board of Directors following a hearing before it or by the TACMO Board of Directors upon the recommendation of an neutral and impartial Administrative Panel to be assigned by the TACMO 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 student nor a member of the TACMO 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 Superintendent or designee determines that the student 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 TACMO Board of Directors for a final decision whether to expel. The hearing shall be held in closed session (complying with all student confidentiality rules under the Family Educational Rights and Privacy Act "FERPA") unless the student 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 student. 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 TACMO's disciplinary rules which relate to the alleged violation;
4. Notification of the student's or parent/guardian's obligation to provide information about the student's status at the school to any other school district or school to which the student seeks enrollment;
5. The opportunity for the student and/or the student's parent/guardian to appear in person or to employ and be represented by counsel or a non-attorney advisor;
6. The right to inspect and obtain copies of all documents to be used at the hearing;
7. The opportunity to confront and question all witnesses who testify at the hearing;
8. The opportunity to question all evidence presented and to present oral and documentary evidence on the student's behalf including witnesses.

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

TACMO 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 TACMO or the hearing officer. Copies of these sworn declarations, edited to delete the name and identity of the witness, shall be made available to the student.

1. The complaining witness in any sexual assault or battery case must be provided with a copy of the applicable disciplinary rules and advised of their right to (a) receive five (5) calendar days' notice of their scheduled testimony, (b) have up to two (2) adult support persons of their choosing present in the hearing at the time the complaining witness testifies, which may include a parent, guardian, or legal counsel, and (c) elect to have the hearing closed while testifying.
2. TACMO 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 the complaining witness 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 the complaining witness 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 the complaining witness to the witness stand.
7. If one or both of the support persons is also a witness, TACMO must present evidence that the witness' presence is both desired by the witness and will be helpful to TACMO. 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 **their** discretion to remove a person from the hearing whom **they believe** is prompting, swaying, or influencing the witness.

8. The testimony of the support person shall be presented before the testimony of the complaining witness and the complaining witness shall be excluded from the courtroom during that testimony.
9. Especially for charges involving sexual assault or battery, if the hearing is to be conducted in public at the request of the **student** being expelled, the complaining witness shall have the right to have **their** 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 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 TACMO Board of Directors, 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 student, 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.

### **Expulsion Decision**

The decision of the Administrative Panel shall be in the form of written findings of fact and a written recommendation to the TACMO Board of Directors who will make a final determination regarding the expulsion. The TACMO 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 TACMO Board of Directors 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 their previous 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

#### I. Written Notice to Expel

The Superintendent or designee following a decision of the TACMO Board of Directors to expel shall send written notice of the decision to expel, including the TACMO Board of Directors' adopted findings of fact, to the student and student's parent/guardian. This notice shall also include the following:

1. Notice of the specific offense committed by the student;
2. 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 TACMO.

The Superintendent or designee shall send a copy of the written notice of the decision to expel to the District. This notice shall include the following:

1. The student's name
2. The specific expellable offense committed by the student

#### J. Disciplinary Records

TACMO shall maintain records of all student suspensions and expulsions at TACMO. Such records shall be made available to the District upon request.

#### K. No Right to Appeal

The student shall have no right of appeal from expulsion from TACMO as the TACMO Board of Directors' decision to expel shall be final.

L. Expelled Students/Alternative Education

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

M. Rehabilitation Plans

Students who are expelled from TACMO shall be given a rehabilitation plan upon expulsion as developed by the TACMO Board of Directors 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 (1) year from the date of expulsion when the student may reapply to TACMO for readmission.

N. Readmission or Admission of Previously Expelled Student

The decision to readmit a student after the end of the student's expulsion term or to admit a previously expelled student from another school district or charter school 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 TACMO Board of Directors following a meeting with the Superintendent or designee and the student and parent/guardian or representative to determine whether the student has successfully completed the rehabilitation plan and to determine whether the student poses a threat to others or will be disruptive to the school environment. The Superintendent or designee shall make a recommendation to the TACMO Board of Directors following the meeting regarding the Superintendent'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 student's readmission is also contingent upon TACMO's capacity at the time the student seeks readmission or admission to the Charter School.

#### O. Notice to Teachers

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

#### P. Involuntary Removal for Truancy

As charter schools are schools of choice and as a charter school student who fails to attend school is potentially depriving another student of their opportunity to enroll, a student may be involuntarily removed as described within the Charter School's Board adopted Attendance Policy for truancy and only after the Charter School follows the requirements of the Attendance Policy and only in accordance with the policy described above which requires notice and an opportunity for a parent, guardian, educational rights holder to request a hearing prior to any involuntary removal. Students who are involuntarily removed for truancy will be given a rehabilitation plan and will be subject to the readmission procedures set forth herein.

#### Q. Special Procedures for the Consideration of Suspension, Expulsion or Involuntary Removal of Students with Disabilities

##### 1. Notification of District

TACMO shall immediately notify the District and coordinate the procedures in this policy with the District for the discipline of any student with a disability or student who the Charter School or District 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, TACMO, 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 TACMO, 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 TACMO, 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 TACMO 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 and TACMO agree to a change of placement as part of the modification of the behavioral intervention plan.

If TACMO, the parent, 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 TACMO 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 TACMO 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 TACMO, 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 TACMO 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

TACMO 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 Superintendent or his/her 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 IDEIA and who has violated TACMO's disciplinary procedures may assert the procedural safeguards granted under this administrative regulation only if TACMO had knowledge that the student was disabled before the behavior occurred.

TACMO 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 TACMO 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 TACMO personnel, has expressed specific concerns about a pattern of behavior demonstrated by the child, directly to the director of special education or to other TACMO supervisory personnel.

Board Policy #: 12-002  
Adopted/Ratified: April 19, 2012  
Revision Date: May 16, 2019  
Revision Date: April 15, 2021

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

TACMO 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.

This policy revision was formally adopted at a meeting of The Academies Charter Management Organization Board of Directors on April 15, 2021.

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Alex Tietjen, Board Secretary



# Minutes

## TACMO Board Meeting-March 2021

📅 Thu March 18th, 2021

🕒 6:30pm - 8:30pm PDT

📍 Zoom

### 👤 In Attendance

Erin Andersen, Michelle Phillips, Harold Rollin, Craig Wheaton

## 1 OPENING BUSINESS

Others in attendance: Donya Ball, Allan Benton, Dana Stinson, Claudia Van Groningen, Amita Parikh, Cristina Johnson, Holly Denniston Sheets, Marilou Monsivais, Brittany Knotts, Dee Sitton, Cristina Gutierrez, Erica Galindo, Shonna O'Neill.

### 1.1 CALL PUBLIC SESSION TO ORDER

Rollin called public session to order at 6:30PM.

### 1.2 ADA ACCOMMODATIONS

1.2.1 **This meeting is held in an area accessible to the disabled. In compliance with the American Disabilities Act, if you need special assistance to participate in meetings, call (559) 730-7422 at BOA forty-eight (48) hours in advance of the meeting. Persons who are in need of disability-related modification or accommodation in order to participate in the Board meeting may make a request to Donya Ball at PO Box 1189, Visalia, CA 93279 or (559) 730-7422. Such a request should be in writing if possible or may be made in person or by telephone. The request should specify the nature of the accommodation or modification requested, including any auxiliary aids or services requested, and the name, address, and telephone number of the person making the request.**

- 1.2.2 **If documents are distributed to Board members concerning an agenda item within 72 hours of a regular Board meeting, at the same time the documents will be made available for public inspection. Interested members of the public may request to see the same documents by emailing the Superintendent (dball@theacademiescharters.org), and the complete packet will be shared electronically.**

1.3 **IDENTIFY CLOSED SESSION TOPICS OF DISCUSSION**

There were no closed session topics this evening.

1.4 **PUBLIC COMMENT ON CLOSED SESSION TOPICS**

- 1.4.1 **General public comment on any closed session item will be heard. The Board may limit individual comments to no more than 3 minutes and individual topics to 20 minutes. Please begin your comments by stating your name.**

There were no public comments this evening.

1.5 **ADJOURN TO CLOSED SESSION**

2 **CLOSED SESSION**

- 2.1 **There are no Closed Session items to include this evening.**

3 **REGULAR SESSION RECONVENED**

3.1 **CALL PUBLIC SESSION TO ORDER**

3.2 **REPORT ACTION TAKEN IN CLOSED SESSION (if any)**

- 3.3 **General public comment on any school related topic may be heard at this time. The Board asks that any public comment on an item listed on tonight's agenda be addressed at the time the item comes up for discussion by the Board. Pursuant to Board Policy, the Board may limit individual comments to no more than 3 minutes and individual topics to 20 minutes. Please begin your comments by stating your name.**

4 **CONSENT AGENDA**

4.1 **ADMINISTRATIVE SERVICES**

Rollin noted that he made a few grammatical corrections to the policies in advance of the meeting. Rollin called for items to be removed from the consent agenda section 4.1, hearing none, all items in 4.1 are deemed approved.

- 4.1.1 **Board Policy: 12-006 Nondiscrimination Statement (Enc. No. 1)**

- 4.1.2 **Board Policy: 21-001 Parent and Family Engagement Policy (Enc. No. 2)**
- 4.1.3 **Board Policy: 21-002 Free and Reduced Price Meals Policy (Enc. No. 3)**
- 4.1.4 **Board Student Policy: 12-003 Student Technology and Internet Safety Policy (Enc. No. 4)**
- 4.1.5 **Board Student Policy: 17-001 Youth Suicide Prevention Policy (Enc. No. 5)**

#### 4.2 **SUPERINTENDENT'S OFFICE**

Rollin called for items to be removed from the consent agenda section 4.2, hearing none, items in 4.2 are deemed approved.

- 4.2.1 **Approval of Minutes of the board meeting on February 18, 2021 (Enc. No. 6)**
- 4.2.2 **Approval of the February 2021 Check Register Report (Enc. No. 7)**
- 4.2.3 **Donation Recognition (Enc. No. 8)**
- 4.2.4 **Monthly Attendance Reports for BOA and SVA (Enc. No. 9)**

### 5 **PUBLIC RECOGNITION/PROCLAMATIONS/ACTION**

- 5.1 **There are no Public Recognition/Proclamation/Action items to include this evening.**

Rollin recognized the service of exiting board member Lily Wachter.

### 6 **PROGRAM UPDATE & BOARD DEVELOPMENT**

Presentation/Public Hearing/Public Comment/Board Discussion

#### 6.1 **Program Update**

- 6.1.1 **AB & SB 86 (Enc. No. 10)**

Ball presented regarding this State of California legislation which provides a significant amount of money for elementary schools which are open for in-person/hybrid instruction by April 1. She reviewed additional conditions including OSHA and CDC requirements.

#### 6.2 **Board Development**

- 6.2.1 **Superintendent Evaluation Template Review (Enc. No. 11)**

Ball presented the Superintendent Evaluation Template.

### 7 **COMMUNITY REPORTS**

Presentation/Public Hearing/Public Comment/Board Discussion

## 7.1 **Board Member Report**

Phillips: no report.

Andersen: no report.

Wheaton: no report.

Rollin: reported feeling appreciative and proud of our organization. He added a comment about the ad hoc committee he proposed last month stating it would be on hold until the fall.

## 7.2 **Superintendent Report**

### 7.2.1 **Charter Renewal Update**

Ball reported that the revisions to Element A have been completed. Meetings regarding the remaining elements have been scheduled out through the spring. The draft petition will be presented to the board in August or September.

### 7.2.2 **Local Control Accountability Plan (LCAP) Timeline (Enc. No. 12)**

Ball reviewed the LCAP and funding timeline noting that the current year LCAP process was waived with another process supplanting it temporarily. She has been and will continue soliciting stakeholder feedback for the LCAP. Ball requested board feedback regarding the continuance of a financial subcommittee and solicited participation from board members. Andersen volunteered, Wheaton also stated that he would participate.

### 7.2.3 **TACMO Organization Climate Survey Data (Enc. No. 13)**

Ball noted the increase in participation this year and she reviewed three areas for improvement which stood out in the survey data (targeted instruction of the English learner subgroup, extracurricular activities, and enrichment). Andersen drew attention to the high rate of satisfaction amongst staff who completed the survey.

## 7.3 **Principal Report**

### 7.3.1 **Reopening of School at BOA (Enc. No. 14)**

Stinson reported highlights of Blue Oak school reopening process over the very short turnaround time from approval to opening.

### 7.3.2 **Reopening of School at SVA**

Benton reported highlights of Sycamore Valley school reopening and expressed gratitude to CMO and site staff for the background work in accomplishing reopening.

## 7.4 **Operations Director Report**

### 7.4.1 **Operations Update**

Van Groningen reported highlights of before and after school care programs for the AM/PM cohort hybrid model at both school sites.

## 7.5 **Teacher Representative Report**

### 7.5.1 **Curriculum & Instruction Update**

Johnson reported. Everyone has had to contribute significant energy to reopen and everyone is happy to be back. Bennett's student art is on showcase at TCOE. Many PBL projects are coming up. A BOA 5th grader and SVA 7th grader were successful at County spelling bee. SVA's Yong Lee is a finalist.

## 8 **ADMINISTRATIVE PANEL RECOMMENDATIONS/ACTIONS**

Review/Public Hearing/Public Input/Board Discussion/ACTION (as applicable)

8.1 **There are no Administrative Panel items to discuss this evening.**

## 9 **GENERAL AGENDA**

Review/Public Hearing/Public Input/Board Discussion/ACTION (as applicable)

### 9.1 **Monthly Financials Presentation (Enc. No. 15) ACTION**

Amita Parikh presented. Wheaton moved to approve the monthly financials, Phillips seconded, approved 4-0.

### 9.2 **2020-21 2nd Interim Report for Blue Oak Academy (Enc. No. 16) ACTION**

### 9.3 **2020-21 2nd Interim Report for Sycamore Valley Academy (Enc. No. 17) ACTION**

Amita Parikh presented the reports for both schools. Andersen moved to approve the 2nd Interim Reports for Blue Oak Academy and Sycamore Valley Academy, Wheaton seconded, approved 4-0.

### 9.4 **Applications for new Board Member considerations (Enc. No. 18) ACTION**

Andersen presented and invited the candidates to introduce themselves. Andersen then moved to accept the two candidates C. Gutierrez and M. Monsivias as members of the Board of Directors, Wheaton seconded, approved 4-0.

### 9.5 **Covid Prevention Plan & Guidance Checklist (Enc. 19) ACTION**

Ball provided an overview of the plan and checklist. Andersen moved to approve the COVID Prevention Plan and Guidance Checklist, Phillips seconded, approved 5-0, Gutierrez abstained from the vote.

### 9.6 **In-person Instruction for Grades 7-8 (Enc. No.. 20) ACTION**

Ball presented, recommending a start date of April 7. Wheaton moved to approve in-person instruction for grades 7 and 8 with an opening date of April 7, Andersen seconded, approved 6-0.

### 9.7 **Discussion of Procurement and Contract Bidding Policy (Enc. No. 21)**

Ball presented a sample policy noting that legal counsel advised that a policy is not required.

## 10 **ADJOURNMENT**

10.1 **Request for future Board Agenda items**

No requests were made this evening.

10.2 **The next The Academies CMO board meeting: April 15, 2021 at 6:30 PM via Zoom.**

Rollin adjourned the meeting at 8:27PM.



Payment Type	Check #/CC Account	Vendor	Transaction Date	Description	Void	Amount
Check	6411	CALSTRS	3/17/2021	Bill #167263--Monthly Administration Fees: February '21		\$ 38.00
Check	6412	Cline's Business Equipment, Inc.	3/17/2021	Bill #175499--Contract Usage charge: 01/13 - 02/12/21 Bill #175497--Contract Usage charge: 01/12 - 02/12/21 Bill #175715--Contract Usage charge: 02/01 - 02/28/21 Bill #175500--Contract Usage charge: 01/13 - 02/12/21 Bill #175390--Contract Usage charge: 01/16 - 02/15/21 Bill #175391--Contract Usage charge: 01/16 - 02/15/21 Bill #175732--Contract Usage charge: 02/01 - 02/28/21 Bill #175392--Contract Usage charge: 01/16 - 02/15/21 Bill #175498--Contract Usage charge: 01/13 - 02/12/21		\$ 905.21
Check	6413	DKJ Architects, Inc	3/17/2021	Bill #221026--Construction Docs Site Research and Assessment		\$ 1,100.00
Check	6414	LEAF	3/17/2021	Bill #11592468--Konica Copier Systems due by 03/19/21 + Late Fee Bill #11587497--Konica Copier Systems due by 03/16/21 + Late Fee		\$ 554.62
Check	6415	Law Offices of Young, Minney & Corr, LLP	3/17/2021	Bill #69856--Legal Svcs thru: 02/28/21		\$ 825.07
Check	6416	Northwest Evaluation Association	3/17/2021	Bill #48761--Virtual Consulting - 60 Mins - Up to 12 Participants		\$ 300.00

Payment Type	Check #/CC Account	Vendor	Transaction Date	Description	Void	Amount
Check	6417	Office Depot	3/17/2021	Bill #159284230001--Supplies Bill #154647046001--Supplies Bill #152168538001--Supplies Bill #157228860001--Supplies Bill #159347701001--Supplies Bill #159246694001--Supplies Bill #159471013001--Supplies Bill #150255737001--Supplies Bill #152595341001--Supplies Bill #157061987001--Supplies Bill #160171552001--Supplies Bill #159578561001--Supplies Bill #157136541001--Supplies Bill #157400082001--Supplies Bill #157399818001--Supplies Bill #157230978001--Supplies		\$ 1,144.09
Check	6418	Sacramento County Office of Education	3/17/2021	Bill #211327--ELPAC Admin Trainers Kit		\$ 72.10
Check	6419	Sign Time	3/17/2021	Bill #76272--Quick A-Frame with Two 18x24 3mm PVC Sign Insects Bill #76271--Signicade Deluxe A-Frame Including one 36X24 3mm PVC Insert with Digital Print		\$ 1,584.11
Check	6420	William V. Macgill & Co.	3/17/2021	Bill #IN0751248--Medical Supplies		\$ 430.66
Check	- None -	Sign Gypsies	3/17/2021	Bill #0263--Blue Oak Academy Journal #SVAC2806-- Bill #0281--Back to school	Voided	\$ -
Check	6421	Sign Gypsies	3/19/2021	Bill #0281--Back to school Bill #0263--Blue Oak Academy		\$ 217.00
Check	6422	Pacific Ag Insurance IN	3/29/2021	Journal #SVAC2824-- Bill #8090 - 186252120--20/21 PCKG Installment #10 of 10	Voided	\$ -

Payment Type	Check #/CC Account	Vendor	Transaction Date	Description	Void	Amount
Check	6422A	Pacific Ag Insurance IN	3/29/2021	Bill #8090 - 186252120A--20/21 PCKG Installment #10 of 10		\$ 1,970.00
Check	DB030121	Markel	3/1/2021	DB030121 - Worker's Comp 2/15/20 payroll premium & installment fee		\$ 1,838.89
Check	DB031521	Markel	3/15/2021	DB031521 - Worker's Comp 2/28/21 payroll premium & installment fee		\$ 1,833.07
Check	DB031721	Cardmember Service	3/17/2021	DB031721 - Central Valley Community Bank (CVCB) Visa 8054		\$ 5,493.65
Check	DB032921	Markel	3/29/2021	DB032921 - Worker's Comp 3/15/21 payroll premium & installment fee		\$ 1,800.98
Credit Card	9515-8054	Alen Corporation	3/15/2021	03/11 - Alen Corporation - Air purifiers		\$ 807.05
Credit Card	9515-8054	Alen Corporation	3/15/2021	03/11 - Alen Corporation - Air purifiers		\$ 807.05
Credit Card	9515-8054	Amazon.Com	3/15/2021	03/15 - Amazon.Com - Folding step stool		\$ 59.66
Credit Card	9515-8054	Harbor Freight Tools	3/15/2021	03/08 - Harbor Freight Tools - Painting supplies		\$ 8.66
Credit Card	9515-8054	The Home Depot	3/15/2021	03/08 - The Home Depot - Paint for marking student distancing		\$ 25.95
Credit Card	9515-8054	Amazon.Com	3/15/2021	03/05 - Amazon.Com - Adhesive velcro strips		\$ 18.32
Credit Card	9515-8054	Amazon Mktp us	3/15/2021	03/04 - Amazon Mktp us - Wall hooks		\$ 19.50
Credit Card	9515-8054	Amazon.Com	3/15/2021	03/03 - Amazon.Com - USB cable		\$ 42.04
Credit Card	9515-8054	Amazon Mktp us	3/15/2021	03/02 - Amazon Mktp us - Classroom sanitation and safety supplies for reopening		\$ 682.48
Credit Card	9515-8054	EIG *Constant Contact	3/15/2021	03/02 - EIG *Constant Contact - Monthly renewal fee for email subscription		\$ 50.00
Credit Card	9515-8054	Amazon.Com	3/15/2021	03/01 - Amazon.Com - Computer monitor		\$ 349.79
Credit Card	9515-8054	Alen Corporation	3/15/2021	02/25 - Alen Corporation - Air purifiers		\$ 1,625.34
Credit Card	9515-8054	Bluehost	3/15/2021	02/22 - Bluehost - Annual domain name registration for tacmo.org		\$ 11.88
Credit Card	9515-8054	The UPS Store	3/15/2021	03/15 - The UPS Store - Stamps for payroll & tax forms delivery		\$ 124.00
Credit Card	9515-8054	Amazon.Com	3/15/2021	03/12 - Amazon.Com - HDMI cable		\$ 22.37

Note: Multiple expenses or "Itemized/Invoice Amounts" may be paid by one check. The total "Check Amount" will appear for each "Itemized/Invoice Amount" paid by the check.

Page 5

# THE ACADEMIES

CHARTER MANAGEMENT ORGANIZATION

PO BOX 1189, VISALIA CA 93279 · 559.622.3236



*Thank you so much for your donation!*

Gifts like yours help us further our Mission and ensure the vitality of this exciting educational option in our community. On behalf of the entire team of founders, The Academies Board of Directors, and our students, who are the beneficiaries of your generosity, we extend our warm thanks for your support.

DONOR'S NAME: Cristina Johnson

AMOUNT DONATED: \$20.00

No goods or services were provided in return for this gift.

A handwritten signature in black ink that reads "Donya Ball".

Received by \_\_\_\_\_ April 2, 2021  
Dr. Donya Ball, Superintendent

The Academies Charter Management Organization Tax ID #: 37-1638700

The mission of our schools is to provide a rich, meaningful education in a nurturing environment, where students are continually challenged and their natural curiosity, creativity, and talents can thrive. Our school is a collaborative community of educators and families working together to help our students grow into virtuous, courageous, and intelligent citizens, equipped with a love of learning and a love of life, and eager to contribute to a better world.

The Academies charter schools model transformative change in education by elevating expectations of learning and growth. With grit, tenacity, and empathy, we improve the world around us by embracing challenges as problem-solvers. We create an inclusive community with access to rigorous and enriching educational experiences that challenge and support individuals to achieve their personal best and realize new opportunities.

*Accelerating Academics in an Enriching Environment*  
theacademiescharters.org



**Thank you so much for your donation!**

Gifts like yours help us further our Mission and ensure the vitality of this exciting educational option in our community. On behalf of the entire team of founders, The Academies Board of Directors, and our students, who are the beneficiaries of your generosity, we extend our warm thanks for your support.

DONOR'S NAME: Bryan Company

AMOUNT DONATED: \$20.00

No goods or services were provided in return for this gift.

A handwritten signature in black ink that reads "Donya Ball".

Received by \_\_\_\_\_ March 17, 2021  
Dr. Donya Ball, Superintendent

The Academies Charter Management Organization Tax ID #: 37-1638700

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DONOR'S NAME: Laura Brumm

AMOUNT DONATED: \$50.00

No goods or services were provided in return for this gift.

Received by \_\_\_\_\_ March 18, 2021  
Dr. Donya Ball, Superintendent

The Academies Charter Management Organization Tax ID #: 37-1638700

The mission of our schools is to provide a rich, meaningful education in a nurturing environment, where students are continually challenged and their natural curiosity, creativity, and talents can thrive. Our school is a collaborative community of educators and families working together to help our students grow into virtuous, courageous, and intelligent citizens, equipped with a love of learning and a love of life, and eager to contribute to a better world.

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# Attendance Summary By Grade

## Sycamore Valley Academy Charter School 178

Run Date/Time: 3/23/21 2:21 PM

02/22/2021 to 03/19/2021 = 19 days

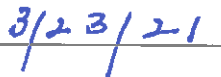
Grade Level	Carry Fwd	Gain	Loss	Ending	Actual Days	OffTrack	Days N/E	Days Ineligible	Days Absent	Days Attd	ADA	ADA %
0	56	3	0	59	1121	0	21	0	38.00	1062.00	55.89	96.55%
<b>SubTotal</b>	<b>56</b>	<b>3</b>	<b>0</b>	<b>59</b>	<b>1121</b>	<b>0</b>	<b>21</b>	<b>0</b>	<b>38.00</b>	<b>1062.00</b>	<b>55.89</b>	<b>96.55%</b>
1	42	0	0	42	798	0	0	0	19.00	779.00	41.00	97.62%
2	43	0	0	43	817	0	0	0	26.00	791.00	41.63	96.82%
3	43	0	0	43	817	0	0	0	3.00	814.00	42.84	99.63%
<b>SubTotal</b>	<b>128</b>	<b>0</b>	<b>0</b>	<b>128</b>	<b>2432</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>48.00</b>	<b>2384.00</b>	<b>125.47</b>	<b>98.03%</b>
4	43	0	0	43	817	0	0	0	6.00	811.00	42.68	99.27%
5	40	0	1	39	760	0	4	0	14.00	742.00	39.05	98.15%
6	48	0	1	47	912	0	13	0	14.00	885.00	46.58	98.44%
<b>SubTotal</b>	<b>131</b>	<b>0</b>	<b>2</b>	<b>129</b>	<b>2489</b>	<b>0</b>	<b>17</b>	<b>0</b>	<b>34.00</b>	<b>2438.00</b>	<b>128.32</b>	<b>98.62%</b>
7	40	0	0	40	760	0	0	0	64.00	696.00	36.63	91.58%
8	35	0	0	35	665	0	0	0	20.00	645.00	33.95	96.99%
<b>SubTotal</b>	<b>75</b>	<b>0</b>	<b>0</b>	<b>75</b>	<b>1425</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>84.00</b>	<b>1341.00</b>	<b>70.58</b>	<b>94.11%</b>
<b>Grand Total</b>	<b>390</b>	<b>3</b>	<b>2</b>	<b>391</b>	<b>7467</b>	<b>0</b>	<b>38</b>	<b>0</b>	<b>204.00</b>	<b>7225.00</b>	<b>380.26</b>	<b>97.25%</b>

To the best of my knowledge,  
the above attendance information is correct.

Signed



Date



### Report Calculations

(( Carry Fwd + Gain ) X School Days ) = Actual Days

Actual Days - ( Off Track + Days N/E + Days Ineligible + Days Absent ) = Days Attd

[ Days Attd / (Actual Days - Off Track - Days N/E - Days Ineligible ) ] X 100 = ADA%

## Attendance Summary By Grade

**Blue Oak Academy Charter School**  
02/22/2021 to 03/19/2021 = 19 school days

Grade Level	Carry Fwd	Gain	Mult Gain	Loss	Ending	Actual Days	OffTrack	Days N/E	Days Absent	Days Attd	ADA	ADA %
0	64	2	1	2	64	1235	0	19	88.00	1128.00	59.37	92.76%
<b>Subtotal</b>	<b>64</b>	<b>2</b>	<b>1</b>	<b>2</b>	<b>64</b>	<b>1235</b>	<b>0</b>	<b>19</b>	<b>88.00</b>	<b>1128.00</b>	<b>59.37</b>	<b>92.76%</b>
1	42	0	0	0	42	798	0	0	7.00	784.00	41.26	98.25%
2	44	2	0	0	46	874	0	8	8.00	858.00	45.16	99.08%
3	42	0	0	0	42	798	0	0	19.00	770.00	40.53	96.49%
<b>Subtotal</b>	<b>128</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>130</b>	<b>2470</b>	<b>0</b>	<b>8</b>	<b>34.00</b>	<b>2412.00</b>	<b>126.95</b>	<b>97.97%</b>
4	42	0	0	0	42	798	0	0	23.00	762.00	40.11	95.49%
5	48	0	0	1	47	912	0	4	7.00	901.00	47.42	99.23%
<b>Subtotal</b>	<b>90</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>89</b>	<b>1710</b>	<b>0</b>	<b>4</b>	<b>30.00</b>	<b>1663.00</b>	<b>87.53</b>	<b>97.48%</b>
<b>Grand Total</b>	<b>282</b>	<b>4</b>	<b>1</b>	<b>3</b>	<b>283</b>	<b>5415</b>	<b>0</b>	<b>31</b>	<b>152.00</b>	<b>5203.00</b>	<b>273.85</b>	<b>96.64%</b>

To the best of my knowledge,  
the above attendance information is correct.

Signed \_\_\_\_\_

Date 3/24/21

### Report Calculations

(( Carry Fwd + Gain - Mult. Gain ) X School Days ) = Actual Days

Actual Days - ( Off Track + Days N/E + Days Absent ) = Days Attd

[ Days Attd / (Actual Days - Off Track - Days N/E ) ] X 100 = ADA%

[Note: Multiple gains are for students that entered more than one time during the report time span.]

**THE ACADEMIES CHARTER MANAGEMENT ORGANIZATION**  
**2021-2022**

**BUDGET &  
LOCAL CONTROL ACCOUNTABILITY PLAN (LCAP)  
TIMELINE**

<b>DATE</b>	<b>DESCRIPTION</b>
<b>July 23 &amp; 24, 2020 August 6 &amp; 7, 2020 September 1 &amp; 2, 2020 October 6 &amp; 7, 2020 November 2 &amp; 4, 2020 December 15 &amp; 16, 2020 January 19 &amp; 20, 2021 February 23 &amp; 24, 2021 March 23 &amp; 24, 2021 April 27 &amp; 28, 2021 May 25 &amp; 26, 2021</b>	Monthly parent forums to provide organizational updates, receive stakeholder input, and answer questions
<b>February 25, 2021</b>	21-22 budget priorities meeting with TACMO staff. Receive stakeholder input.
<b>March 1-10, 2021</b>	Parent completion of organizational climate survey
<b>March 18, 2021- Board Meeting</b>	Report on summary of survey data.
<b>April 15, 2021- Board Meeting</b>	Report plans and potential goals to address eight (8) state priorities in the 21-22 LCAP
<b>June 10, 2021- Special Board Meeting</b>	Public Hearing 21-22 LCAP & Budget Stakeholder input regarding proposed expenditures
<b>June 17, 2021- Board Meeting</b>	Approval of 21-22 budget and LCAP

# **THE ACADEMIES**

CHARTER MANAGEMENT ORGANIZATION



April 15, 2021

# LOCAL CONTROL ACCOUNTABILITY PLAN (LCAP)

- The LCAP is a critical part of public school funding.
- Each school district (including Charter Schools) must engage parents, educators, employees and the community to establish the spending plans.
- The plan will describe the organization's overall vision for students, annual goals and specific actions the organization will take to achieve the vision and goals.
- The LCAP must focus on eight (8) areas identified as state priorities. The plan will show how the organization's expenditures will help improve student learning.





THE **ACADEMIES**  
CHARTER MANAGEMENT ORGANIZATION



# GOAL 1

All students participate in deep instruction with appropriate support and demonstrate academic growth and achievement.



# ACTIONS & SERVICES

## GOAL 1

- Continued implementation of Transitional Kindergarten
- Development and implementation of academic interventions as part of Multi Tiered Systems of Support (MTSS)
- Utilization of local and state student achievement data to inform instructional practices



# GOAL 2

All students are engaged by connecting their interests and learning to develop awareness of self, community, and world.



# ACTIONS & SERVICES

## GOAL 2

- Continued implementation of behavioral interventions as part of Multi Tiered Systems of Support (MTSS)
- Expansion of extra and co curricular activities
- Retainment of full time school psychologist
- Development and implementation of music program
- Continued facility improvements in alignment with Facility Use Agreement (FUA)
- Expansion of special education teaching staff



# GOAL 3

Teachers, staff, and administrators are supported and empowered to continuously improve their practice for the benefit of themselves, their students and the greater public education system.



# ACTIONS & SERVICES

## GOAL 3

- Improvement of instruction through Project Based Learning (PBL) professional development for certificated staff through Buck Institute
- Continued implementation of new hire orientation for classified and certificated staff
- Improvement of leadership through administrator professional development opportunities



# GOAL 4

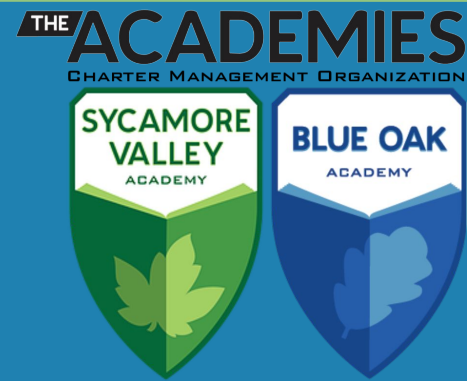
Sycamore Valley Academy and Blue Oak Academy operates as a hub of resources, support, and opportunities for its families and greater community.

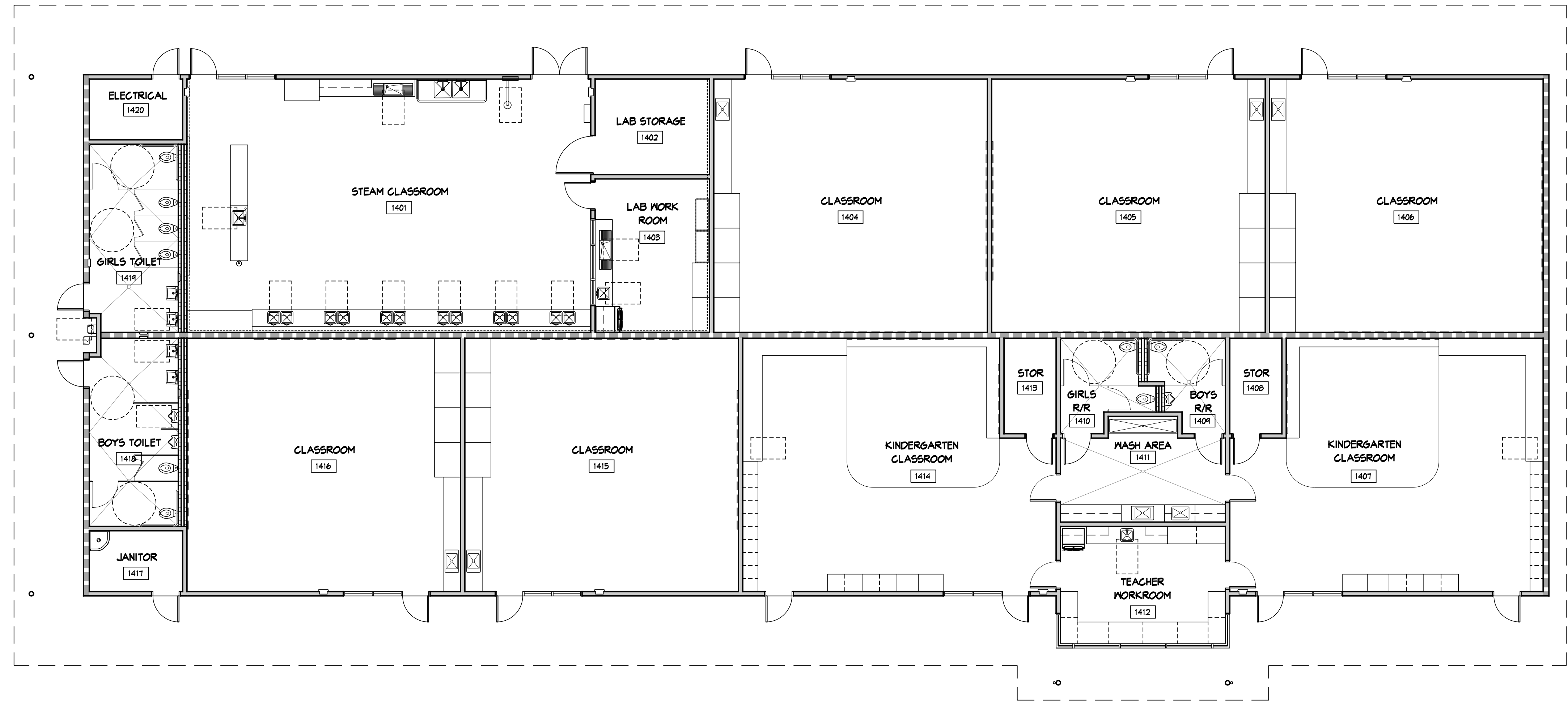


# ACTIONS & SERVICES

## GOAL 4

- Development of fall and spring parent and community workshops
- Utilization of common messaging platform and social media to communicate events and important information to families
- Continued updates of school website to provide centralized access of resources





**FLOOR PLAN**  
SCALE: 1/8" = 1'-0"



KEYNOTES

LEGEND

NOTES

NOT FOR CONSTRUCTION



1736 S. Central Street., Suite A  
Visalia, CA 93277  
P: 559.738.0309 • info@dkjarchitects.com

DRAWN BY: DA  
DATE: 3/26/2021  
REVISED:

**NEW CLASSROOM WING  
BLUE OAK ACADEMY**  
VISALIA UNIFIED SCHOOL DISTRICT  
28050 ROAD 148 VISALIA, CA. 93292  
TULARE COUNTY

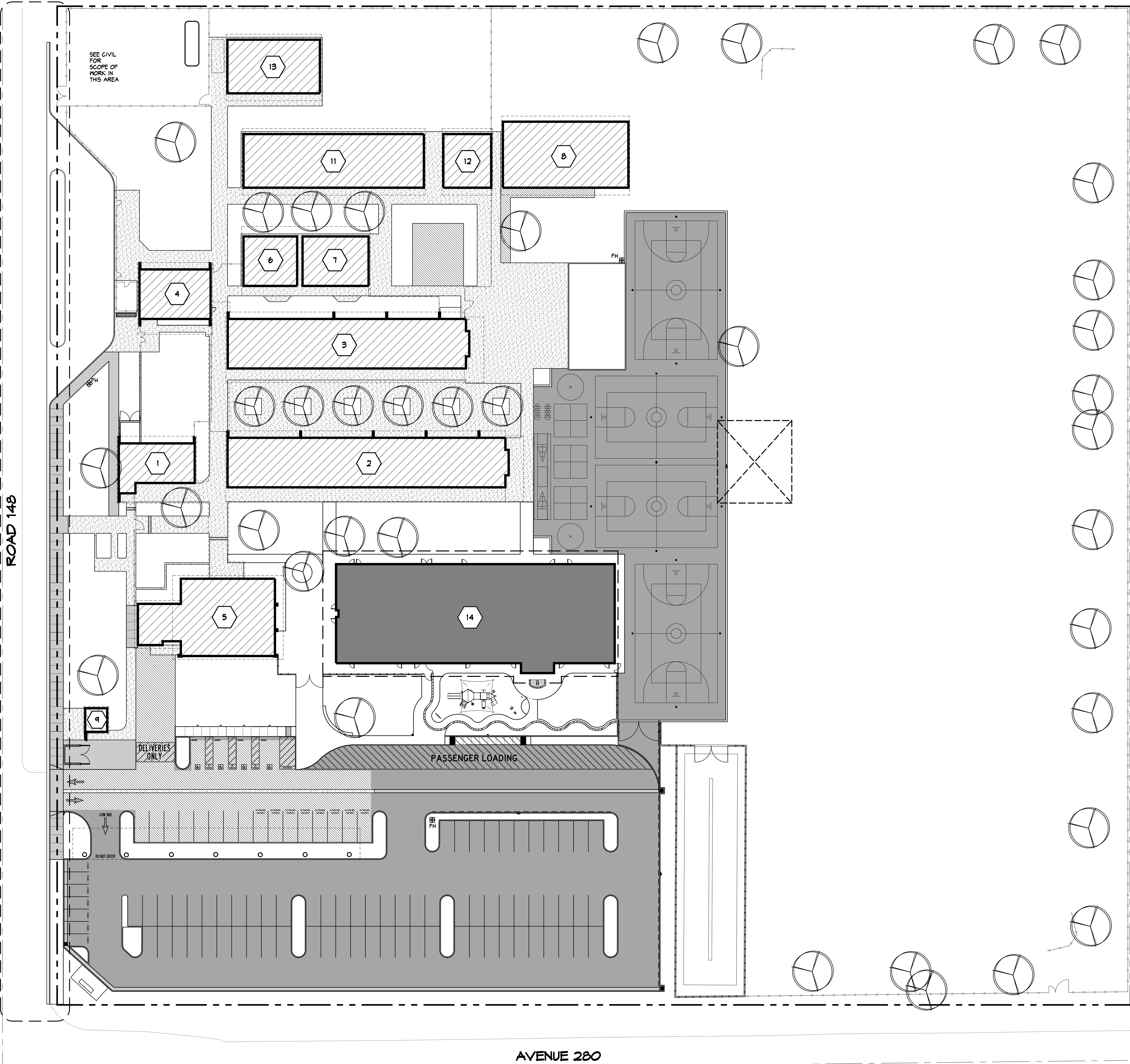
PROJECT NUMBER: 202017.10

DRAWING TITLE

FLOOR PLAN

DRAWING NUMBER

A1



**SITE DEVELOPMENT PLAN**  
SCALE: 1" = 30'

**KEYNOTES**

**LEGEND**

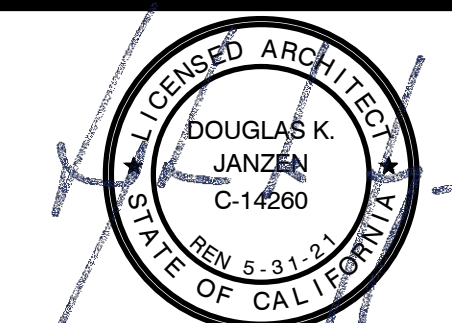
- PROPOSED BUILDING
- (E) BUILDINGS
- CONCRETE WALKWAYS
- (E) CONCRETE WALKWAYS
- (E) ASPHALT PAVING TO RECEIVE NEW FOG SEAL
- ASPHALT PAVING
- CMU WALL, SEE STRUCTURAL DRAWINGS
- FH FIRE HYDRANT, (HYDRANTS ON PLAN ARE SHOWN EXAGGERATED IN SIZE FOR CLARITY).
- PROPERTY LINE
- (E) CHAIN LINK FENCING
- CHAIN LINK FENCING
- PROPOSED BUILDING OVERHANG
- (E) BUILDING OVERHANGS
- EXPANSION JOINT, SEE DETAIL TA/AS6
- DEEP CRACK CONTROL JOINT, SEE DETAIL 1C/AS6
- SHALLOW CRACK CONTROL JOINT, SEE DETAIL 7B/AS6
- (E) TREE TO REMAIN, PROTECT FROM DAMAGE DURING COARSE OF WORK.

**NOTES**

NOT FOR CONSTRUCTION



1736 S. Central Street, Suite A  
Visalia, CA 93277  
P: 559.738.0309 • info@dkjarchitects.com



DRAWN BY: DA  
DATE: 3/31/2021  
REVISED:

**ADMINISTRATION & CLASSROOM WING**  
**BLUE OAK ACADEMY**  
VISALIA UNIFIED SCHOOL DISTRICT  
28050 ROAD 148 VISALIA, CA 93292  
TULARE COUNTY

PROJECT NUMBER: 202017.10  
DRAWING TITLE  
**SITE DEVELOPMENT PLAN**

DRAWING NUMBER  
**AS3**

# The Academies CMO

## Board Financial Update

AMITA PARIKH

APRIL 2021



# FY2020-21 Forecast Summary



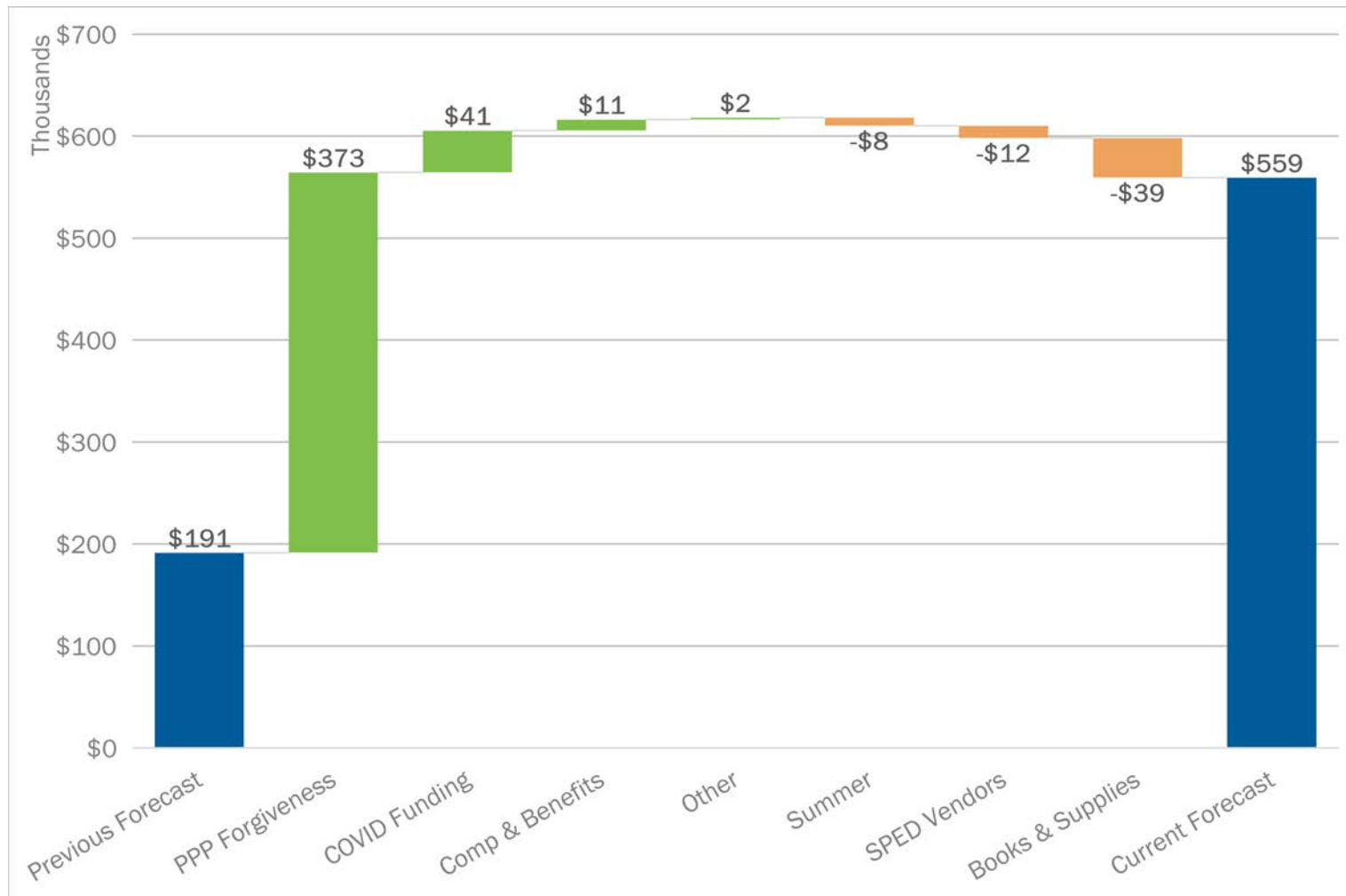
## Total Operating Income forecasted \$1.11M more than Budget

		SVA	BOA	Total	CMO
Total Revenue	Approved Budget	3,513,875	2,588,699	6,102,574	834,115
	Current Forecast	4,302,760	3,121,722	7,424,482	904,458
	Increase (decrease)	788,885	533,023	1,321,908	70,343
Expenses	Approved Budget	3,621,994	2,667,446	6,289,440	834,115
	Current Forecast	3,743,477	2,755,527	6,499,004	904,458
	Decrease (Increase)	(121,483)	(88,081)	(209,564)	(70,343)
Operating Income	Approved Budget	(108,119)	(78,747)	(186,866)	(0)
	Current Forecast	559,283	366,195	925,478	0
	Increase (decrease)	667,402	444,942	1,112,344	0
Fund Balance	Beg. Balance (Audited)	1,111,406	245,802	1,357,208	0
	Operating Income (Loss)	559,283	366,195	925,478	0
Ending Fund Balance (Current Forecast)		1,670,689	611,997	2,282,686	0
Ending Fund Balance as % of Expenses		45%	22%	35%	

# FY2020-21 Forecast Update - SVA



**Operating Income at \$559k, \$368k increase from Previous Forecast**



# FY2020-21 Forecast Update - BOA



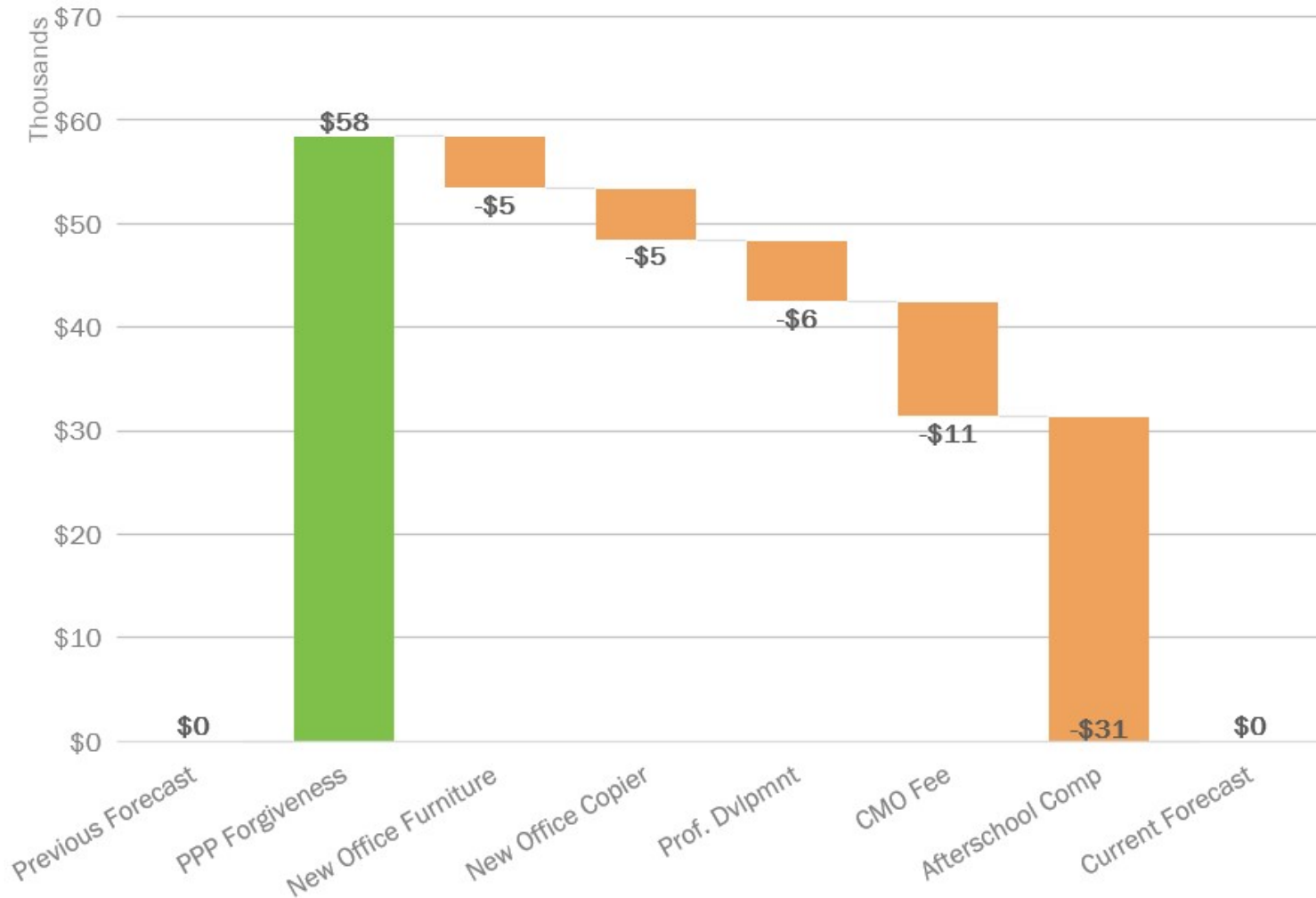
**Operating Income at \$366k, \$191k increase from Previous Forecast**



# FY2020-21 Forecast Update - CMO



## \$11k reduction to CMO Fees due to PPP forgiveness



# Pay Bonus Summary



**1.5% Bonus equals \$68k added expense this year**

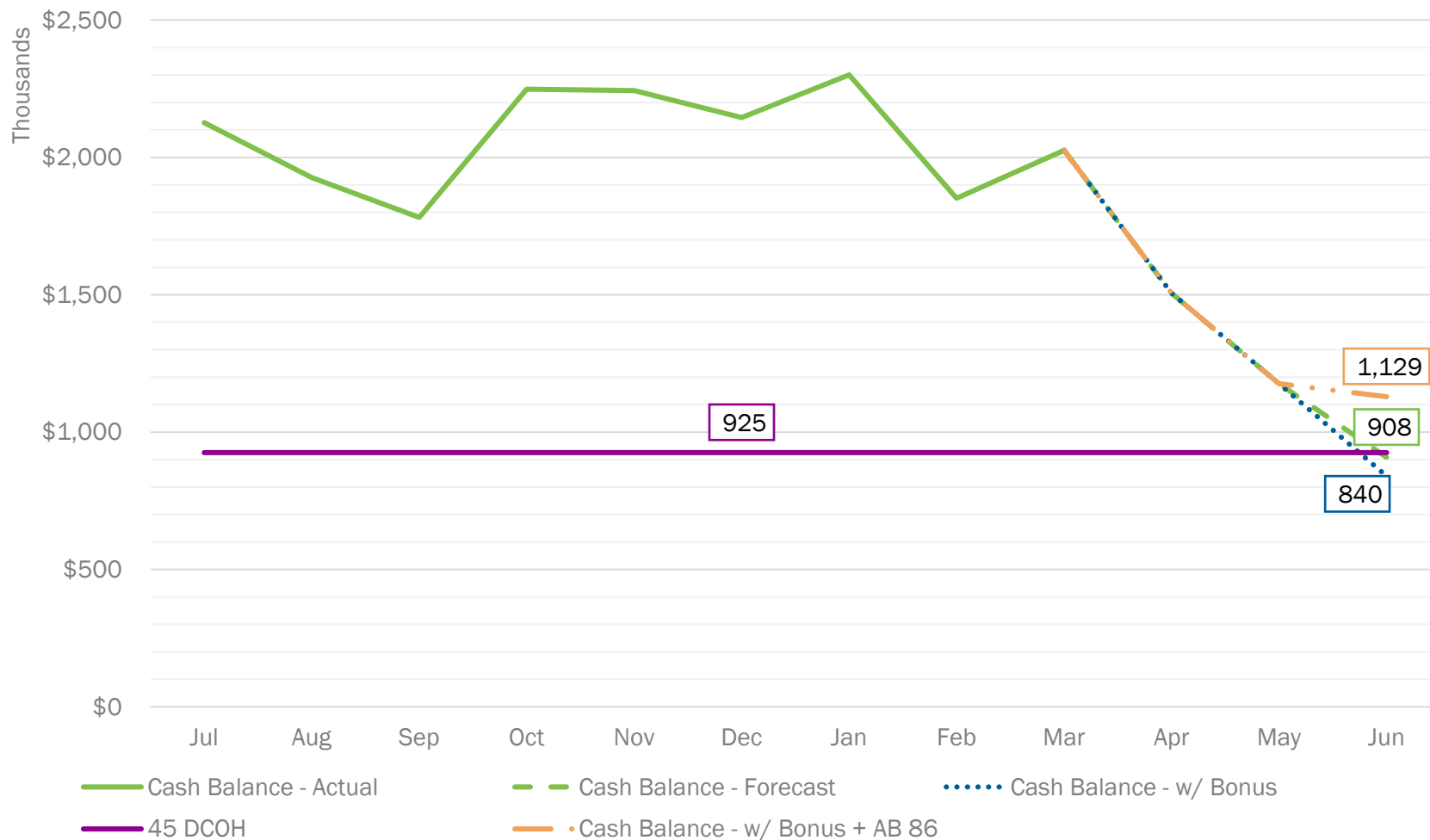
Op. Income	SVA	BOA
Current Forecast	\$559k	\$366k
Including 1.5% Bonus	\$521k	\$336k
Variance	-\$38k	-\$30k

Fund Balance % of Expense	SVA	BOA
Current Forecast	45%	22%
Including 1.5% Bonus	44%	21%
Variance	-1%	-1%

# FY2020-21 Monthly Cash Balance



**As of March, 101 days cash on hand; cash outlook stable despite deferrals**



# March 31, 2021 Balance Sheet



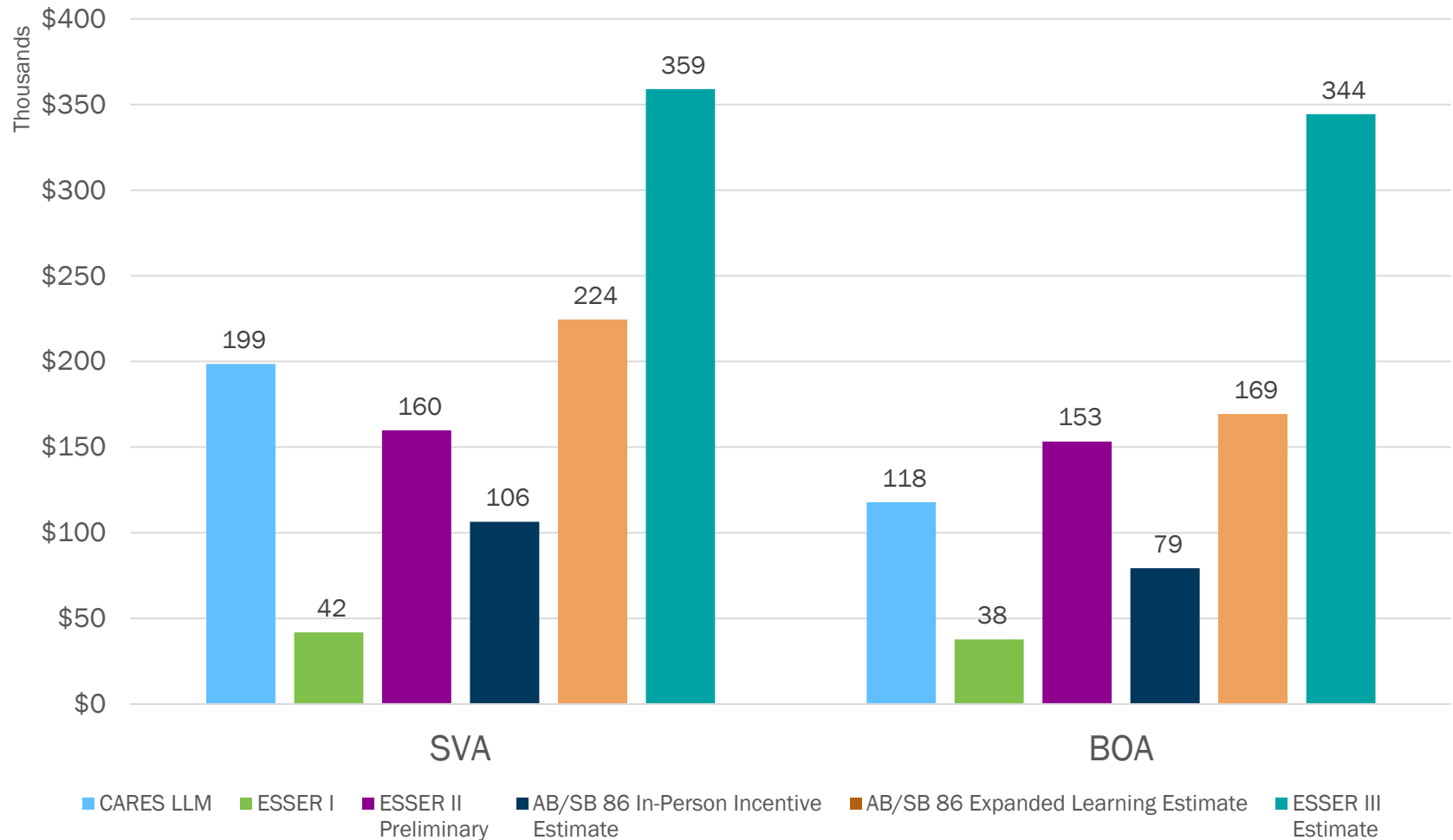
## PPP loan forgiven & no Aging AP

		Feb FY2021	Mar FY2021	YTD Change	Notes
<b>Assets</b>	Cash Balance	1,851,187	2,025,505	174,318	
	Accounts Receivable	27,448	107,523	80,075	Payroll pre-payment + PY revenue adj
	Other Current Assets	1,900	1,900	-	Deposit CMO facility
	Prepays	429	429	-	
	Fixed Assets, Net	102,270	104,386	2,115	
	<b>Total Assets</b>	<b>1,983,234</b>	<b>2,239,742</b>	<b>256,508</b>	
<b>Liabilities &amp; Equity</b>	Accounts Payable	200,810	219,640	18,830	Rent accrual; PY revenue adj - No Aging AP
	Due to Others	62,551	62,551	-	Prop 39e
	Current Loans and Other Payables	702,379	723,293	20,913	Deferred Rent + Payroll liabilities
	Long-Term Loans and Other Liabilities	778,639	108,339	(670,300)	PPP + CDE Loan (BOA)
	Beginning Net Assets	1,357,208	1,357,208	-	
	Net Income (Loss) to Date	(1,118,353)	(231,288)	887,064	
	<b>Total Liabilities &amp; Equity</b>	<b>1,983,234</b>	<b>2,239,742</b>	<b>256,508</b>	

# COVID Funding Summary



**\$396k in FY21; Potential for \$1.6M in FY22-25**



# Exhibits

March Financials



**BOA**  
**Income Statement**  
**As of Mar FY2021**

	Actual			YTD	Budget							
	Jan	Feb	Mar	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent	
SUMMARY												
Revenue												
LCFF Entitlement	174,308	-	301,230	1,163,412	2,294,258	2,409,425	2,408,429	(996)	114,171	1,245,017	48%	
Federal Revenue	14,620	-	256,664	381,725	117,392	220,716	499,103	278,387	381,711	117,379	76%	
Other State Revenues	24,415	-	9,077	59,024	96,462	136,954	136,954	-	40,492	77,930	43%	
Local Revenues	163	432	336	2,171	63,586	63,636	66,236	2,600	2,650	64,065	3%	
Fundraising and Grants	145	-	-	1,116	17,000	11,000	11,000	-	(6,000)	9,884	10%	
Total Revenue	213,651	432	567,308	1,607,447	2,588,699	2,841,731	3,121,722	279,991	533,024	1,514,275	51%	
Expenses												
Compensation and Benefits	178,928	167,980	153,648	1,334,833	1,896,129	1,843,466	1,837,079	6,387	59,050	502,246	73%	
Books and Supplies	3,459	1,160	1,862	53,481	54,288	99,106	166,652	(67,546)	(112,365)	113,171	32%	
Services and Other Operating Expenditures	27,370	21,206	28,993	258,243	715,623	722,747	750,389	(27,642)	(34,766)	492,145	34%	
Depreciation	-	-	-	-	-	-	-	-	-	-	-	
Other Outflows	115	177	(80)	1,230	1,407	1,407	1,407	-	-	177	87%	
Total Expenses	209,872	190,523	184,423	1,647,787	2,667,446	2,666,726	2,755,527	(88,801)	(88,081)	1,107,740	60%	
Operating Income												
	3,780	(190,091)	382,884	(40,340)	(78,747)	175,005	366,195	191,190	444,943	406,535		
Fund Balance												
Beginning Balance (Unaudited)					184,157	245,802	245,802					
Operating Income					(78,747)	175,005	366,195					
Ending Fund Balance												
					105,410	420,807	611,997					
Fund Balance as a % of Expenses												
					4%	16%	22%					

**BOA**  
**Income Statement**  
**As of Mar FY2021**

**KEY ASSUMPTIONS**

**Enrollment Summary**

K-3

4-6

**Total Enrolled**

**ADA %**

K-3

4-6

**Average ADA %**

**ADA**

K-3

4-6

**Total ADA**

Actual			YTD	Budget						
Jan	Feb	Mar	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
				190	187	188	1	(2)		
				94	90	89	(1)	(5)		
				<b>284</b>	<b>277</b>	<b>277</b>	-	(7)		
				96.0%	95.5%	95.0%	-0.5%	-1.0%		
				96.0%	95.6%	96.6%	1.1%	0.6%		
				<b>96.0%</b>	<b>95.5%</b>	<b>95.5%</b>	<b>0.0%</b>	<b>-0.5%</b>		
				182.21	178.60	178.60	-	(3.61)		
				90.24	86.00	86.00	-	(4.24)		
				<b>272.45</b>	<b>264.60</b>	<b>264.60</b>	-	(7.85)		

**BOA**  
**Income Statement**  
**As of Mar FY2021**

Actual				YTD	Budget							
								Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent	
Jan	Feb	Mar	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast						
REVENUE												
LCFF Entitlement												
8011	Charter Schools General Purpose Entitlement - State Aid	140,342	-	253,879	971,183	1,852,099	1,953,710	1,953,710	-	101,610	982,527	50%
8012	Education Protection Account Entitlement	10,290	-	-	20,580	54,490	52,920	52,920	-	(1,570)	32,340	39%
8019	State Aid - Prior Years	-	-	-	-	-	-	(996)	(996)	(996)	(996)	0%
8096	Charter Schools in Lieu of Property Taxes	23,676	-	47,352	171,649	387,669	402,795	402,795	-	15,126	231,146	43%
SUBTOTAL - LCFF Entitlement		174,308	-	301,230	1,163,412	2,294,258	2,409,425	2,408,429	(996)	114,171	1,245,017	48%
Federal Revenue												
8181	Special Education - Entitlement	-	-	-	-	32,189	32,189	32,189	-	-	32,189	0%
8291	Title I	12,435	-	-	21,231	29,823	45,597	45,597	-	15,774	24,366	47%
8292	Title II	-	-	5,055	6,552	5,143	8,122	8,122	-	2,979	1,570	81%
8294	Title IV	-	-	2,500	5,000	10,000	10,000	10,000	-	-	5,000	50%
8296	SRSA Grant	-	-	245,809	263,807	15,677	17,998	263,807	245,809	248,130	0	100%
8299	CARES Act	2,185	-	3,300	85,135	24,560	106,810	139,388	32,578	114,828	54,253	61%
SUBTOTAL - Federal Revenue		14,620	-	256,664	381,725	117,392	220,716	499,103	278,387	381,711	117,379	76%
Other State Revenue												
8319	Other State Apportionments - Prior Years	-	-	-	82	-	-	-	-	-	(82)	
8381	Special Education - Entitlement (State)	9,394	-	9,077	27,758	37,033	62,975	62,975	-	25,941	35,217	44%
8550	Mandated Cost Reimbursements	3,470	-	-	3,470	3,470	3,470	3,470	-	-	(0)	100%
8560	State Lottery Revenue	11,551	-	-	11,551	55,959	54,347	54,347	-	(1,612)	42,796	21%
8590	All Other State Revenue	-	-	-	16,162	-	16,162	16,162	-	16,162	-	100%
SUBTOTAL - Other State Revenue		24,415	-	9,077	59,024	96,462	136,954	136,954	-	40,492	77,930	43%
Local Revenue												
8660	Interest	-	-	173	499	1,003	1,003	1,003	-	-	504	50%
8689	FUA Reimbursement	-	-	-	-	60,382	60,382	62,982	2,600	2,600	62,982	0%
8693	Field Trips	-	-	-	50	-	50	50	-	50	(0)	100%
8699	All Other Local Revenue	163	432	163	1,622	2,201	2,201	2,201	-	-	579	74%
SUBTOTAL - Local Revenue		163	432	336	2,171	63,586	63,636	66,236	2,600	2,650	64,065	3%
Fundraising and Grants												
8801	Donations - Parents	-	-	-	-	6,000	6,000	6,000	-	-	6,000	0%
8802	Donations - Private	-	-	-	388	6,000	2,500	2,500	-	(3,500)	2,112	16%
8803	Fundraising	145	-	-	703	5,000	2,475	2,475	-	(2,525)	1,772	28%
8804	Fundraising - Fund Development	-	-	-	25	-	25	25	-	25	-	100%
SUBTOTAL - Fundraising and Grants		145	-	-	1,116	17,000	11,000	11,000	-	(6,000)	9,884	10%
TOTAL REVENUE												
		213,651	432	567,308	1,607,447	2,588,699	2,841,731	3,121,722	279,991	533,024	1,514,275	51%

**BOA**  
**Income Statement**  
**As of Mar FY2021**

Actual				YTD	Budget						
								Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
Jan	Feb	Mar	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast					
EXPENSES											
Compensation & Benefits											
Certificated Salaries											
1100 Teachers Salaries	79,547	68,281	68,281	552,478	757,208	763,739	763,739	-	(6,531)	211,262	72%
1101 Teacher - Stipends	-	-	4,000	8,000	7,000	15,000	15,000	-	(8,000)	7,000	53%
1103 Teacher - Substitute Pay	-	-	-	1,470	10,980	10,980	10,980	-	-	9,510	13%
1111 Teacher - Specialist	1,802	3,074	3,392	23,370	49,310	29,277	29,277	-	20,034	5,907	80%
1148 Teacher - Special Ed	10,201	8,757	8,757	73,589	102,074	99,858	99,858	-	2,216	26,269	74%
1150 Teacher - Interventior	5,855	5,025	5,025	42,158	55,280	56,109	56,109	-	(829)	13,951	75%
1300 Certificated Supervisor & Administrator Salaries	20,637	17,489	17,489	161,548	209,867	213,015	213,015	-	(3,148)	51,467	76%
SUBTOTAL - Certificated Salaries	118,042	102,626	106,944	862,612	1,191,719	1,187,978	1,187,978	-	3,741	325,366	73%
Classified Salaries											
2100 Classified Instructional Aide Salaries	8,896	16,788	16,842	96,359	138,540	135,575	142,427	(6,852)	(3,887)	46,068	68%
2103 Classified - Special Education	546	1,434	1,650	11,141	50,274	31,107	15,306	15,801	34,968	4,165	73%
2400 Classified Clerical & Office Salaries	4,612	5,781	5,651	43,404	56,146	57,085	61,109	(4,024)	(4,963)	17,705	71%
2905 Other Classified - After School	-	-	-	(0)	-	-	-	-	-	0	
2930 Other Classified - Maintenance/grounds	3,781	2,962	2,821	28,392	35,945	36,484	36,484	-	(539)	8,092	78%
2935 Other Classified - Substitute	-	-	-	-	1,991	1,991	1,991	-	-	1,991	0%
SUBTOTAL - Classified Salaries	17,835	26,964	26,964	179,296	282,895	262,242	257,317	4,925	25,578	78,021	70%
Employee Benefits											
3100 STRS	18,986	16,457	17,133	140,538	189,803	190,753	190,753	-	(950)	50,214	74%
3300 OASDI-Medicare-Alternative	3,527	3,928	4,109	30,323	39,943	37,712	37,335	377	2,608	7,012	81%
3400 Health & Welfare Benefits	15,349	16,248	(4,294)	104,743	167,625	141,457	141,457	-	26,168	36,714	74%
3500 Unemployment Insurance	3,019	1,068	759	5,779	10,989	10,381	9,338	1,043	1,650	3,559	62%
3600 Workers Comp Insurance	2,166	625	2,025	11,431	12,801	12,590	12,547	43	255	1,116	91%
3900 403b contribution	4	63	8	109	353	353	353	-	-	244	31%
SUBTOTAL - Employee Benefits	43,051	38,390	19,740	292,924	421,514	393,245	391,783	1,462	29,731	98,859	75%
Books & Supplies											
4100 Approved Textbooks & Core Curricula Materials	2,698	-	80	19,983	9,596	40,322	54,843	(14,521)	(45,247)	34,860	36%
4200 Books & Other Reference Materials	42	-	-	7,104	7,620	14,360	61,967	(47,607)	(54,347)	54,863	11%
4300 Materials & Supplies	325	37	-	405	2,300	2,300	2,300	-	-	1,895	18%
4320 Educational Software	143	-	-	7,753	400	7,753	7,753	-	(7,353)	(0)	100%
4325 Instructional Materials & Supplies	-	-	86	3,609	5,600	5,600	5,600	-	-	1,991	64%
4326 Art	-	-	-	-	400	400	400	-	-	400	0%
4330 Office Supplies	40	97	457	2,425	7,339	7,339	7,339	-	-	4,914	33%
4335 PE Supplies	-	-	-	-	400	400	400	-	-	400	0%
4346 Teacher Supplies	205	33	353	3,148	5,200	5,200	5,200	-	-	2,052	61%
4355 Science	-	-	-	-	400	400	400	-	-	400	0%
4356 Recess Supplies	-	-	-	-	1,200	1,200	1,200	-	-	1,200	0%
4410 Classroom Furniture, Equipment & Supplies	-	-	494	2,033	3,000	3,000	3,000	-	-	967	68%
4420 Computers: individual items less than \$5k	-	885	392	5,413	6,000	6,000	6,000	-	0	587	90%
4430 Non Classroom Related Furniture, Equipment & Supplies	6	108	-	1,577	2,000	2,000	8,000	(6,000)	(6,000)	6,423	20%
4710 Student Food Services	-	-	-	-	2,027	2,027	2,000	27	27	2,000	0%
4720 Other Food	-	-	-	31	806	806	250	556	556	219	12%
SUBTOTAL - Books and Supplies	3,459	1,160	1,862	53,481	54,288	99,106	166,652	(67,546)	(112,365)	113,171	32%
Services & Other Operating Expenses											
5215 Travel - Mileage, Parking, Tolls	-	-	-	-	600	-	-	-	600	-	
5220 Travel and Lodging	-	-	-	-	2,500	-	-	-	2,500	-	
5225 Travel - Meals & Entertainment	-	-	-	-	370	-	-	-	370	-	

**BOA**  
**Income Statement**  
**As of Mar FY2021**

		Actual			YTD	Budget						
		Jan	Feb	Mar	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
5515	Janitorial, Gardening Services & Supplies	1,199	-	1,620	4,747	3,326	3,326	5,964	(2,638)	(2,638)	1,217	80%
5525	Utilities - Waste	-	-	-	-	3,313	3,313	3,313	-	-	3,313	0%
5610	Rent	22,168	22,168	22,168	199,512	274,015	274,015	274,015	-	-	74,504	73%
5615	Repairs and Maintenance - Building	-	-	-	180	5,000	5,000	5,000	-	-	4,820	4%
5824	District Oversight Fees	-	-	-	-	22,943	24,094	24,084	10	(1,142)	24,084	0%
5830	Field Trips Expenses	-	-	-	-	6,000	-	-	-	6,000	-	
5836	Fingerprinting	-	-	-	-	372	372	372	-	(0)	372	0%
5839	Fundraising Expenses	25	-	-	511	3,565	3,565	3,565	-	-	3,054	14%
5845	Legal Fees	-	-	-	-	3,060	1,060	-	1,060	3,060	-	
5848	Licenses and Other Fees	-	-	-	-	30	30	30	-	(0)	30	0%
5851	Marketing and Student Recruiting	-	362	109	541	1,872	1,872	1,872	-	-	1,331	29%
5854	Consultants - CALPADS	425	425	425	3,825	5,100	5,100	5,100	-	-	1,275	75%
5857	Payroll Fees	346	(3,973)	251	(1,386)	4,299	(184)	(184)	-	4,483	1,202	752%
5858	CMO Services	-	-	-	-	310,647	317,549	313,048	4,501	(2,401)	313,048	0%
5860	Printing and Reproduction	(717)	124	224	2,869	9,440	8,300	8,300	-	1,140	5,431	35%
5861	Prior Yr Exp (not accrued	-	-	-	2,140	500	2,140	2,140	-	(1,640)	-	100%
5863	Professional Development	-	-	186	11,843	13,000	20,713	37,713	(17,000)	(24,713)	25,870	31%
5869	Special Education Contract Instructors	1,729	1,993	-	15,023	21,090	24,090	31,180	(7,090)	(10,090)	16,157	48%
5875	Staff Recruiting	-	-	-	-	571	571	246	325	325	246	0%
5877	Student Activities	835	-	3,990	6,483	3,260	4,260	6,483	(2,223)	(3,223)	0	100%
5878	Student Assessment	-	-	-	7,737	3,072	7,737	12,737	(5,000)	(9,665)	5,000	61%
5880	Student Health Services	16	-	-	763	1,842	10,842	10,842	-	(9,000)	10,079	7%
5881	Student Information System	-	-	-	19	-	19	19	-	(19)	-	100%
5893	Transportation - Student	-	-	-	-	412	412	-	412	412	-	
5898	Bad Debt Expense	1,251	-	-	1,251	-	1,251	1,251	-	(1,251)	(0)	100%
5910	Communications - Internet / Website Fees	61	107	21	1,952	11,165	2,431	2,431	-	8,734	479	80%
5915	Postage and Delivery	32	-	-	233	1,096	867	867	-	229	634	27%
5920	Communications - Telephone & Fax	-	-	-	-	3,160	-	-	-	3,160	-	
SUBTOTAL - Services & Other Operating Exp.		27,370	21,206	28,993	258,243	715,623	722,747	750,389	(27,642)	(34,766)	492,145	34%
Capital Outlay & Depreciation												
SUBTOTAL - Capital Outlay & Depreciation		-	-	-	-	-	-	-	-	-	-	
Other Outflows												
7438	Long term debt - Interest	115	177	(80)	1,230	1,407	1,407	1,407	-	-	177	87%
SUBTOTAL - Other Outflows		115	177	(80)	1,230	1,407	1,407	1,407	-	-	177	87%
TOTAL EXPENSES		209,872	190,523	184,423	1,647,787	2,667,446	2,666,726	2,755,527	(88,801)	(88,081)	1,107,740	60%

**CMO**  
**Income Statement**  
**As of Mar FY2021**

	Actual			YTD	Budget							
	Jan	Feb	Mar	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent	
SUMMARY												
Revenue												
LCFF Entitlement	-	-	-	-	-	-	-	-	-	-	-	
Federal Revenue	-	-	58,429	58,429	-	-	58,429	58,429	58,429	-	-	100%
Other State Revenues	-	-	-	-	-	-	-	-	-	-	-	
Local Revenues	8,379	6,735	10,398	73,668	833,115	854,194	845,029	(9,165)	11,914	771,361	9%	
Fundraising and Grants	-	-	-	150	1,000	1,000	1,000	-	-	850	15%	
Total Revenue	8,379	6,735	68,827	132,247	834,115	855,194	904,458	49,264	70,343	772,211	15%	
Expenses												
Compensation and Benefits	50,102	53,355	49,729	449,370	549,894	585,471	616,803	(31,332)	(66,909)	167,433	73%	
Books and Supplies	55	-	140	2,829	14,860	15,160	20,160	(5,000)	(5,300)	17,332	14%	
Services and Other Operating Expenditures	24,014	18,822	17,504	192,242	269,361	254,563	267,495	(12,932)	1,866	75,253	72%	
Depreciation	-	-	-	-	-	-	-	-	-	-		
Other Outflows	-	-	-	-	-	-	-	-	-	-		
Total Expenses	74,171	72,177	67,373	644,441	834,115	855,194	904,458	(49,264)	(70,343)	260,018	71%	
Operating Income												
(65,792) (65,442) 1,454 (512,194) - - - - - 512,194												
Fund Balance												
Beginning Balance (Unaudited)					0	0	0					
Operating Income					-	-	-					
Ending Fund Balance												
0 0 0												
Fund Balance as a % of Expenses												
0% 0% 0%												

CMO  
Income Statement  
As of Mar FY2021

KEY ASSUMPTIONS

Enrollment Summary  
Total Enrolled

ADA %  
Average ADA %

ADA  
Total ADA

Actual			YTD	Budget						
Jan	Feb	Mar	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
				-	-	-	-	-		
				-	-	-	-	-		

**CMO**  
**Income Statement**  
**As of Mar FY2021**

Actual				YTD	Budget						
					Approved	Previous		Previous	Approved	Current	% Current
					Budget v1	Forecast	Current	Forecast vs.	Budget v1 vs.	Forecast	Forecast
							Forecast	Current	Current	Remaining	Spent

**CMO**  
**Income Statement**  
**As of Mar FY2021**

Actual			YTD	Budget						
Jan	Feb	Mar	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
<b>EXPENSES</b>										
<b>Compensation &amp; Benefits</b>										
<b>Certificated Salaries</b>										
1100 Teachers Salaries	-	-	970	-	-	-	-	-	(970)	
1150 Teacher - Interventior	1,952	1,675	14,053	18,427	18,703	18,703	-	(276)	4,650	75%
1300 Certificated Supervisor & Administrator Salaries	13,673	11,588	11,588	141,050	143,136	143,136	-	(2,086)	35,763	75%
<b>SUBTOTAL - Certificated Salaries</b>	<b>15,625</b>	<b>13,263</b>	<b>13,263</b>	<b>122,396</b>	<b>159,477</b>	<b>161,839</b>	<b>-</b>	<b>(2,362)</b>	<b>39,443</b>	<b>76%</b>
<b>Classified Salaries</b>										
2100 Classified Instructional Aide Salaries	12	-	187	-	-	-	-	-	(187)	
2400 Classified Clerical & Office Salaries	15,129	13,654	13,483	161,799	164,226	164,226	-	(2,427)	41,668	75%
2905 Other Classified - After School	10,099	17,241	17,665	118,821	157,655	186,782	(29,128)	(67,961)	52,933	72%
<b>SUBTOTAL - Classified Salaries</b>	<b>25,241</b>	<b>30,895</b>	<b>31,148</b>	<b>256,595</b>	<b>280,621</b>	<b>321,881</b>	<b>(29,128)</b>	<b>(70,388)</b>	<b>94,414</b>	<b>73%</b>
<b>Employee Benefits</b>										
3100 STRS	2,523	2,142	2,142	19,936	25,594	25,975	-	(381)	6,039	77%
3300 OASDI-Medicare-Alternative	1,061	1,337	1,474	11,319	23,842	27,033	(2,228)	(5,419)	17,942	39%
3400 Health & Welfare Benefits	3,781	4,847	(1,479)	28,998	48,400	35,364	-	13,036	6,366	82%
3500 Unemployment Insurance	907	365	289	1,904	4,410	5,063	277	(652)	3,159	38%
3600 Workers Comp Insurance	644	186	2,572	5,368	3,821	4,199	(253)	(632)	(916)	121%
3900 403b contribution	320	321	321	2,854	3,730	3,840	-	(110)	986	74%
<b>SUBTOTAL - Employee Benefits</b>	<b>9,236</b>	<b>9,197</b>	<b>5,318</b>	<b>70,380</b>	<b>109,797</b>	<b>101,751</b>	<b>(2,204)</b>	<b>5,842</b>	<b>33,575</b>	<b>68%</b>
<b>Books &amp; Supplies</b>										
4330 Office Supplies	42	-	140	888	1,500	1,250	-	250	362	71%
4352 After School Program	14	-	-	1,486	1,704	2,004	-	(300)	518	74%
4420 Computers: individual items less than \$5k	-	-	-	250	-	250	-	(250)	0	100%
4430 Non Classroom Related Furniture, Equipment & Supplies	-	-	-	-	906	906	(5,000)	(5,000)	5,906	0%
4710 Student Food Services	-	-	-	-	10,369	10,369	-	-	10,369	0%
4720 Other Food	-	-	-	205	381	381	-	-	177	54%
<b>SUBTOTAL - Books and Supplies</b>	<b>55</b>	<b>-</b>	<b>140</b>	<b>2,829</b>	<b>14,860</b>	<b>15,160</b>	<b>(5,000)</b>	<b>(5,300)</b>	<b>17,332</b>	<b>14%</b>
<b>Services &amp; Other Operating Expenses</b>										
5215 Travel - Mileage, Parking, Tolls	-	-	-	-	900	-	-	900	-	
5220 Travel and Lodging	-	-	-	-	4,162	-	-	4,162	-	
5225 Travel - Meals & Entertainment	-	-	-	-	474	-	-	474	-	
5305 Dues & Membership - Professional	448	448	448	4,055	5,400	5,400	-	-	1,345	75%
5400 Insurance	3,334	3,138	1,667	24,747	23,637	26,701	-	(3,064)	1,954	93%
5515 Janitorial, Gardening Services & Supplies	-	-	-	-	20	460	-	(440)	460	0%
5535 Utilities - All Utilities	-	-	-	-	-	756	-	(756)	756	0%
5610 Rent	-	-	-	-	-	3,600	-	(3,600)	3,600	0%
5803 Accounting Fees	1,050	-	-	6,313	12,915	12,915	-	-	6,602	49%
5809 Banking Fees	520	-	-	1,612	1,326	1,326	(674)	(674)	388	81%
5812 Business Services	13,750	13,750	13,750	123,750	165,000	165,000	-	-	41,250	75%
5820 Consultants - Non Instructional - Custom 1	-	-	180	1,875	8,500	3,186	-	5,314	1,311	59%
5833 Fines and Penalties	-	-	-	-	17	17	-	17	-	
5836 Fingerprinting	-	76	-	76	536	536	436	436	25	76%
5845 Legal Fees	2,253	1,200	825	8,774	5,100	9,100	(2,120)	(6,120)	2,446	78%
5851 Marketing and Student Recruiting	-	-	-	71	763	817	317	263	429	14%
5857 Payroll Fees	191	(1,222)	132	8,035	9,466	8,050	-	1,416	15	100%
5860 Printing and Reproduction	1,117	241	33	1,391	1,049	3,500	(5,000)	(7,451)	7,109	16%
5861 Prior Yr Exp (not accruec	-	488	-	441	7	441	-	(434)	(0)	100%
5863 Professional Development	325	448	-	3,234	6,000	3,234	(6,000)	(3,234)	6,000	35%

**CMO**  
**Income Statement**  
**As of Mar FY2021**

		Actual				YTD	Budget						
										Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
		Jan	Feb	Mar	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast					
5875	Staff Recruiting	750	15	210	2,124	2,000	2,000	2,500		(500)	(500)	376	85%
5880	Student Health Services	-	-	-	-	19,544	44	44		-	19,500	44	0%
5899	Miscellaneous Operating Expenses	-	-	-	20	191	191	191		-	-	171	10%
5910	Communications - Internet / Website Fees	-	-	12	4,659	1,815	6,211	5,197		1,015	(3,382)	538	90%
5915	Postage and Delivery	277	241	248	1,066	538	1,076	1,500		(424)	(962)	434	71%
SUBTOTAL - Services & Other Operating Exp.		24,014	18,822	17,504	192,242	269,361	254,563	267,495		(12,932)	1,866	75,253	72%
Capital Outlay & Depreciation													
SUBTOTAL - Capital Outlay & Depreciation		-	-	-	-	-	-	-		-	-	-	
Other Outflows													
SUBTOTAL - Other Outflows		-	-	-	-	-	-	-		-	-	-	
TOTAL EXPENSES		74,171	72,177	67,373	644,441	834,115	855,194	904,458		(49,264)	(70,343)	260,018	71%

**SVA**  
**Income Statement**  
**As of Mar FY2021**

	Actual			YTD	Budget							
	Jan	Feb	Mar	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent	
SUMMARY												
Revenue												
LCFF Entitlement	389,984	-	351,247	1,821,245	3,083,255	3,232,126	3,232,126	-	148,871	1,410,881	56%	
Federal Revenue	20,903	-	371,622	605,243	196,827	369,627	776,923	407,296	580,096	171,680	78%	
Other State Revenues	43,717	-	16,791	107,478	139,770	196,543	196,543	-	56,774	89,065	55%	
Local Revenues	3,516	294	615	11,907	73,523	81,716	82,168	452	8,645	70,261	14%	
Fundraising and Grants	460	234	-	6,584	20,500	15,000	15,000	-	(5,500)	8,416	44%	
Total Revenue	458,580	528	740,275	2,552,457	3,513,875	3,895,012	4,302,760	407,748	788,885	1,750,303	59%	
Expenses												
Compensation and Benefits	249,842	235,666	210,010	1,890,954	2,661,047	2,689,288	2,687,540	1,748	(26,493)	796,586	70%	
Books and Supplies	3,618	4,406	4,916	46,928	45,421	75,876	114,876	(39,000)	(69,455)	67,948	41%	
Services and Other Operating Expenditures	51,509	68,683	21,785	285,785	905,467	922,377	924,946	(2,569)	(19,479)	639,160	31%	
Depreciation	838	838	838	7,545	10,059	16,115	16,115	-	(6,056)	8,570	47%	
Other Outflows	-	-	-	-	-	-	-	-	-	-	-	
Total Expenses	305,807	309,593	237,549	2,231,212	3,621,994	3,703,655	3,743,477	(39,822)	(121,483)	1,512,265	60%	
Operating Income												
	152,772	(309,065)	502,726	321,245	(108,119)	191,357	559,283	367,926	667,402	238,038		
Fund Balance												
Beginning Balance (Unaudited)					1,058,464	1,111,406	1,111,406					
Operating Income					(108,119)	191,357	559,283					
Ending Fund Balance												
					950,345	1,302,763	1,670,689					
Fund Balance as a % of Expenses												
					26%	35%	45%					

**SVA**  
**Income Statement**  
**As of Mar FY2021**

**KEY ASSUMPTIONS**

**Enrollment Summary**

K-3

4-6

7-8

**Total Enrolled**

**ADA %**

K-3

4-6

7-8

**Average ADA %**

**ADA**

K-3

4-6

7-8

**Total ADA**

Actual			YTD	Budget						
Jan	Feb	Mar	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
				185	179	181	2	(4)		
				140	131	129	(2)	(11)		
				72	75	75	-	3		
				<b>397</b>	<b>385</b>	<b>385</b>	-	(12)		
				95.5%	95.0%	93.9%	-1.0%	-1.6%		
				95.3%	95.5%	97.0%	1.5%	1.6%		
				94.5%	96.8%	96.8%	0.0%	2.3%		
				<b>95.3%</b>	<b>95.5%</b>	<b>95.5%</b>	<b>0.0%</b>	<b>0.2%</b>		
				177.06	170.00	170.00	-	(7.06)		
				133.48	125.10	125.10	-	(8.38)		
				68.04	72.60	72.60	-	4.56		
				<b>378.58</b>	<b>367.70</b>	<b>367.70</b>	-	(10.88)		

**SVA**  
**Income Statement**  
**As of Mar FY2021**

Actual				YTD	Budget									
								Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent			
Jan	Feb	Mar	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast								
REVENUE														
LCFF Entitlement														
8011	Charter Schools General Purpose Entitlement - State Aic	178,428	-	268,219	1,180,186	2,077,385	1,979,330	1,979,330	-	(98,055)	799,144	60%		
8012	Education Protection Account Entitlemen	170,041	-	-	340,081	467,189	693,054	693,054	-	225,865	352,973	49%		
8096	Charter Schools in Lieu of Property Taxe:	41,514	-	83,028	300,978	538,681	559,742	559,742	-	21,061	258,764	54%		
SUBTOTAL - LCFF Entitlement				389,984	-	351,247	1,821,245	3,083,255	3,232,126	3,232,126	-	148,871	1,410,881	56%
Federal Revenue														
8181	Special Education - Entitlement	-	-	-	-	56,442	56,442	56,442	-	-	56,442	0%		
8291	Title I	16,073	-	-	28,016	50,555	47,537	47,537	-	(3,018)	19,521	59%		
8292	Title II	-	-	3,000	5,172	8,913	9,000	9,000	-	87	3,828	57%		
8294	Title IV	-	-	2,500	5,000	10,000	10,000	10,000	-	-	5,000	50%		
8296	SRSA Grant	-	-	366,063	399,683	29,284	33,620	399,683	366,063	370,399	0	100%		
8299	CARES Act	4,830	-	59	167,372	41,633	213,028	254,261	41,233	212,628	86,889	66%		
SUBTOTAL - Federal Revenue				20,903	-	371,622	605,243	196,827	369,627	776,923	407,296	580,096	171,680	78%
Other State Revenue														
8319	Other State Apportionments - Prior Years	-	-	-	174	-	174	174	-	174	(0)	100%		
8381	Special Education - Entitlement (State	17,378	-	16,791	53,850	51,836	87,513	87,513	-	35,677	33,663	62%		
8550	Mandated Cost Reimbursements	6,084	-	-	6,084	6,084	6,084	6,084	-	-	0	100%		
8560	State Lottery Revenue	20,255	-	-	20,255	81,850	75,657	75,657	-	(6,192)	55,402	27%		
8590	All Other State Revenue	-	-	-	27,115	-	27,115	27,115	-	27,115	-	100%		
SUBTOTAL - Other State Revenue				43,717	-	16,791	107,478	139,770	196,543	196,543	-	56,774	89,065	55%
Local Revenue														
8634	Food Service Sales	-	-	-	-	36	-	-	-	(36)	-			
8660	Interest	42	38	360	1,381	1,298	1,298	1,750	452	452	369	79%		
8689	FUA Reimbursement	-	-	-	-	69,124	69,124	69,124	-	-	69,124	0%		
8693	Field Trips	-	-	-	100	-	100	100	-	100	0	100%		
8699	All Other Local Revenue	3,473	255	255	10,396	3,065	11,164	11,164	-	8,099	767	93%		
8702	School Library	-	-	-	30	-	30	30	-	30	-	100%		
SUBTOTAL - Local Revenue				3,516	294	615	11,907	73,523	81,716	82,168	452	8,645	70,261	14%
Fundraising and Grants														
8801	Donations - Parents	100	-	-	3,600	10,000	10,000	10,000	-	-	6,400	36%		
8802	Donations - Private	360	-	-	1,668	3,500	1,668	1,668	-	(1,832)	0	100%		
8803	Fundraising	-	234	-	1,316	7,000	3,332	3,332	-	(3,668)	2,016	40%		
SUBTOTAL - Fundraising and Grants				460	234	-	6,584	20,500	15,000	15,000	-	(5,500)	8,416	44%
TOTAL REVENUE				458,580	528	740,275	2,552,457	3,513,875	3,895,012	4,302,760	407,748	788,885	1,750,303	59%

**SVA**  
**Income Statement**  
**As of Mar FY2021**

			Actual	YTD	Budget								
			Jan	Feb	Mar	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
EXPENSES													
Compensation & Benefits													
Certificated Salaries													
1100	Teachers Salaries		122,035	104,751	102,385	853,581	1,150,394	1,159,476	1,156,412	3,064	(6,018)	302,831	74%
1101	Teacher - Stipends		-	-	-	-	11,625	11,625	19,625	(8,000)	(8,000)	19,625	0%
1103	Teacher - Substitute Pay		960	2,645	2,945	12,785	20,690	20,690	20,690	-	-	7,905	62%
1111	Teacher - Specialist		9,578	9,258	13,760	96,601	139,917	140,850	135,624	5,227	4,293	39,023	71%
1148	Teacher - Special Ed		12,425	10,666	10,666	91,677	123,074	121,173	121,173	-	1,901	29,497	76%
1150	Teacher - Interventior		3,350	5,850	6,644	42,774	46,632	47,471	60,289	(12,818)	(13,657)	17,515	71%
1300	Certificated Supervisor & Administrator Salaries		20,637	17,489	17,489	162,048	209,867	213,015	213,015	-	(3,148)	50,967	76%
SUBTOTAL - Certificated Salaries			168,985	150,657	153,889	1,259,465	1,702,199	1,714,300	1,726,828	(12,528)	(24,629)	467,363	73%
Classified Salaries													
2100	Classified Instructional Aide Salaries		10,077	18,839	19,417	120,154	192,877	192,869	188,274	4,595	4,603	68,121	64%
2103	Classified - Special Education		1,107	1,801	2,834	13,584	71,602	48,042	37,833	10,210	33,769	24,249	36%
2400	Classified Clerical & Office Salaries		5,682	7,322	7,102	60,464	78,205	79,378	79,378	-	(1,173)	18,914	76%
2930	Other Classified - Maintenance/grounds		3,528	3,107	2,960	29,431	37,760	38,327	38,327	-	(566)	8,896	77%
2935	Other Classified - Substitute		330	-	-	330	595	595	595	-	-	265	55%
SUBTOTAL - Classified Salaries			20,724	31,068	32,313	223,963	381,040	359,211	344,407	14,804	36,633	120,444	65%
Employee Benefits													
3100	STRS		25,717	22,484	22,143	183,529	255,278	257,878	260,746	(2,867)	(5,467)	77,216	70%
3300	OASDI-Medicare-Alternative		7,534	5,513	5,717	42,198	61,366	59,624	58,349	1,275	3,017	16,151	72%
3400	Health & Welfare Benefits		19,622	23,543	(7,978)	157,540	228,448	265,232	265,232	-	(36,784)	107,692	59%
3500	Unemployment Insurance		4,195	1,502	1,059	8,057	13,409	13,820	12,776	1,044	632	4,719	63%
3600	Workers Comp Insurance		3,044	879	2,846	16,066	18,085	18,000	17,981	20	104	1,915	89%
3900	403b contribution		21	20	20	137	1,222	1,222	1,222	-	-	1,085	11%
SUBTOTAL - Employee Benefits			60,133	53,940	23,808	407,527	577,808	615,777	616,305	(529)	(38,497)	208,779	66%
Books & Supplies													
4100	Approved Textbooks & Core Curricula Materials		-	-	-	2,771	1,000	7,167	7,167	-	(6,167)	4,396	39%
4200	Books & Other Reference Materials		-	-	-	4,428	5,038	5,038	5,038	-	0	610	88%
4300	Materials & Supplies		-	-	206	1,740	665	4,665	4,665	-	(4,000)	2,925	37%
4320	Educational Software		2,045	960	20	9,119	1,423	9,139	9,139	(0)	(7,716)	20	100%
4325	Instructional Materials & Supplies		-	159	-	1,465	6,500	6,500	5,500	1,000	1,000	4,035	27%
4326	Art		4	11	724	2,561	2,000	2,000	3,000	(1,000)	(1,000)	439	85%
4330	Office Supplies		551	279	701	5,004	12,322	12,322	11,322	1,000	1,000	6,318	44%
4335	PE Supplies		322	-	804	2,127	1,000	1,323	2,323	(1,000)	(1,323)	196	92%
4346	Teacher Supplies		305	912	230	8,067	8,200	15,810	15,810	-	(7,610)	7,743	51%
4410	Classroom Furniture, Equipment & Supplies		391	-	-	3,625	1,000	4,235	10,235	(6,000)	(9,235)	6,609	35%
4420	Computers: individual items less than \$5k		-	1,698	-	1,791	5,000	5,000	25,000	(20,000)	(20,000)	23,209	7%
4430	Non Classroom Related Furniture, Equipment & Supplies		-	386	2,232	4,187	550	1,956	14,956	(13,000)	(14,406)	10,768	28%
4720	Other Food		-	-	-	43	723	723	723	-	-	680	6%
SUBTOTAL - Books and Supplies			3,618	4,406	4,916	46,928	45,421	75,876	114,876	(39,000)	(69,455)	67,948	41%
Services & Other Operating Expenses													
5210	Conference Fees		-	-	-	-	179	179	179	-	-	179	0%
5215	Travel - Mileage, Parking, Tolls		-	-	-	-	1,000	-	-	-	1,000	-	-
5220	Travel and Lodging		-	-	-	-	1,000	-	-	-	1,000	-	-
5225	Travel - Meals & Entertainment		-	-	-	-	400	-	-	-	400	-	-
5515	Janitorial, Gardening Services & Supplies		543	-	1,733	5,226	4,101	4,101	6,726	(2,625)	(2,625)	1,499	78%
5525	Utilities - Waste		384	299	299	2,467	11,016	11,016	8,400	2,616	2,616	5,933	29%
5610	Rent		16,748	16,748	16,748	150,734	208,979	208,979	208,979	-	-	58,245	72%

**SVA**  
**Income Statement**  
**As of Mar FY2021**

		Actual			YTD	Budget						
		Jan	Feb	Mar	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
5615	Repairs and Maintenance - Building	-	-	-	-	5,000	5,000	5,000	-	-	5,000	0%
5809	Banking Fees	-	-	27	27	677	677	355	322	322	328	8%
5824	District Oversight Fees	-	-	-	-	30,833	32,321	32,321	-	(1,489)	32,321	0%
5830	Field Trips Expenses	-	-	-	-	6,462	-	-	-	6,462	-	
5833	Fines and Penalties	-	70	17	88	149	149	149	-	-	62	59%
5836	Fingerprinting	-	-	-	-	273	273	273	-	-	273	0%
5839	Fundraising Expenses	35	-	-	602	6,447	6,447	6,447	-	-	5,845	9%
5845	Legal Fees	-	-	-	-	3,060	1,060	-	1,060	3,060	-	
5848	Licenses and Other Fees	-	-	-	-	3,515	-	-	-	3,515	-	
5851	Marketing and Student Recruiting	-	362	109	568	1,791	1,791	1,791	-	-	1,223	32%
5854	Consultants - CALPADS	425	425	425	3,825	5,100	5,100	5,100	-	-	1,275	75%
5857	Payroll Fees	392	(5,189)	350	(1,779)	6,514	617	(499)	1,116	7,013	1,280	356%
5858	CMO Services	-	-	-	-	431,657	441,281	435,025	6,255	(3,369)	435,025	0%
5860	Printing and Reproduction	568	919	1,430	9,290	16,523	15,496	15,319	177	1,204	6,029	61%
5861	Prior Yr Exp (not accrued	-	-	-	38	-	38	38	-	(38)	0	100%
5863	Professional Development	179	149	186	1,648	15,820	15,820	15,820	-	-	14,172	10%
5869	Special Education Contract Instructors	2,388	2,753	-	15,654	20,100	23,100	35,100	(12,000)	(15,000)	19,446	45%
5875	Staff Recruiting	-	-	-	-	918	918	918	-	-	918	0%
5877	Student Activities	-	-	-	-	5,000	5,000	5,000	-	-	5,000	0%
5878	Student Assessment	-	-	-	7,492	4,536	7,492	7,492	-	(2,956)	(0)	100%
5880	Student Health Services	65	-	431	2,281	3,927	13,927	13,927	-	(10,000)	11,646	16%
5881	Student Information System	-	-	-	19	-	19	19	-	(19)	-	100%
5887	Technology Services	-	-	-	-	510	510	-	510	510	-	
5893	Transportation - Student	27,192	45,000	-	72,192	93,848	102,192	102,192	-	(8,344)	30,000	71%
5898	Bad Debt Expense	2,480	7,000	-	9,481	-	9,480	9,480	-	(9,480)	(0)	100%
5910	Communications - Internet / Website Fees	69	147	29	5,104	12,985	6,246	8,246	(2,000)	4,740	3,141	62%
5915	Postage and Delivery	40	-	-	827	1,148	1,148	1,148	-	-	321	72%
5920	Communications - Telephone & Fax	-	-	-	-	2,000	2,000	-	2,000	2,000	-	
SUBTOTAL - Services & Other Operating Exp.		51,509	68,683	21,785	285,785	905,467	922,377	924,946	(2,569)	(19,479)	639,160	31%
Capital Outlay & Depreciation												
6900	Depreciation	838	838	838	7,545	10,059	16,115	16,115	-	(6,056)	8,570	47%
SUBTOTAL - Capital Outlay & Depreciation		838	838	838	7,545	10,059	16,115	16,115	-	(6,056)	8,570	47%
Other Outflows												
SUBTOTAL - Other Outflows		-	-	-	-	-	-	-	-	-	-	
TOTAL EXPENSES		305,807	309,593	237,549	2,231,212	3,621,994	3,703,655	3,743,477	(39,822)	(121,483)	1,512,265	60%

**BOA**  
**Monthly Cash Forecast**  
**As of Mar FY2021**

	2020-21													
	Actuals & Forecast													
	Jul Actuals	Aug Actuals	Sep Actuals	Oct Actuals	Nov Actuals	Dec Actuals	Jan Actuals	Feb Actuals	Mar Actuals	Apr Forecast	May Forecast	Jun Forecast	Forecast	Remaining Balance
Beginning Cash	503,985	478,347	416,867	394,923	538,582	547,413	533,356	537,566	392,738	798,106	400,487	291,935		
REVENUE														
LCFF Entitlement	-	77,968	95,725	186,146	164,018	164,018	174,308	-	301,230	150,753	92,057	91,362	2,408,429	910,845
Federal Revenue	-	-	17,998	79,650	12,793	-	14,620	-	256,664	-	15,930	54,253	499,103	47,196
Other State Revenue	82	-	-	19,479	5,970	-	24,415	-	9,077	(82)	19,267	-	136,954	58,746
Other Local Revenue	96	164	163	163	489	163	163	432	336	351	366	63,348	66,236	-
Fundraising & Grants	-	-	-	-	583	388	145	-	-	3,295	3,295	3,295	11,000	-
TOTAL REVENUE	179	78,132	113,886	285,438	183,853	164,569	213,651	432	567,308	154,316	130,914	212,258	3,121,722	1,016,787
EXPENSES														
Certificated Salaries	18,489	108,291	99,745	100,994	107,805	99,677	118,042	102,626	106,944	103,963	105,601	115,802	1,187,978	-
Classified Salaries	6,472	8,633	21,507	21,493	24,853	24,574	17,835	26,964	26,964	25,231	27,559	25,231	257,317	-
Employee Benefits	16,932	32,014	32,890	36,035	37,404	36,468	43,051	38,390	19,740	31,832	32,708	34,319	391,783	-
Books & Supplies	12,708	3,508	7,443	11,004	11,055	1,282	3,459	1,160	1,862	29,593	27,789	55,789	166,652	-
Services & Other Operating Expenses	29,580	28,429	26,203	37,159	28,654	30,649	27,370	21,206	28,993	303,457	60,102	85,416	750,389	43,171
Capital Outlay & Depreciation	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other Outflows	-	-	-	785	130	103	115	177	(80)	177	-	-	1,407	-
TOTAL EXPENSES	84,181	180,875	187,788	207,471	209,901	192,753	209,872	190,523	184,423	494,253	253,760	316,557	2,755,527	43,171
Operating Cash Inflow (Outflow)	(84,002)	(102,743)	(73,902)	77,967	(26,048)	(28,184)	3,780	(190,091)	382,884	(339,937)	(122,845)	(104,299)	366,195	973,616
Revenues - Prior Year Accruals	197,979	10,146	22,685	45,342	7,529	-	8,876	(9,623)	-	-	-	-	-	-
Other Assets	10,400	-	-	-	(154)	-	(4)	-	-	-	-	-	-	-
Expenses - Prior Year Accruals	7,973	9,935	(8,767)	9,935	9,935	9,935	9,935	19,168	8,939	(488)	(469)	(89,876)	-	-
Accounts Payable - Current Year	(130,093)	8,806	21,110	1,818	9,316	(5,134)	(27,112)	26,944	(2,922)	(53,124)	-	-	-	-
Summerholdback for Teachers	(39,965)	306	4,861	4,860	4,516	5,589	4,999	5,038	4,397	3,859	3,859	3,859	-	-
Loans Payable (Long Term)	-	-	-	(8,333)	(8,333)	(8,333)	(8,333)	(8,333)	-	(8,333)	-	-	-	-
Other Liabilities	12,070	12,070	12,070	12,070	12,070	12,070	12,070	12,070	12,070	403	10,903	10,903	-	-
Ending Cash	478,347	416,867	394,923	538,582	547,413	533,356	537,566	392,738	798,106	400,487	291,935	112,523		

**CMO**  
**Monthly Cash Forecast**  
**As of Mar FY2021**

	2020-21													
	Actuals & Forecast													
	Jul Actuals	Aug Actuals	Sep Actuals	Oct Actuals	Nov Actuals	Dec Actuals	Jan Actuals	Feb Actuals	Mar Actuals	Apr Forecast	May Forecast	Jun Forecast	Forecast	Remaining Balance
Beginning Cash	684,165	620,244	566,401	496,522	414,715	357,188	295,669	227,936	166,038	(498,702)	(529,361)	(537,418)		
REVENUE														
LCFF Entitlement	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Federal Revenue	-	-	-	-	-	-	-	-	58,429	-	-	-	58,429	-
Other State Revenue	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other Local Revenue	3,418	195	4,762	13,304	16,394	10,083	8,379	6,735	10,398	70,102	70,102	631,157	845,029	-
Fundraising & Grants	-	-	-	150	-	-	-	-	-	589	261	-	1,000	-
TOTAL REVENUE	3,418	195	4,762	13,454	16,394	10,083	8,379	6,735	68,827	70,691	70,363	631,157	904,458	-
EXPENSES														
Certificated Salaries	12,986	14,881	12,216	13,263	13,263	13,638	15,625	13,263	13,263	12,918	13,263	13,263	161,839	-
Classified Salaries	12,756	17,987	36,118	38,386	32,877	31,186	25,241	30,895	31,148	30,979	32,635	30,800	351,009	-
Employee Benefits	6,288	6,077	6,590	10,013	8,222	9,436	9,236	9,197	5,318	20,539	8,072	4,965	103,955	-
Books & Supplies	384	1,356	443	297	153	-	55	-	140	2,720	2,071	2,172	20,160	10,369
Services & Other Operating Expenses	24,092	18,936	21,872	28,187	20,525	18,289	24,014	18,822	17,504	26,925	22,478	25,851	267,495	-
Capital Outlay & Depreciation	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other Outflows	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL EXPENSES	56,507	59,237	77,239	90,147	75,040	72,549	74,171	72,177	67,373	94,081	78,517	77,050	904,458	10,369
Operating Cash Inflow (Outflow)	(53,089)	(59,042)	(72,477)	(76,693)	(58,646)	(62,466)	(65,792)	(65,442)	1,454	(23,390)	(8,154)	554,107	-	(10,369)
Other Assets	1,634	-	-	-	-	-	-	(1,900)	-	-	-	-	-	-
Expenses - Prior Year Accruals	(168)	-	-	-	-	-	-	1,838	-	-	-	-	-	-
Accounts Payable - Current Year	(9,274)	5,198	2,485	(5,231)	1,012	820	(4,690)	3,498	(596)	(7,367)	-	-	-	-
Summerholdback for Teachers	(3,023)	-	115	116	107	128	2,749	108	4,702	98	98	98	-	-
Loans Payable (Long Term)	-	-	-	-	-	-	-	-	(670,300)	-	-	-	-	-
Ending Cash	620,244	566,401	496,522	414,715	357,188	295,669	227,936	166,038	(498,702)	(529,361)	(537,418)	16,787		

**SVA**  
**Monthly Cash Forecast**  
**As of Mar FY2021**

	2020-21													
	Actuals & Forecast													
	Jul Actuals	Aug Actuals	Sep Actuals	Oct Actuals	Nov Actuals	Dec Actuals	Jan Actuals	Feb Actuals	Mar Actuals	Apr Forecast	May Forecast	Jun Forecast	Forecast	Remaining Balance
Beginning Cash	976,880	1,027,846	943,329	890,284	1,295,085	1,338,913	1,315,915	1,534,884	1,292,410	1,726,101	1,651,526	1,454,270		
REVENUE														
LCFF Entitlement	-	99,127	130,263	410,740	219,943	219,943	389,984	-	351,247	326,982	85,464	84,914	3,232,126	913,520
Federal Revenue	-	-	33,620	162,483	16,615	-	20,903	-	371,622	5,753	16,634	40,137	776,923	109,157
Other State Revenue	174	-	-	34,144	12,652	-	43,717	-	16,791	-	35,842	-	196,543	53,223
Other Local Revenue	2,594	331	357	1,782	2,120	298	3,516	294	615	379	69,503	379	82,168	-
Fundraising & Grants	10	579	15	602	246	4,438	460	234	-	2,805	2,805	2,805	15,000	-
TOTAL REVENUE	2,778	100,037	164,254	609,751	251,576	224,678	458,580	528	740,275	335,919	210,248	128,235	4,302,760	1,075,900
EXPENSES														
Certificated Salaries	17,489	142,387	158,268	155,620	150,616	161,553	168,985	150,657	153,889	150,784	155,569	161,010	1,726,828	-
Classified Salaries	7,023	12,768	29,472	30,485	30,811	29,299	20,724	31,068	32,313	39,436	41,675	39,333	344,407	-
Employee Benefits	28,167	48,636	51,111	49,886	49,353	42,492	60,133	53,940	23,808	73,376	66,364	69,039	616,305	-
Books & Supplies	1,552	7,851	7,359	5,610	9,639	1,977	3,618	4,406	4,916	26,747	20,600	20,600	114,876	-
Services & Other Operating Expenses	21,443	23,064	21,780	24,438	30,505	22,579	51,509	68,683	21,785	90,455	79,173	418,777	924,946	50,755
Capital Outlay & Depreciation	-	-	-	-	-	5,030	838	838	838	1,343	1,343	5,884	16,115	-
Other Outflows	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL EXPENSES	75,675	234,706	267,990	266,039	270,924	262,930	305,807	309,593	237,549	382,141	364,724	714,644	3,743,477	50,755
Operating Cash Inflow (Outflow)	(72,896)	(134,669)	(103,736)	343,712	(19,348)	(38,251)	152,772	(309,065)	502,726	(46,222)	(154,476)	(586,409)	559,283	1,025,145
Revenues - Prior Year Accruals	581,606	-	29,451	41,612	27,419	2,500	70,973	(10,825)	(80,075)	81,027	-	-	-	
Other Assets	3,325	-	-	-	(267)	-	(4)	-	-	-	-	-	-	
Fixed Assets	-	-	-	-	-	5,030	838	838	(2,115)	(50,204)	(53,157)	5,884	-	
Expenses - Prior Year Accruals	(139,931)	8,527	(20,084)	11,736	11,736	11,736	11,736	28,332	9,891	(903)	(870)	(106,478)	-	
Accounts Payable - Current Year	(255,536)	24,267	29,365	(4,200)	13,389	(15,494)	(28,442)	36,344	(4,773)	(69,519)	-	-	-	
Summerholdback for Teachers	(70,359)	12,601	7,202	7,184	6,142	6,725	6,339	7,144	3,278	6,489	6,489	6,489	-	
Other Liabilities	4,757	4,757	4,757	4,757	4,757	4,757	4,757	4,757	4,757	4,757	4,757	4,757	-	
Ending Cash	1,027,846	943,329	890,284	1,295,085	1,338,913	1,315,915	1,534,884	1,292,410	1,726,101	1,651,526	1,454,270	778,514		