

# Update Guidesheets

## October 2018 Update Guidesheet

28.25

\*\*\*Note: Descriptions below identify revisions made to CSBA's sample board policies, administrative regulations, board bylaws, and/or exhibits. Editorial changes have also been made. Districts and county offices of education should review the sample materials and modify their own policies accordingly.\*\*\*

### Charter School Renewal

(BP revised) Policy updated to reflect NEW LAW (AB 1808) which requires alternative measures for meeting the student achievement criteria for charter renewal in lieu of the Academic Performance Index (API) and NEW LAW (AB 406) which prohibits a charter school that is renewed on or after July 1, 2019 from being operated as a for-profit corporation or organization. Policy also clarifies that district boards do not review renewal petitions for charter schools that were authorized by county boards on appeal, and addresses the definition of "receipt" of the petition for purposes of determining the timeline for granting or denying the petition.  
See BP 0420.42

### Communication with the Public

(BP revised) Policy updated to add definition of the types of mass mailings that cannot be sent at district expense and to reflect law which prohibits certain mass mailings, which are otherwise permissible, from being sent within 60 days preceding an election. Policy also deletes references to repealed Title 2 regulation (Register 2018, No. 12).  
See BP 1100

### Gifts, Grants and Bequests

(BP revised) Policy updated to add new section on "Online Fundraising" addressing considerations for approving a crowdfunding Internet platform to raise funds for district, school, or classroom projects or equipment. Policy also adds a prohibition against accepting any gift, grant, or bequest that promotes the use of non-nutritious foods or beverages and provides that any advertising used by a corporate sponsor meet the standards specified in BP 1325 - Advertising and Promotion.  
See BP 3290

## Claims and Actions Against the District

(AR revised) Regulation updated to reflect NEW LAW (SB 1053) which clarifies that districts do not have the authority to use district-established claims procedures for claims of childhood sexual abuse and that such claims are governed by the timelines and procedures of Code of Civil Procedure 340.1.

See AR 3320

## Financial Reports and Accountability

(AR revised) Regulation updated to add new section on "Report on Expenditures of State Facilities Funds" reflecting state law, as amended by NEW LAW (AB 1808), which requires districts that receive state facilities funding under the Leroy F. Greene School Facilities Act to annually report a list of expenditures for completed facilities projects and conclude an audit within one year of project completion.

See AR 3460

## Transfers

(BP revised) Policy updated to delete provision regarding a principal's right to refuse a teacher's transfer request for a school ranked in deciles 1-3 on the API, as the API is no longer being calculated. Policy also adds philosophical statement regarding the assignment of staff in an equitable manner that meets the needs of students and each school.

See BP 4114

## School Health Services

(BP/AR revised) Policy updated to delete references to the obsolete API, Healthy Start program, and Healthy Families program. Regulation updated to expand section on "Types of Health Services" to include additional services for which districts can receive Medi-Cal reimbursement. Regulation also includes the requirement for employees to complete a random-moment time study for the Medi-Cal Administrative Activities program and reflects NEW LAW (AB 3192) which requirements the Department of Health Care Services to develop a program guide for the LEA Medi-Cal Billing Option.

See BP 5141.6

See AR 5141.6

## Suspension and Expulsion/Due Process

(BP/AR revised) Policy and regulation updated to reflect NEW LAW (AB 752, 2017) which prohibits the expulsion of a child enrolled in a California State Preschool Program (CSPP) unless the district has taken specified steps and the child's continued enrollment presents a serious safety threat to the child or other enrolled children. Policy also adds data collection on the type of firearm involved in any expulsion for firearm possession, in accordance with federal law. Regulation also revises section on "Final Action by the Board" to correct the location in policy where acts requiring "mandatory recommendation and mandatory expulsion" are listed.

See BP 5144.1

See AR 5144.1

## Preschool/Early Childhood Education

(BP/AR revised) Policy updated to reflect NEW LAW (AB 1808) which (1) exempts CSPP programs from specified licensure and regulation requirements if they are operated in a school building and (2) requires that the district's Williams uniform complaint procedures be used to resolve allegations of deficiencies related to health and safety requirements in license-exempt CSPP programs. Policy and regulation reflect a provision of AB 1808 which allows districts to commingle 4-year-old children enrolled in a CSPP program with children enrolled in a transitional kindergarten (TK) program under specified conditions. Regulation also reflects NEW LAW (AB 2626) which changes the birthdate by which children are eligible for CSPP programs, NEW LAW (AB 273, 2017) which revises eligibility criteria for CSPP preschool to include parents/guardians engaged in an educational program for English learners or for attainment of a high school diploma or general educational development certificate, and NEW LAW (AB 752, 2017) which prohibits the expulsion or unenrollment of a child enrolled in a CSPP program unless the district has taken specified steps and the child's continued enrollment presents a serious safety threat to the child or other enrolled children.

See BP 5148.3

See AR 5148.3

## Civic Education

(BP revised) Policy updated to add new section on "Student Voter Registration" containing material formerly in BP 1400 - Relations Between Governmental Agencies and the Schools. Policy also reflects NEW LAW (AB 24, 2017) which establishes the State Seal of Civic Engagement to recognize high school graduates who have demonstrated excellence in civic education and participation based on criteria to be approved by the State Board of Education by January 31, 2021. Examples of activities that link civic knowledge to practical experience expanded to reflect additional concepts in the state curriculum framework.

See BP 6142.3

## Athletic Competition

(BP/AR revised) Policy updated to reflect NEW LAW (AB 2009) which requires any district that offers an interscholastic athletic program to develop a written emergency action plan to be followed in the event of sudden cardiac arrest or other medical emergency. Regulation updated to reflect requirement of AB 2009 to make an automated external defibrillator available at athletic events. Regulation also includes new section on "Heat Illness" reflecting NEW LAW (AB 2800) which requires coaching education programs to include training on the signs and symptoms of, and appropriate response to, heat illness.

See BP 6145.2

See AR 6145.2

## Placement in Mathematics Courses

(BP revised; AR added) Policy updated to clarify which policy components are mandated and to expand program evaluation to include a report on the percentage of students who have successfully completed mathematics courses that satisfy the requirements for entrance to the University of California and California State University. New regulation includes material formerly in BP, including the appeals process, the requirement to post the policy on the district's web site, and circumstances under which staff recommendations may be considered in course placement. Regulation also includes examples of objective academic measures that may be used to place students in mathematics courses.

See BP 6152.1

See AR 6152.1

## Transitional Kindergarten

(BP revised) Policy updated to reflect NEW LAW (AB 1808) which allows districts to place 4-year-old children enrolled in a CSPP program into a TK program and to commingle children from both programs into the same classroom under specified conditions.

See BP 6170.1

## Career Technical Education

(BP/AR revised) Policy updated to reflect NEW FEDERAL LAW (P.L. 115-224) which reauthorizes the Carl D. Perkins Career and Technical Education Act, retitled as the Strengthening Career and Technical Education for the 21st Century Act, and NEW LAW (AB 1808) which amends the California Career Technical Education Incentive Grant Program. Material regarding activities for special populations and consultation with private school representatives moved to AR. Material on program evaluation revised to add requirement to review measures of career technical education pathway completion as part of the annual review of progress toward the goals in the local control and accountability plan (LCAP). Regulation

revises section on "Federal Grants for Career Technical Education (Perkins)" to reflect P.L. 115-224, including streamlining the uses of grant funds, adding a requirement for a needs assessment, and changing the definition of "special needs populations." Regulation also deletes section on "Tech Prep Programs" as those programs are no longer funded and are repealed by P.L. 115-224. Section on "Linked Learning Programs" deletes Note regarding linked learning pilot program which repealed on its own terms.

See BP 6178

See AR 6178

## Evaluation of the Instructional Program

(BP revised) Policy updated to delete references to the obsolete API and add the California School Dashboard as a source for multiple state and local indicators of strengths and areas in need of improvement in each priority area addressed by the LCAP. Section on "Federal Program Monitoring" deleted as the focus of the policy is on program effectiveness rather than compliance with program requirements.

See BP 6190

## Terms of Office

(BB revised) Bylaw updated to reflect NEW LAW (AB 2449) which changes the commencement of the term of office of board members from the first Friday in December following their election to the second Friday in December. Bylaw also provides that, if the district chooses or is required to consolidate its board elections with the local municipal or state primary or general elections, elections could occur in even-numbered years and the term of incumbent board members would be extended to align with the next election.

See BB 9110

## Payables Prelist

10/15/18 ()

PSD

## Check

320 - Don Croll		
PO 19-00089-10/4/2018	12-9011-0-8500-1000-4300-200-3020	\$1,818.09
		<hr/>
		\$1,818.09
166 - PALACE ART & STATIONERY		
PO 19-00117-10/15/18	01-1100-0-1110-1000-4300-200-3000	\$49.67
		<hr/>
		\$49.67
285 - Santa Cruz Community Credit Union		
PO 19-00115-10/11/18	13-5310-0-0000-3700-4700-200-3101	\$80.37
PO 19-00115-10/11/18	01-0000-0-0000-8100-4370-200-2801	\$6.54
PO 19-00115-10/11/18	01-1100-0-1110-1000-4300-200-3000	\$111.40
PO 19-00115-10/11/18	13-5310-0-0000-3700-4390-200-3101	\$41.40
PO 19-00115-10/11/18	01-1100-0-1110-1000-4100-200-3000	\$685.50
PO 19-00118-10/11/2018	01-0000-0-0000-2700-4350-200-2801	\$151.24
PO 19-00118-10/11/2018	01-1100-0-1110-1000-4100-200-3000	\$552.60
PO 19-00118-10/11/2018	01-1100-0-1110-1000-4300-205-3000	\$468.05
		<hr/>
		\$2,097.10
268 - Seabright Speech Therapy		
PO 19-00116-10/11/2018	01-3310-0-5770-1190-5808-200-1320	\$2,115.00
		<hr/>
		\$2,115.00
273 - Terra X Pest Services		
PO 19-00114-10/11/2018	01-0000-0-0000-8100-5524-200-2801	\$324.00
		<hr/>
		\$324.00
		<hr/>
	<b>Payment Type Check Total</b>	<b>\$6,403.86</b>

**Payables Prelist****10/15/18 ()****PSD****Grand Total :****\$6,403.86****Amount**

Fund 01

\$4,464.00

Fund 12

\$1,818.09

Fund 13

\$121.77

**Grand Total :****\$6,403.86**-----  
PRESIDENT-----  
SECRETARY

PREPARED BY: -----

DATE: -----

REVIEWED BY: -----

DATE: -----

**Payables Prelist****Locked-10/22/2018 ()****PSD****Check**

321 - Academic Therapy Publications

PO 19-00120-10/22/18

01-6500-0-5770-3120-4300-200-1304

\$142.56

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\$142.56

171 - EDD

PO 19-00123-10/22/18

01-0000-0-0000-0000-9515-000-0000

\$60.60

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\$60.60

310 - Great West Gourmet

PO 19-00122-10/22/2018

13-5310-0-0000-3700-4700-200-3101

\$594.00

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\$594.00

66 - Emelia Miguel

PO 19-00119-10/22/18

13-9055-0-0000-3700-4300-200-9055

\$14.68

PO 19-00119-10/22/18

13-9055-0-0000-3700-5800-200-9055

\$17.42

PO 19-00119-10/22/18

13-5310-0-0000-3700-4390-200-3101

\$20.00

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\$52.10

309 - SYSCO

PO 19-00121-10/22/2018

13-5310-0-0000-3700-4700-200-3101

\$766.20

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\$766.20

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**Payment Type Check Total****\$1,615.46**



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Grand Total :		\$1,615.46
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**Amount**

Fund 01	\$203.16
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Fund 13	\$1,412.30
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Grand Total :		\$1,615.46
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PRESIDENT-----  
SECRETARY

PREPARED BY: ----- DATE: -----

REVIEWED BY: ----- DATE: -----

## Payables Prelist

10/31/2018 ()

PSD

## Check

39 - AT&amp;T

PO 19-00134-10/31/2018

01-0000-0-0000-2700-5900-200-2801

\$104.10

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\$104.10

282 - Bumgarner, Dona

PO 19-00130-10/31/2018

01-0102-0-1110-2420-4210-200-2391

\$74.30

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\$74.30

79 - Lerner, Joan

PO 19-00132-10/31/2018

01-6500-0-5770-3140-5808-200-1304

\$1,207.50

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\$1,207.50

66 - Emelia Miguel

PO 19-00133-10/31/2018

13-5310-0-0000-3700-4700-200-3101

\$43.47

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\$43.47

55 - ROBERTSON &amp; ASSOC. CPAS INC

PO 19-00135-10/31/2018

01-0000-0-0000-7191-5809-200-2801

\$1,300.00

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\$1,300.00

268 - Seabright Speech Therapy

PO 19-00136-10/31/2018

01-3310-0-5770-1190-5808-200-1320

\$2,655.00

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\$2,655.00

309 - SYSCO

PO 19-00131-10/31/2018

01-0000-0-0000-8100-4370-200-2801

\$114.96

PO 19-00131-10/31/2018

13-5310-0-0000-3700-4390-200-3101

\$477.31

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\$592.27

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**Payment Type Check Total****\$5,976.64**

**Payables Prelist****10/31/2018 ()****PSD****Grand Total :****\$5,976.64****Amount**

Fund 01

\$5,455.86

Fund 13

\$520.78

**Grand Total :****\$5,976.64**-----  
PRESIDENT-----  
SECRETARY

PREPARED BY: ----- DATE: -----

REVIEWED BY: ----- DATE: -----

**Payables Prelist****11/5/2018 ()****PSD****Check****116 - MISSION LINEN SERVICE**

PO 19-00138-11/5/2018	13-5310-0-0000-3700-4390-200-3101	\$41.40
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**\$41.40****82 - SISC - SELF-INSURED SCHOOLS**

PO 19-00139-11/5/2018	01-0000-0-0000-0000-9514-000-0000	\$8,178.40
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PO 19-00139-11/5/2018	12-0000-0-0000-0000-9514-000-0000	\$1,934.10
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PO 19-00139-11/5/2018	13-0000-0-0000-0000-9514-000-0000	\$460.50
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**\$10,573.00****309 - SYSCO**

PO 19-00137-11/5/2018	13-5310-0-0000-3700-4700-200-3101	\$575.33
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PO 19-00137-11/5/2018	01-0000-0-0000-8100-4370-200-2801	\$73.50
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PO 19-00137-11/5/2018	13-5310-0-0000-3700-4390-200-3101	\$26.18
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**\$675.01****Payment Type Check Total**

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**\$11,289.41**

**Payables Prelist****11/5/2018 ()****PSD**

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**Grand Total :** **\$11,289.41****Amount**

Fund 01 \$8,251.90

Fund 12 \$1,934.10

Fund 13 \$1,103.41

**Grand Total :** **\$11,289.41**-----  
PRESIDENT-----  
SECRETARY

PREPARED BY: \_\_\_\_\_ DATE: \_\_\_\_\_

REVIEWED BY: \_\_\_\_\_ DATE: \_\_\_\_\_

## Payables Prelist

11/9/2018 ()

PSD

## Check

## 255 - Central Coast System

PO 19-00142-11/9/2018

01-0000-0-0000-8100-5563-200-2801

\$105.00

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\$105.00

## 310 - Great West Gourmet

PO 19-00141-11/9/2018

13-5310-0-0000-3700-4700-200-3101

\$494.00

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\$494.00

## 55 - ROBERTSON &amp; ASSOC. CPAS INC

PO 19-00143-11/9/2018

01-0000-0-0000-7191-5809-200-2801

\$1,269.00

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\$1,269.00

## 285 - Santa Cruz Community Credit Union

PO 19-00145-11/9/2018

13-5310-0-0000-3700-4700-200-3101

\$274.57

PO 19-00145-11/9/2018

01-9010-0-1110-1000-4300-204-3056

\$321.42

PO 19-00145-11/9/2018

01-0000-0-0000-2700-4350-200-2801

\$70.00

PO 19-00145-11/9/2018

01-1100-0-1110-1000-4300-200-3000

\$352.81

PO 19-00145-11/9/2018

01-0000-0-0000-8100-4370-200-2801

\$66.42

PO 19-00145-11/9/2018

01-9010-0-1110-1000-5800-204-3056

\$1,975.00

PO 19-00145-11/9/2018

13-5310-0-0000-3700-4390-200-3101

\$41.40

PO 19-00145-11/9/2018

01-0000-0-0000-2700-5915-200-2801

\$50.00

PO 19-00145-11/9/2018

01-0000-0-0000-8100-5620-200-2801

\$19.95

PO 19-00145-11/9/2018

01-6500-0-5770-3120-4300-200-1304

\$142.56

PO 19-00145-11/9/2018

01-1100-0-1110-1000-4100-200-3000

\$1,422.43

PO 19-00145-11/9/2018

01-1100-0-1110-1000-4300-203-3000

\$96.00

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\$4,832.56

## 309 - SYSCO

PO 19-00140-11/9/2018

13-5310-0-0000-3700-4390-200-3101

\$169.56

PO 19-00140-11/9/2018

01-0000-0-0000-8100-4370-200-2801

\$171.94

PO 19-00140-11/9/2018

13-5310-0-0000-3700-4700-200-3101

\$508.42

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\$849.92

## 315 - Zoom Imaging Solutions, Inc.

PO 19-00144-11/9/2018

01-0000-0-0000-7200-5650-200-2801

\$80.32

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\$80.32

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**Payment Type Check Total****\$7,630.80**

**Payables Prelist****11/9/2018 ()****PSD****Grand Total :****\$7,630.80****Amount**

Fund 01

\$6,142.85

Fund 13

\$1,487.95

**Grand Total :****\$7,630.80**-----  
PRESIDENT-----  
SECRETARY

PREPARED BY: ----- DATE: -----

REVIEWED BY: ----- DATE: -----

# **CSBA Sample**

## **Administrative Regulation**

### **Claims And Actions Against The District**

AR 3320

#### **Business and Noninstructional Operations**

\*\*\*Note: The Government Claims Act (Government Code 810-996.6) sets forth prelitigation requirements and deadlines for claims against public entities, including school districts. In *City of Stockton v. Superior Court*, the California Supreme Court held that the claim requirements in Government Code 900-915.4 also apply to claims for breach of contract.\*\*\*

\*\*\*Note: Because a district's insurance carrier or joint powers authority (JPA) may require the district to comply with certain claims management conditions as part of the district's contractual coverage obligation, it is strongly recommended that this administrative regulation be reviewed for consistency with any applicable conditions of coverage. A district's failure to follow those contractual conditions may result in a loss of coverage benefits. The district's risk manager and legal counsel should also be consulted, as appropriate.\*\*\*

#### **Time Limitations**

\*\*\*Note: Items #1-4 below list timelines for claims pursuant to the Government Claims Act and other applicable statutes. As amended by SB 1053 (Ch. 153, Statutes of 2018), Government Code 935 clarifies that the authority of a district to adopt local claims presentation procedures for causes of action which are excepted from the Government Claims Act by Government Code 905 and are not governed by other statutes or regulations does not apply to childhood sexual abuse. Rather, claims for childhood sexual abuse are governed by the timelines and procedures specified in Code of Civil Procedure 340.1.\*\*\*

The following time limitations apply to claims against the district:

1. Claims for money or damages relating to any cause of action which is governed by a statute or regulation, including childhood sexual abuse and other causes of action specifically excepted from the Government Claims Act by Government Code 905, shall be filed in accordance with the governing statute or regulation. (Government Code 905, 935)

\*\*\*Note: Pursuant to Government Code 935, a district may establish its own procedure for the presentation of those claims which are excluded from the Government Claims Act as specified in Government Code 905. Optional item #2 below is for use by any district whose board has chosen to exercise the authority to establish district procedures for such claims; see the accompanying Board policy. Item #2 provides six months as the time limitation for filing such claims, which is consistent with the requirement in Government Code 935 that the district's procedure not require a shorter time for presentation of a claim than the time specified in Government Code 911.2. However, the Governing Board has the discretion to adopt a more flexible time limitation and may increase the amount of time allowed for filing such claims. If the Board adopts a more



flexible time limitation, item #2 should be revised accordingly.\*\*\*

\*\*\*Note: If a claimant misses a deadline for a claim required to be submitted in accordance with item #2 or #3 below, he/she may present an application to present a late claim pursuant to Government Code 911.4; see section below entitled "Late Claims." \*\*\*

2. In accordance with the Board's authority pursuant to Government Code 935, claims for money or damages which relate to any cause of action specifically excepted from the Government Claims Act by Government Code 905 but which are not governed by any other claims presentation statute or regulation shall be filed not later than six months after the accrual of the cause of action. (Government Code 905, 935)

3. Claims for money or damages relating to a cause of action for death or for injury to person, personal property, or growing crops shall be presented to the Governing Board not later than six months after the accrual of the cause of action. (Government Code 911.2)

4. Claims for money or damages relating to any other cause of action shall be filed not later than one year after the accrual of the cause of action. (Government Code 911.2)

#### Receipt of Claims

A claim, any amendment thereto, or an application to present a late claim shall be deemed presented and received when delivered to the district office or deposited in a post office, mailbox, sub-post office, substation, mail chute, or other similar facility maintained by the U.S. government, in a sealed envelope properly addressed to the district office with postage paid, or when otherwise actually received in the district office or by the Board secretary or clerk. (Government Code 915, 915.2)

\*\*\*Note: In most circumstances, a district's insurance provider or JPA is responsible for claims management, including investigating, defending, and managing a district's response to a claim presented under the Government Claims Act. The following paragraph requires the Superintendent or designee to immediately forward any claims received to the district's JPA or insurance provider in order to help ensure compliance with any conditions of coverage.\*\*\*

Upon receipt of a claim against the district pursuant to the Government Claims Act, the Superintendent or designee shall promptly provide written notice to the district's joint powers authority or insurance carrier in accordance with the applicable conditions of coverage.

#### Review of Contents of the Claim

\*\*\*Note: Most JPAs and insurance carriers provide a claim form. The person submitting the claim need not use the claim form provided by the district, but, pursuant to Government Code 910 and 910.2, the claim must contain a signature and all of the information listed below.\*\*\*

The Superintendent or designee shall review any claim received to ensure that the claim contains all of the following information as specified in Government Code 910 and 910.2:

1. The name and post office address of the claimant

2. The post office address to which the person presenting the claim desires notices to be sent
3. The date, place, and other circumstances of the occurrence or transaction which gave rise to the claim asserted
4. A general description of the indebtedness, obligation, injury, damage, or loss incurred insofar as it may be known at the time of presentation of the claim
5. The name(s) of the district employee(s) causing the injury, damage, or loss if known
6. The amount claimed if it totals less than \$10,000, including the estimated amount of any prospective injury, damage, or loss, insofar as it may be known at the time of the claim, together with the basis of computation of the amount claimed. If the amount claimed exceeds \$10,000, the dollar amount shall not be included in the claim and the claimant shall indicate whether the claim is a limited civil case.
7. The signature of the claimant or the person acting on his/her behalf

#### Notice of Claim Insufficiency

\*\*\*Note: Pursuant to Government Code 911, if the district, or the JPA or insurance carrier acting on the district's behalf, fails to give notice that the claim is insufficient, as specified below, then the district may not later raise that issue as a defense to the claim.\*\*\*

If a claim is found insufficient or not to satisfy the form requirements under Government Code 910 and 910.2, the Board or its designee shall, within 20 days of receipt of the claim, personally deliver or mail to the claimant, at the address stated in the claim or application, a notice that states the particular defects or omission in the claim. (Government Code 910.8, 915.4)

\*\*\*Note: Districts should be cautious before rejecting a claim because of insufficiency of information and consult legal counsel and/or the district's JPA or insurance provider, as appropriate. Courts have held that a claim is sufficient as long as enough information is disclosed to allow the district to adequately conduct an investigation of the claim's merits.\*\*\*

The Board shall not act upon the claim until at least 15 days after such notice is given. (Government Code 910.8)

#### Amendment to Claims

Within the time limits provided in the section "Time Limitations" above or prior to final action by the Board, whichever is later, a claim may be amended if, as amended, it relates to the same transaction or occurrence which gave rise to the original claim. (Government Code 910.6)

#### Late Claims

\*\*\*Note: The reference to item #2 in the following paragraph should be deleted if the district has not established district procedures pursuant to Government Code 935 for claims that are

specifically exempted in Government Code 905 or adopted a time limitation that is not less than one year (see the accompanying Board policy and item #2 in the section "Time Limitations" above). \*\*\*

For claims under items #2 and #3 in the section "Time Limitations" above, any person who presents a claim later than six months after the accrual of the cause of action shall present, along with the claim, an application to present a late claim. Such claim and the application to present a late claim shall be presented not later than one year after the accrual of the cause of action. (Government Code 905, 911.4)

\*\*\*Note: If the claim is presented late and is not accompanied by an application to present a late claim, the Board or its agent should notify the claimant that "no action" was taken because the claim was presented late. If the Board were to state that the claim was "rejected," this would indicate that the Board had accepted the filing of the late claim and taken action to reject it.\*\*\*

If the claim is presented late and is not accompanied by an application to present a late claim, the Board or its designee may, within 45 days, give written notice that the claim was not presented timely and that it is being returned without further action. (Government Code 911.3)

The Board shall grant or deny the application to present a late claim within 45 days after it is presented. This 45-day period may be extended by written agreement of the claimant and the Board provided that such agreement is made before the expiration of the 45-day period. (Government Code 911.6)

The Board shall grant the application to present a late claim where one or more of the following conditions are applicable: (Government Code 911.6)

1. The failure to present the claim was through mistake, inadvertence, surprise, or excusable neglect and the district was not prejudiced in its defense regarding the claim by the claimant's failure to present the claim within the time limit.
2. The person who sustained the alleged injury, damage, or loss was a minor during all of the time specified for presentation of the claim.
3. The person who sustained the alleged injury, damage, or loss was physically or mentally incapacitated during all of the time specified for presentation of the claim and the disability was the reason he/she failed to present the claim.
4. The person who sustained the alleged injury, damage, or loss died before the expiration of the time specified for the presentation of the claim.

If the application to present a late claim is denied, the claimant shall be given notice in substantially the same form as set forth in Government Code 911.8. (Government Code 911.8)

If the Board does not take action on the application to present a late claim within 45 days, the application shall be deemed to have been denied on the 45th day unless the time period has been extended, in which case it shall be denied on the last day of the period specified in the extension agreement. (Government Code 911.6)

## Action on Claims

\*\*\*Note: If the Board formally acts to reject a claim and provides notice of such rejection, the claimant has only six months from the rejection to initiate a lawsuit. If the Board takes no action, the claim is considered to be rejected, but the claimant then has two years to initiate a suit against the district. The notice of rejection must comply with the notification requirements of Government Code 913 unless the claim has no address on it.\*\*\*

\*\*\*Note: Although the Board takes final action on claims as specified below, such action is based on the evaluation of the claim by the district's insurance provider or JPA.\*\*\*

Within 45 days after the presentation or amendment of a claim, the Board shall take action on the claim. This time limit may be extended by written agreement between the district and the claimant before the expiration of the 45-day period. If the 45-day period has expired, the time limit may be extended if legal action has not commenced or been barred by legal limitations. (Government Code 912.4)

The Board may act on the claim in one of the following ways: (Government Code 912.4, 912.6)

1. If the Board finds that the claim is not a proper charge against the district, the claim shall be rejected.
2. If the Board finds that the claim is a proper charge against the district and is for an amount justly due, the claim shall be allowed.
3. If the Board finds that the claim is a proper charge against the district but is for an amount greater than is justly due, the Board shall either reject the claim or allow it in the amount justly due and reject it as to the balance.
4. If legal liability of the district or the amount justly due is disputed, the Board may reject or compromise the claim.
5. If the Board takes no action on the claim, the claim shall be deemed rejected.

If the Board allows the claim in whole or in part or compromises the claim and the claimant accepts the amount allowed or offered to settle the claim, the Board may require the claimant to accept it in settlement of the entire claim. (Government Code 912.6)

The Board or its designee shall transmit to the claimant written notice of action taken or of inaction which is deemed rejection. The notice shall be in the form set forth in Government Code 913 and shall either be personally delivered or mailed to the address stated in the claim or application. (Government Code 913, 915.4)

# **CSBA Sample**

## **Administrative Regulation**

### **Financial Reports And Accountability**

AR 3460

#### **Business and Noninstructional Operations**

##### **Interim Reports**

\*\*\*Note: Education Code 42130 requires that the district issue two interim fiscal reports; see the accompanying Board policy for information about the use of these reports to certify whether the district will be able to meet its fiscal obligations for the remainder of the fiscal year and, based on current forecasts, for the two subsequent fiscal years.\*\*\*

Each interim fiscal report developed pursuant to Education Code 42130 shall include an assessment of the district budget as revised to reflect current information regarding the adopted state budget, district property tax revenues, if any, and ending balances for the preceding fiscal year. (Education Code 42130, 42131)

\*\*\*Note: Interim reports must be based on the criteria and standards adopted by the State Board of Education (SBE) pursuant to Education Code 33127. These criteria and standards are specified in 5 CCR 15453-15464 and address the areas listed below.\*\*\*

The interim reports shall be based on State Board of Education (SBE) criteria and standards which address fund and cash balances, reserves, deficit spending, estimation of average daily attendance (ADA), projected enrollment, ratio of ADA to enrollment, projected local control funding formula (LCFF) revenue, salaries and benefits, other revenues and expenditures, and facilities maintenance. For purposes of assessing projections of LCFF revenue, the first interim report shall be compared to the adopted district budget, and the second interim report shall be compared to the projections in the first interim report. (Education Code 42130; 5 CCR 15453-15464)

(cf. 3100 - Budget)

(cf. 3220.1 - Lottery Funds)

(cf. 3300 - Expenditures and Purchases)

(cf. 3314 - Payment for Goods and Services)

The report shall also provide supplemental information regarding contingent liabilities, use of one-time revenues for ongoing expenditures, contingent revenues, contributions (i.e., projected contributions from unrestricted general fund resources to restricted general fund resources, projected transfers to or from the general fund to cover operating deficits in the general fund or any other fund, and capital project cost overruns that may impact the general fund budget), long-term commitments, unfunded liabilities, temporary interfund borrowings, the status of labor agreements, and the status of other funds. (Education Code 42130; 5 CCR 15453, 15464)

(cf. 3110 - Transfer of Funds)

## Audit Report

\*\*\*Note: Pursuant to Education Code 41020, each year the district is required to arrange for an independent audit of all the district's funds. The audit must be approved by the Governing Board and submitted to the County Superintendent of Schools, California Department of Education (CDE), and State Controller within specified timelines. See the accompanying Board policy.\*\*\*

The Superintendent or designee shall establish a timetable for the completion and review of the annual audit within the deadlines established by law.

\*\*\*Note: The following paragraph is optional. Governmental Accounting Standards Board (GASB) Statement 34 contains requirements for the contents of the district's annual audited financial reports.\*\*\*

The Superintendent or designee shall provide the necessary financial records and cooperate with the auditor selected by the Governing Board to ensure that the audit report contains all information required by law and the Governmental Accounting Standards Board (GASB).

\*\*\*Note: Pursuant to Education Code 41020, the audit must include an audit of income and expenditures for all district funds, as provided below. Additionally, Education Code 41020 requires that the audit include a determination of whether funds were expended in accordance with the district's local control and accountability plan (LCAP). Pursuant to Education Code 52061, the annual update to the LCAP must list expenditures for specific actions to be taken to achieve the goals in the LCAP, including expenditures for services to English learners, foster youth, and students eligible for free and reduced-price meals. See BP/AR 0460 - Local Control and Accountability Plan for requirements pertaining to the LCAP.\*\*\*

The audit shall include an audit of income and expenditures by source of funds for all funds of the district, including the student body and cafeteria funds and accounts, state and federal grant funds, and any other funds under the control or jurisdiction of the district, as well as an audit of student attendance procedures. The audit shall also include a determination of whether LCFF funds were expended in accordance with the district's local control and accountability plan or an approved annual update of the plan. (Education Code 41020)

(cf. 0460 - Local Control and Accountability Plan)

(cf. 3230 - Federal Grant Funds)

(cf. 3430 - Investing)

(cf. 3451 - Petty Cash Funds)

(cf. 3452 - Student Activity Funds)

(cf. 3551 - Food Service Operations/Cafeteria Fund)

\*\*\*Note: The following optional paragraph is for use by districts that elect to participate in the school district of choice program (Education Code 48300-48316); see BP/AR 5117 - Interdistrict Attendance. Pursuant to Education Code 48301, any district that elects to participate in the school district of choice program must ensure that its annual financial audit includes a review of the district's compliance with program requirements to establish a random, unbiased process for

student admittance and to provide appropriate and factually accurate parent/guardian communications.\*\*\*

If the district participates in the school district of choice program to accept interdistrict transfers, the Superintendent or designee shall notify the auditor, prior to the commencement of the audit, that the audit must include a review of the district's compliance with specified program requirements. (Education Code 48301)

(cf. 5117 - Interdistrict Attendance)

\*\*\*Note: Pursuant to Education Code 41344 and 41344.1, the district may appeal to the Education Audit Appeals Panel (EAAP) when an audit finding requires the district to repay an apportionment or pay a penalty. If the EAAP finds that there has been substantial compliance with the law, it may waive or reduce repayments or order other remedial measures to induce future compliance.\*\*\*

If an audit finding results in the district being required to repay an apportionment or pay a penalty, the district may appeal the finding to the Education Audit Appeals Panel by making an informal summary appeal within 30 days of receiving the final audit report or initiating a formal appeal within 60 days of receiving the report. (Education Code 41344, 41344.1)

While a public accounting firm is performing the audit of the district, it shall not provide any nonauditing, management, or other consulting services for the district except as provided in Government Auditing Standards, Amendment #3, published by the U.S. Government Accountability Office. (Education Code 41020)

#### Report on Expenditures of State Facilities Funds

\*\*\*Note: Pursuant to Education Code 41024, as added by AB 99 (Ch. 15, Statutes of 2017) and amended by AB 1808 (Ch. 32, Statutes of 2018), districts that receive state facilities funding pursuant to the Leroy F. Greene School Facilities Act (Education Code 17070.10-17079.30) must annually report a detailed list of all expenditures of state funds, including interest, and of the district's matching funds for completed projects. Education Code 41024 requires that an audit of completed facilities projects be submitted within one year of project completion. \*\*\*

\*\*\*Note: Education Code 41024 requires CDE to provide the Office of Public School Construction with a copy of the audit identifying any adjustments to be made in grant funding as a result of the audit findings. The district may appeal any finding in accordance with the timelines and process specified in Education Code 41344. \*\*\*

When the district participates in the school facilities program pursuant to Education Code 17070.10-17079.30, the Superintendent or designee shall annually report a detailed list of all expenditures of state facilities funds, including interest, and of the district's matching funds for completed projects until all such funds are expended. The report shall identify expenditures on a project-by-project basis, reflect completed projects that were reimbursed within that fiscal year, and clearly indicate the list of projects that have been completed. (Education Code 41024; 2 CCR 1859.104)

Audits of facilities projects shall be concluded within one year of project completion, and shall be included as part of the district's audit for the fiscal year in which the project is reported as completed. A project shall be deemed completed when any of the following conditions is met: (Education Code 41024; 2 CCR 1859.104)

1. When the notice of completion for the project has been filed, all outstanding invoices, claims, and change orders have been satisfied, and the facility is currently in use by the district
2. Three years from the date of the final fund release for an elementary school project
3. Four years from the date of the final fund release for a middle or high school project

#### Fund Balance

\*\*\*Note: The following optional section reflects GASB Statement 54, which addresses the manner in which fund balances in the general fund must be reported in external financial reports. Pursuant to GASB 54, the Board has sole authority to specify purposes of committed funds (item #3 below) and also must express, or delegate the authority to express, intended purposes of resources resulting in the assigned fund balance (item #4 below); see BP 3100 - Budget. \*\*\*

In accordance with GASB Statement 54, external financial reports shall report fund balances in the general fund within the following classifications based on the relative strength of constraints placed on the purposes for which resources can be used:

1. Nonspendable fund balance, including amounts that are not expected to be converted to cash, such as resources that are not in a spendable form or are legally or contractually required to be maintained intact
2. Restricted fund balance, including amounts constrained to specific purposes by their providers or by law
3. Committed fund balance, including amounts constrained to specific purposes by the Board
4. Assigned fund balance, including amounts which the Board or its designee intends to use for a specific purpose
5. Unassigned fund balance, including amounts that are available for any purpose

#### Negative Balance Report

\*\*\*Note: When applicable, Education Code 42127.5 requires districts to report the reasons for a negative unrestricted fund balance or negative cash balance. "Unrestricted funds" are any funds that are not constrained by law to be spent on specific purposes and which therefore may be spent as the Board deems appropriate. Such funds may be reported in the committed fund balance, assigned fund balance, or unassigned fund balance as provided in items #3-5 in the section "Fund Balance" above.\*\*\*



Whenever the district reports a negative unrestricted fund balance or a negative cash balance in its annual budget or annual audit report, it shall include in the budget a statement that identifies the reasons for the negative unrestricted fund balance or negative cash balance and the steps that have been taken to ensure that the negative balance will not occur at the end of the current fiscal year. (Education Code 42127.5)

#### Non-Voter-Approved Debt Report

\*\*\*Note: The following section addresses notices regarding the issuance of revenue bonds, certificates of participation, and other non-voter-approved debts. Pursuant to Education Code 17150 and 17150.1, the County Superintendent and county auditor may, within 15 days of receiving these notices from the district, comment publicly to the Board regarding the capability of the district to repay the debt obligation.\*\*\*

\*\*\*Note: Pursuant to Education Code 42133, a district that has a qualified or negative certification in any fiscal year cannot issue non-voter-approved debt in that fiscal year or in the next fiscal year unless the County Superintendent determines that the district's repayment of the debt is probable.\*\*\*

Upon approval by the Board to proceed with the issuance of revenue bonds or any agreement for financing school construction pursuant to Education Code 17170-17199.5, the Superintendent or designee shall notify the County Superintendent of Schools and the county auditor. The Superintendent or designee shall provide the Board, the county auditor, the County Superintendent, and the public with related repayment schedules and evidence of the district's ability to repay the obligation. (Education Code 17150)

(cf. 3470 - Debt Issuance and Management)  
(cf. 7214 - General Obligation Bonds)

When the Board is considering the issuance of certificates of participation and other debt instruments that are secured by real property and do not require the approval of the voters of the district, the Superintendent or designee shall provide notice to the County Superintendent and county auditor no later than 30 days before the Board's approval to proceed with issuance. The Superintendent or designee shall provide the Board, the county auditor, the County Superintendent, and the public with information necessary to assess the anticipated effect of the debt issuance, including related repayment schedules, evidence of the district's ability to repay the obligation, and the issuance costs. (Education Code 17150.1)

#### Other Postemployment Benefits Report

\*\*\*Note: The following section reflects GASB Statement 75, which contains reporting requirements pertaining to "other postemployment benefits" (OPEBs) (i.e., medical, dental, vision, hearing, life insurance, long-term care, long-term disability, and other nonpension benefits for retired employees). Under GASB 75, districts that do not provide OPEB through a trust are required to report the total unfunded liability (i.e., OPEBs that are not prefunded), as calculated in the most recent actuary report, in the district's financial statements. The decision of whether to prefund the benefits, and by how much, is at the Board's discretion; see BP 3100 - Budget.\*\*\*

\*\*\*Note: The SBE's criteria and standards for budget adoption (5 CCR 15440-15451) require districts to estimate unfunded OPEBs as well as the unfunded portion of any self-insured benefits program. Changes to the unfunded liabilities are disclosed at interim reporting periods pursuant to 5 CCR 15453 and 15464. These reports are included in the state's standardized account code structure software used to develop budget and interim reports.\*\*\*

\*\*\*Note: CSBA's OPEB Solutions Program provides access to qualified actuaries and consultants and a GASB 75-compliant trust to prefund future obligations. See CSBA's web site for further information.\*\*\*

\*\*\*Note: The following optional section may be revised to reflect district practice and should be deleted by districts that do not provide OPEBs.\*\*\*

In accordance with GASB Statement 75, the district's financial statements shall report the expense of nonpension other postemployment benefits (OPEBs) on an accrual basis over retirees' active working lifetime, as determined by a qualified actuary procured by the Superintendent or designee. To the extent that these OPEBs are not prefunded, the district shall report a liability on its financial statements.

(cf. 4154/4254/4354 - Health and Welfare Benefits)

(cf. 9250 - Remuneration, Reimbursement and Other Benefits)

The Superintendent or designee shall annually present the estimated accrued but unfunded cost of OPEBs and the actuarial report upon which those costs are based at a public meeting of the Board. (Education Code 42140)

\*\*\*Note: Pursuant to GASB 75, the district must arrange for an actuary to update the valuation of its OPEB obligations every two years. However, GASB 75 includes an option for the use of a specified alternative method in lieu of an actuarial valuation for purposes of determining the total OPEB liability for benefits provided through an OPEB plan with fewer than 100 members. Such districts may modify the following paragraph to reflect district practice.\*\*\*

The district's financial obligation for OPEBs shall be reevaluated every two years in accordance with GASB 75.

#### Workers' Compensation Claims Report

\*\*\*Note: The following optional section is for use by districts that are self-insured for workers' compensation claims, either individually or as part of a joint powers agency. See BP 3100 - Budget for provisions related to funding the estimated accrued cost of workers' compensation claims.\*\*\*

The Superintendent or designee shall annually provide the Board, at a public meeting, information and related actuarial reports showing the estimated accrued but unfunded cost of workers' compensation claims. The estimate of costs shall be based on an actuarial report completed at least every three years by a qualified actuary. (Education Code 42141)

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# **CSBA Sample**

## **Administrative Regulation**

### **School Health Services**

AR 5141.6

#### **Students**

#### Types of Health Services

\*\*\*Note: The following optional section may be revised to reflect district practice.\*\*\*

In accordance with student and community needs and available resources, school health services offered by the district may include, but are not limited to:

1. Health screenings, evaluations, and assessments of students' need for health services
2. Physical examinations, immunizations, and other preventive medical services

(cf. 5141.26 - Tuberculosis Testing)  
(cf. 5141.3 - Health Examinations)  
(cf. 5141.31 - Immunizations)  
(cf. 5141.32 - Health Screening for School Entry)

3. First aid and administration of medications

(cf. 5141.21 - Administering Medication and Monitoring Health Conditions)

4. Diagnosis and treatment of minor injuries and acute medical conditions
5. Management of chronic medical conditions

(cf. 5141.23 - Asthma Management)

6. Basic laboratory tests

7. Emergency response procedures

(cf. 5141 - Health Care and Emergencies)

8. Nutrition services

(cf. 3550 - Food Service/Child Nutrition Program)  
(cf. 5030 - Student Wellness)

9. Oral health services that may include preventive services, basic restorative services, and

referral to specialty services

\*\*\*Note: Pursuant to Health and Safety Code 104830-104865, elementary and secondary students must be offered an opportunity each school year to receive a topical application of fluoride or other decay-inhibiting agent by a dentist or dental assistant, under a program organized and operated by the county health officer. Districts are required to cooperate with the county health officer in carrying out the program in any school in their jurisdiction and to provide notification to parents/guardians regarding the availability of the program, as provided below.\*\*\*

The Superintendent or designee shall notify all parents/guardians of the opportunity pursuant to Health and Safety Code 104830-104865 for their child to receive the topical application of fluoride, including fluoride varnish, or other decay-inhibiting agent to the teeth during the school year. Such application of fluoride or other decay-inhibiting agent shall only be provided to a student whose parent/guardian returns the notification with an indication consenting to the treatment. (Health and Safety Code 104830, 104850, 104855)

(cf. 5145.6 - Parental Notifications)

10. Mental health services, which may include assessments, crisis intervention, counseling, treatment, and referral to a continuum of services including emergency psychiatric care, community support programs, inpatient care, and outpatient programs

(cf. 5141.52 - Suicide Prevention)

(cf. 6164.2 - Counseling/Guidance Services)

11. Substance abuse prevention and intervention services

(cf. 5131.6 - Alcohol and Other Drugs)

(cf. 5131.62 - Tobacco)

(cf. 5131.63 - Steroids)

12. Vision and audiology services

13. Speech therapy

14. Occupational therapy

15. Physical therapy

\*\*\*Note: Item #16 may be deleted by districts that offer only elementary grades.\*\*\*

16. Reproductive health services

(cf. 5141.25 - Availability of Condoms)

17. Specialized health care services for students with disabilities

(cf. 5141.24 - Specialized Health Care Services)

(cf. 6159 - Individualized Education Program)

18. Medical transportation
19. Targeted case management
20. Referrals and linkage to services not offered on-site
21. Public health and disease surveillance
22. Individual and family health education
23. School or districtwide health promotion

#### Medi-Cal Billing

\*\*\*Note: The following optional section is for use by districts that have contracted with the California Department of Health Care Services (DHCS) in order to provide services as a Medi-Cal provider as authorized by Welfare and Institutions Code 14132.06; see the accompanying Board policy. To the extent that the district contracts with health care practitioners or clinics to provide the services, the practitioner or clinic is considered the provider of services and is the entity billing and receiving Medi-Cal payments for services.\*\*\*

\*\*\*Note: Welfare and Institutions Code 14115.8, as amended by AB 3192 (Ch. 658, Statutes of 2018), requires DHCS, by January 1, 2020, to develop and distribute a program guide containing information regarding processes, documentation, and the proper submission of claims under the LEA Medi-Cal Billing Option program.\*\*\*

In order to provide services as a Medi-Cal provider, the district shall enter into and maintain a contract with the California Department of Health Care Services (DHCS). (Welfare and Institutions Code 14132.06; 22 CCR 51051, 51270)

\*\*\*Note: With the exception of health care aides who provide specialized physical health care services pursuant to Education Code 49423.5, any practitioner whom the district employs or with whom it contracts must be credentialed to practice as a physician, registered nurse, psychologist, school counselor, or one of the other professions listed in 22 CCR 51190.3 in order for the district to receive Medi-Cal reimbursement.\*\*\*

The Superintendent or designee shall ensure that all practitioners employed by or under contract with the district possess the appropriate license, certification, registration, or credential and provide only those services that are within their scope of practice. (22 CCR 51190.3, 51270, 51491)

\*\*\*Note: Reimbursement under Medi-Cal is limited to the services specified in Welfare and Institutions Code 14132.06 and 22 CCR 51190.4 and 51360. Pursuant to Welfare and Institutions Code 14132.06, services may be reimbursable whether or not the student has an individualized education program (IEP) or individualized family service plan (IFSP) or whether those same services are provided at no charge to the beneficiary or to the community at large.\*\*\*

\*\*\*Note: 22 CCR 51360 provides that services for accompanying a student off campus for nursing or school health aide services will be reimbursable when specified as medically necessary in an IEP or IFSP.\*\*\*

The Superintendent or designee shall submit a claim for Medi-Cal reimbursement whenever the district provides a Medi-Cal-eligible student under age 22 and/or a member of the student's family a covered service specified in 22 CCR 51190.4 or 51360. (Welfare and Institutions Code 14132.06; 22 CCR 51096, 51098, 51190.1, 51190.4, 51309, 51360, 51535.5)

The district shall maintain records and supporting documentation including, but not limited to, records of the type and extent of services provided to a Medi-Cal beneficiary in accordance with law. (22 CCR 51270, 51476)

(cf. 3580 - District Records)

(cf. 5125 - Student Records)

\*\*\*Note: 22 CCR 51270 requires federal reimbursements to be reinvested in health and social services for students and their families, as provided below. This requirement does not apply to reimbursements received under the Medi-Cal Administrative Activities (MAA) program described in the following section.\*\*\*

Any federal funds received by the district as reimbursement for the costs of services under the Medi-Cal billing option shall be reinvested in approved services for students and their families. The Superintendent or designee shall consult with a local school-linked services collaborative group regarding decisions on reinvestment of federal funds. (22 CCR 51270)

\*\*\*Note: 22 CCR 51270 requires that districts submit an annual report, as described below, as a condition of continued participation as a Medi-Cal provider. The deadline for this annual report is specified in the program provider participation agreement that districts enter into with DHCS.\*\*\*

The Superintendent or designee shall submit an annual report to DHCS to identify participants in the community collaborative, provide a financial summary including reinvestment expenditures, and describe service priorities for the future. (22 CCR 51270)

#### Medi-Cal Administrative Activities

\*\*\*Note: The following optional section is for use by districts that participate in the MAA program administered by DHCS pursuant to Welfare and Institutions Code 14132.47. Under this program, districts providing Medi-Cal-covered health services may be reimbursed for some of their administrative and outreach costs. This section reflects program requirements described in the California School-Based Medi-Cal Administrative Activities Manual published by DHCS.\*\*\*

\*\*\*Note: Districts may receive assistance with Medi-Cal administrative billing through CSBA's Practi-Cal program. See CSBA's web site for further information.\*\*\*

The district shall apply for reimbursement for activities identified by DHCS which are related to the administration of the Medi-Cal program. Such activities include, but are not be limited to,

outreach, translation for Medi-Cal services, facilitation of applications, arrangement of nonemergency and nonmedical transportation of eligible individuals, program planning and policy development, claims coordination and administration, training, and general administration.

Appropriate staff shall receive training in administrative claiming categories and related activities.

\*\*\*Note: The district must submit claims through either a local educational agency consortium (i.e., one of the service regions of the California County Superintendent Educational Services Association) or a local governmental agency (i.e., county or chartered city) that has contracted with DHCS. The district may modify the following two paragraphs to reflect the appropriate entity or agency.\*\*\*

To receive reimbursement for Medi-Cal administrative activities, the Superintendent or designee shall, on a quarterly basis, submit an invoice to the local educational consortium or local governmental agency through which the district has contracted.

\*\*\*Note: The MAA program requires randomly selected employees who perform MAA activities as a normal part of their job duties to complete a random-moment time study which is used to determine the work effort of all time study participants over a given time period. Further information regarding the required procedure is available on the DHCS web site.\*\*\*

In addition, the Superintendent or designee shall submit to the local educational consortium or local governmental agency, and shall update each quarter, a roster of all employees who perform direct Medi-Cal services or administrative activities. When notified by the local educational consortium or local governmental agency of the date and time that a random-moment time survey must be conducted by a particular employee, the Superintendent or designee shall coordinate the completion and submission of the survey in accordance with DHCS timelines and procedures.

The Superintendent or designee shall maintain an audit file containing random-moment time survey documentation and other records specified by DHCS. Such documentation shall be kept for three years after the end of the quarter in which expenditures were incurred or, if an audit is in progress, until the completion of the audit.



Santa Cruz County  
Assessed Valuations by District

District	2013-14	% Change	2014-15	% Change	2015-16	% Change	2016-17	% Change	2017-18	% Change	2018-19	% Change
Bonny Doon	\$501,254,473	3.2%	\$531,471,795	6.0%	\$558,775,140	5.1%	\$581,754,157	4.1%	\$619,175,678	6.4%	<b>\$664,302,930</b>	7.3%
Happy Valley	\$239,880,185	2.9%	\$255,243,680	6.4%	\$270,183,708	5.9%	\$280,813,295	3.9%	\$294,849,401	5.0%	<b>\$316,553,797</b>	7.4%
Live Oak	\$2,912,637,175	3.9%	\$3,077,204,771	5.7%	\$3,283,520,634	6.7%	\$3,472,566,089	5.8%	\$3,710,926,078	6.9%	<b>\$3,933,653,568</b>	6.0%
Mountain	\$225,887,840	5.9%	\$238,272,171	5.5%	\$248,866,832	4.4%	\$259,631,310	4.3%	\$270,361,786	4.1%	<b>\$286,980,405</b>	6.1%
Pacific	\$106,475,100	-0.9%	\$112,925,745	6.1%	\$117,464,217	4.0%	\$129,291,659	10.1%	\$135,742,897	5.0%	<b>\$149,966,774</b>	10.5%
Scotts Valley	\$3,192,134,276	3.2%	\$3,399,776,232	6.5%	\$3,626,083,606	6.7%	\$3,828,538,209	5.6%	\$4,066,316,984	6.2%	<b>\$4,331,157,425</b>	6.5%
Soquel	\$4,297,349,123	3.5%	\$4,611,812,391	7.3%	\$4,889,861,846	6.0%	\$5,141,498,635	5.1%	\$5,413,125,581	5.3%	<b>\$5,728,300,023</b>	5.8%
San Lorenzo Valley	\$2,724,036,953	4.2%	\$2,970,495,492	9.0%	\$3,253,358,122	9.5%	\$3,420,574,009	5.1%	\$3,609,623,024	5.5%	<b>\$3,862,800,399</b>	7.0%
SCCOE/CSSF	\$33,053,095,902	3.8%	\$35,400,304,738	7.1%	\$37,662,826,590	6.4%	\$39,557,776,749	5.0%	\$41,829,502,593	5.7%	<b>\$44,436,895,207</b>	6.2%
SCCS-Elem	\$7,590,210,689	3.8%	\$8,097,500,499	6.7%	\$8,636,177,200	6.7%	\$9,068,307,952	5.0%	\$9,618,894,392	6.1%	<b>\$10,244,498,983</b>	6.5%
SCCS-Secondary	\$15,873,694,586	3.7%	\$16,924,701,051	6.6%	\$18,004,849,577	6.4%	\$18,933,863,096	5.2%	\$20,063,075,813	6.0%	<b>\$21,324,256,479</b>	6.3%
PVUSD	\$11,246,171,398	4.1%	\$12,082,984,977	7.4%	\$12,755,482,882	5.6%	\$13,351,344,991	4.7%	\$14,070,366,938	5.4%	<b>\$14,897,775,526</b>	5.9%
TOTALS	\$81,962,827,700	3.8%	\$87,702,693,542	7.0%	\$93,307,450,354	6.4%	\$98,025,960,151	5.1%	\$103,701,961,165	5.8%	<b>\$110,177,141,516</b>	6.2%

**NOTES:**

- Assessed Valuations do not correlate directly to changes in property taxes. AB8 factors influence the calculation of property tax revenues.

Santa Cruz County  
Assessed Valuations by District

District	2013-14	% Change	2014-15	% Change	2015-16	% Change	2016-17	% Change	2017-18	% Change
Bonny Doon	\$501,254,473	3.2%	\$531,471,795	6.0%	\$558,775,140	5.1%	\$581,754,157	4.1%	<b>\$619,175,678</b>	6.4%
Happy Valley	\$239,880,185	2.9%	\$255,243,680	6.4%	\$270,183,708	5.9%	\$280,813,295	3.9%	<b>\$294,849,401</b>	5.0%
Live Oak	\$2,912,637,175	3.9%	\$3,077,204,771	5.7%	\$3,283,520,634	6.7%	\$3,472,566,089	5.8%	<b>\$3,710,926,078</b>	6.9%
Mountain	\$225,887,840	5.9%	\$238,272,171	5.5%	\$248,866,832	4.4%	\$259,631,310	4.3%	<b>\$270,361,786</b>	4.1%
Pacific	<b>\$106,475,100</b>	<b>-0.9%</b>	<b>\$112,925,745</b>	<b>6.1%</b>	<b>\$117,464,217</b>	<b>4.0%</b>	<b>\$129,291,659</b>	<b>10.1%</b>	<b>\$135,742,897</b>	<b>5.0%</b>
Scotts Valley	\$3,192,134,276	3.2%	\$3,399,776,232	6.5%	\$3,626,083,606	6.7%	\$3,828,538,209	5.6%	<b>\$4,066,316,984</b>	6.2%
Soquel	\$4,297,349,123	3.5%	\$4,611,812,391	7.3%	\$4,889,861,846	6.0%	\$5,141,498,635	5.1%	<b>\$5,413,125,581</b>	5.3%
San Lorenzo Valley	\$2,724,036,953	4.2%	\$2,970,495,492	9.0%	\$3,253,358,122	9.5%	\$3,420,574,009	5.1%	<b>\$3,609,623,024</b>	5.5%
SCCOE/CSSF	\$33,053,095,902	3.8%	\$35,400,304,738	7.1%	\$37,662,826,590	6.4%	\$39,557,776,749	5.0%	<b>\$41,829,502,593</b>	5.7%
SCCS-Elem	\$7,590,210,689	3.8%	\$8,097,500,499	6.7%	\$8,636,177,200	6.7%	\$9,068,307,952	5.0%	<b>\$9,618,894,392</b>	6.1%
SCCS-Secondary	\$15,873,694,586	3.7%	\$16,924,701,051	6.6%	\$18,004,849,577	6.4%	\$18,933,863,096	5.2%	<b>\$20,063,075,813</b>	6.0%
PVUSD	\$11,246,171,398	4.1%	\$12,082,984,977	7.4%	\$12,755,482,882	5.6%	\$13,351,344,991	4.7%	<b>\$14,070,366,938</b>	5.4%
<b>TOTALS</b>	<b>\$81,962,827,700</b>	<b>3.8%</b>	<b>\$87,702,693,542</b>	<b>7.0%</b>	<b>\$93,307,450,354</b>	<b>6.4%</b>	<b>\$98,025,960,151</b>	<b>5.1%</b>	<b>\$103,701,961,165</b>	<b>5.8%</b>

**NOTES:**

- Assessed Valuations do not correlate directly to changes in property taxes. AB8 factors influence the calculation of property tax revenues.
- Reports are provided by the County of Santa Cruz, Budget and Tax Manager
- Data is compiled by the Santa Cruz County Office of Education/Business Office/831-466-5604

## Assessed Valuations by District

District	2012-13	% Change	2013-14	% Change	2014-15	% Change	2015-16	% Change	2016-17	% Change
Bonny Doon	\$485,513,792	-0.6%	\$501,254,473	3.2%	\$531,471,795	6.0%	\$558,775,140	5.1%	<b>\$581,754,157</b>	4.1%
Happy Valley	\$233,071,555	-0.8%	\$239,880,185	2.9%	\$255,243,680	6.4%	\$270,183,708	5.9%	<b>\$280,813,295</b>	3.9%
Live Oak	\$2,802,517,781	-1.2%	\$2,912,637,175	3.9%	\$3,077,204,771	5.7%	\$3,283,520,634	6.7%	<b>\$3,472,566,089</b>	5.8%
Mountain	\$213,352,829	-1.5%	\$225,887,840	5.9%	\$238,272,171	5.5%	\$248,866,832	4.4%	<b>\$259,631,310</b>	4.3%
Pacific	\$107,422,719	2.0%	\$106,475,100	-0.9%	\$112,925,745	6.1%	\$117,464,217	4.0%	<b>\$129,291,659</b>	10.1%
Scotts Valley	\$3,091,732,246	-1.8%	\$3,192,134,276	3.2%	\$3,399,776,232	6.5%	\$3,626,083,606	6.7%	<b>\$3,828,538,209</b>	5.6%
Soquel	\$4,153,342,236	-2.5%	\$4,297,349,123	3.5%	\$4,611,812,391	7.3%	\$4,889,861,846	6.0%	<b>\$5,141,498,635</b>	5.1%
San Lorenzo Valley	\$2,614,951,847	-1.9%	\$2,724,036,953	4.2%	\$2,970,495,492	9.0%	\$3,253,358,122	9.5%	<b>\$3,420,574,009</b>	5.1%
SCCOE/CSSF	\$31,828,706,245	-1.2%	\$33,053,095,902	3.8%	\$35,400,304,738	7.1%	\$37,662,826,590	6.4%	<b>\$39,557,776,749</b>	5.0%
SCCS-Elem	\$7,310,656,647	-0.1%	\$7,590,210,689	3.8%	\$8,097,500,499	6.7%	\$8,636,177,200	6.7%	<b>\$9,068,307,952</b>	5.0%
SCCS-Secondary	\$15,305,877,559	-1.0%	\$15,873,694,586	3.7%	\$16,924,701,051	6.6%	\$18,004,849,577	6.4%	<b>\$18,933,863,096</b>	5.2%
PVUSD	\$10,799,687,718	-1.1%	\$11,246,171,398	4.1%	\$12,082,984,977	7.4%	\$12,755,482,882	5.6%	<b>\$13,351,344,991</b>	4.7%
<b>TOTALS</b>	<b>\$78,946,833,174</b>	<b>-1.1%</b>	<b>\$81,962,827,700</b>	<b>3.8%</b>	<b>\$87,702,693,542</b>	<b>7.0%</b>	<b>\$93,307,450,354</b>	<b>6.4%</b>	<b>\$98,025,960,151</b>	<b>5.1%</b>

### **NOTE:**

- Assessed Valuations do not correlate directly to changes in property taxes. AB8 factors influence the calculation of property tax revenues.

Santa Cruz County  
Assessed Valuations by District

District	2010-11	% Change	2011-12	% Change	2012-13	% Change	2013-14	% Change	2014-15	% Change
Bonny Doon	\$484,189,415	-0.3%	\$488,270,709	0.8%	\$485,513,792	-0.6%	\$501,254,473	3.2%	\$531,471,795	6.0%
Happy Valley	\$236,575,290	-1.2%	\$234,895,310	-0.7%	\$233,071,555	-0.8%	\$239,880,185	2.9%	\$255,243,680	6.4%
Live Oak	\$2,832,440,237	0.2%	\$2,835,308,094	0.1%	\$2,802,517,781	-1.2%	\$2,912,637,175	3.9%	\$3,077,204,771	5.7%
Mountain	\$213,046,958	0.5%	\$216,588,779	1.7%	\$213,352,829	-1.5%	\$225,887,840	5.9%	\$238,272,171	5.5%
Pacific	\$106,629,693	-24.2%	\$105,319,911	-1.2%	\$107,422,719	2.0%	\$106,475,100	-0.9%	\$112,925,745	6.1%
Scotts Valley	\$3,178,798,786	-1.1%	\$3,147,590,480	-1.0%	\$3,091,732,246	-1.8%	\$3,192,134,276	3.2%	\$3,399,776,232	6.5%
Soquel	\$4,157,509,574	0.3%	\$4,261,239,026	2.5%	\$4,153,342,236	-2.5%	\$4,297,349,123	3.5%	\$4,611,812,391	7.3%
San Lorenzo Valley	\$2,812,984,037	-3.1%	\$2,665,519,011	-5.2%	\$2,614,951,847	-1.9%	\$2,724,036,953	4.2%	\$2,970,495,492	9.0%
SCCOE	\$32,216,038,673	-0.6%	\$32,207,201,297	0.0%	\$31,828,706,245	-1.2%	\$33,053,095,902	3.8%	\$35,400,304,738	7.1%
SCCS-Elem	\$7,280,318,138	0.7%	\$7,317,264,020	0.5%	\$7,310,656,647	-0.1%	\$7,590,210,689	3.8%	\$8,097,500,499	6.7%
SCCS-Secondary	\$15,310,709,305	0.2%	\$15,458,885,849	1.0%	\$15,305,877,559	-1.0%	\$15,873,694,586	3.7%	\$16,924,701,051	6.6%
PVUSD	\$10,900,901,378	-1.0%	\$10,919,040,137	0.2%	\$10,799,687,718	-1.1%	\$11,246,171,398	4.1%	\$12,082,984,977	7.4%
TOTALS	\$79,730,141,484	-0.5%	\$79,857,122,623	0.2%	\$78,946,833,174	-1.1%	\$81,962,827,700	3.8%	\$87,702,693,542	7.0%

**NOTE:**

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Santa Cruz County  
Assessed Valuations by District

District	2009-10	2010-11	% Change	2011-12	% Change	2012-13	% Change	2013-14	% Change	2014-15	% Change
Bonny Doon	\$485,439,802	\$484,189,415	-0.3%	\$488,270,709	0.8%	\$485,513,792	-0.6%	\$501,254,473	3.2%	<b>\$531,471,795</b>	6.0%
Happy Valley	\$239,553,185	\$236,575,290	-1.2%	\$234,895,310	-0.7%	\$233,071,555	-0.8%	\$239,880,185	2.9%	<b>\$255,243,680</b>	6.4%
Live Oak	\$2,825,495,923	\$2,832,440,237	0.2%	\$2,835,308,094	0.1%	\$2,802,517,781	-1.2%	\$2,912,637,175	3.9%	<b>\$3,077,204,771</b>	5.7%
Mountain	\$212,013,081	\$213,046,958	0.5%	\$216,588,779	1.7%	\$213,352,829	-1.5%	\$225,887,840	5.9%	<b>\$238,272,171</b>	5.5%
Pacific	\$140,661,218	\$106,629,693	-24.2%	\$105,319,911	-1.2%	\$107,422,719	2.0%	\$106,475,100	-0.9%	<b>\$112,925,745</b>	6.1%
Scotts Valley	\$3,213,555,660	\$3,178,798,786	-1.1%	\$3,147,590,480	-1.0%	\$3,091,732,246	-1.8%	\$3,192,134,276	3.2%	<b>\$3,399,776,232</b>	6.5%
Soquel	\$4,145,820,513	\$4,157,509,574	0.3%	\$4,261,239,026	2.5%	\$4,153,342,236	-2.5%	\$4,297,349,123	3.5%	<b>\$4,611,812,391</b>	7.3%
San Lorenzo Valley	\$2,902,800,580	\$2,812,984,037	-3.1%	\$2,665,519,011	-5.2%	\$2,614,951,847	-1.9%	\$2,724,036,953	4.2%	<b>\$2,970,495,492</b>	9.0%
SCCOE	\$32,415,517,965	\$32,216,038,673	-0.6%	\$32,207,201,297	0.0%	\$31,828,706,245	-1.2%	\$33,053,095,902	3.8%	<b>\$35,400,304,738</b>	7.1%
SCCS-Elem	\$7,228,617,798	\$7,280,318,138	0.7%	\$7,317,264,020	0.5%	\$7,310,656,647	-0.1%	\$7,590,210,689	3.8%	<b>\$8,097,500,499</b>	6.7%
SCCS-Secondary	\$15,277,600,520	\$15,310,709,305	0.2%	\$15,458,885,849	1.0%	\$15,305,877,559	-1.0%	\$15,873,694,586	3.7%	<b>\$16,924,701,051</b>	6.6%
PVUSD	\$11,009,065,629	\$10,900,901,378	-1.0%	\$10,919,040,137	0.2%	\$10,799,687,718	-1.1%	\$11,246,171,398	4.1%	<b>\$12,082,984,977</b>	7.4%
<b>TOTALS</b>	<b>\$80,096,141,874</b>	<b>\$79,730,141,484</b>	<b>-0.5%</b>	<b>\$79,857,122,623</b>	<b>0.2%</b>	<b>\$78,946,833,174</b>	<b>-1.1%</b>	<b>\$81,962,827,700</b>	<b>3.8%</b>	<b>\$87,702,693,542</b>	<b>7.0%</b>

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Santa Cruz County  
Assessed Valuations by District

District	2008-09	2009-10	% Change	2010-11	% Change	2011-12	% Change	2012-13	% Change	2013-14	% Change
Bonny Doon	\$496,549,521	\$485,439,802	-2.2%	\$484,189,415	-0.3%	\$488,270,709	0.8%	\$485,513,792	-0.6%	<b>\$501,254,473</b>	3.2%
Happy Valley	\$247,771,866	\$239,553,185	-3.3%	\$236,575,290	-1.2%	\$234,895,310	-0.7%	\$233,071,555	-0.8%	<b>\$239,880,185</b>	2.9%
Live Oak	\$2,875,675,309	\$2,825,495,923	-1.7%	\$2,832,440,237	0.2%	\$2,835,308,094	0.1%	\$2,802,517,781	-1.2%	<b>\$2,912,637,175</b>	3.9%
Mountain	\$215,689,544	\$212,013,081	-1.7%	\$213,046,958	0.5%	\$216,588,779	1.7%	\$213,352,829	-1.5%	<b>\$225,887,840</b>	5.9%
Pacific	\$152,759,720	\$140,661,218	-7.9%	\$106,629,693	-24.2%	\$105,319,911	-1.2%	\$107,422,719	2.0%	<b>\$106,475,100</b>	-0.9%
Scotts Valley	\$3,301,582,612	\$3,213,555,660	-2.7%	\$3,178,798,786	-1.1%	\$3,147,590,480	-1.0%	\$3,091,732,246	-1.8%	<b>\$3,192,134,276</b>	3.2%
Soquel	\$4,521,262,333	\$4,145,820,513	-8.3%	\$4,157,509,574	0.3%	\$4,261,239,026	2.5%	\$4,153,342,236	-2.5%	<b>\$4,297,349,123</b>	3.5%
San Lorenzo Valley	\$3,020,472,989	\$2,902,800,580	-3.9%	\$2,812,984,037	-3.1%	\$2,665,519,011	-5.2%	\$2,614,951,847	-1.9%	<b>\$2,724,036,953</b>	4.2%
SCCOE	\$33,444,486,335	\$32,415,517,965	-3.1%	\$32,216,038,673	-0.6%	\$32,207,201,297	0.0%	\$31,828,706,245	-1.2%	<b>\$33,053,095,902</b>	3.8%
SCCS-Elem	\$7,253,254,377	\$7,228,617,798	-0.3%	\$7,280,318,138	0.7%	\$7,317,264,020	0.5%	\$7,310,656,647	-0.1%	<b>\$7,590,210,689</b>	3.8%
SCCS-Secondary	\$15,429,699,500	\$15,277,600,520	-1.0%	\$15,310,709,305	0.2%	\$15,458,885,849	1.0%	\$15,305,877,559	-1.0%	<b>\$15,873,694,586</b>	3.7%
PVUSD	\$11,679,958,152	\$11,009,065,629	-5.7%	\$10,900,901,378	-1.0%	\$10,919,040,137	0.2%	\$10,799,687,718	-1.1%	<b>\$11,246,171,398</b>	4.1%
<b>TOTALS</b>	<b>\$82,639,162,258</b>	<b>\$80,096,141,874</b>	<b>-3.1%</b>	<b>\$79,730,141,484</b>	<b>-0.5%</b>	<b>\$79,857,122,623</b>	<b>0.2%</b>	<b>\$78,946,833,174</b>	<b>-1.1%</b>	<b>\$81,962,827,700</b>	<b>3.8%</b>

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Santa Cruz County  
Assessed Valuations by District

District	2008-09	2009-10	Difference	2010-11	Difference	2011-12	Difference	2012-13	Difference
Bonny Doon	\$496,549,521	\$485,439,802	-2.24%	\$484,189,415	-0.26%	\$488,270,709	0.84%	<b>\$485,513,792</b>	-0.56%
Happy Valley	\$247,771,866	\$239,553,185	-3.32%	\$236,575,290	-1.24%	\$234,895,310	-0.71%	<b>\$233,071,555</b>	-0.78%
Live Oak	\$2,875,675,309	\$2,825,495,923	-1.74%	\$2,832,440,237	0.25%	\$2,835,308,094	0.10%	<b>\$2,802,517,781</b>	-1.16%
Mountain	\$215,689,544	\$212,013,081	-1.70%	\$213,046,958	0.49%	\$216,588,779	1.66%	<b>\$213,352,829</b>	-1.49%
Pacific	\$152,759,720	\$140,661,218	-7.92%	\$106,629,693	-24.19%	\$105,319,911	-1.23%	<b>\$107,422,719</b>	2.00%
Scotts Valley	\$3,301,582,612	\$3,213,555,660	-2.67%	\$3,178,798,786	-1.08%	\$3,147,590,480	-0.98%	<b>\$3,091,732,246</b>	-1.77%
Soquel	\$4,521,262,333	\$4,145,820,513	-8.30%	\$4,157,509,574	0.28%	\$4,261,239,026	2.49%	<b>\$4,153,342,236</b>	-2.53%
San Lorenzo Valley	\$3,020,472,989	\$2,902,800,580	-3.90%	\$2,812,984,037	-3.09%	\$2,665,519,011	-5.24%	<b>\$2,614,951,847</b>	-1.90%
SCCOE	\$33,444,486,335	\$32,415,517,965	-3.08%	\$32,216,038,673	-0.62%	\$32,207,201,297	-0.03%	<b>\$31,828,706,245</b>	-1.18%
SCCS-Elem	\$7,253,254,377	\$7,228,617,798	-0.34%	\$7,280,318,138	0.72%	\$7,317,264,020	0.51%	<b>\$7,310,656,647</b>	-0.09%
SCCS-Secondary	\$15,429,699,500	\$15,277,600,520	-0.99%	\$15,310,709,305	0.22%	\$15,458,885,849	0.97%	<b>\$15,305,877,559</b>	-0.99%
PVUSD	\$11,679,958,152	\$11,009,065,629	-5.74%	\$10,900,901,378	-0.98%	\$10,919,040,137	0.17%	<b>\$10,799,687,718</b>	-1.09%
<b>TOTALS</b>	<b>\$82,639,162,258</b>	<b>\$80,096,141,874</b>	<b>-3.08%</b>	<b>\$79,730,141,484</b>	<b>-0.46%</b>	<b>\$79,857,122,623</b>	<b>0.16%</b>	<b>\$78,946,833,174</b>	<b>-1.14%</b>

NOTES:

- 1) Assessed Valuations do not directly correlate to changes in property taxes.  
AB8 factors influence the calculation of property taxes.

Santa Cruz County  
Assessed Valuations by District

District	2008-09	2009-10	Difference	2010-11	Difference	2011-12	Difference
Bonny Doon	\$496,549,521	\$485,439,802	-2.24%	\$484,189,415	-0.26%	<b>\$488,270,709</b>	0.84%
Happy Valley	\$247,771,866	\$239,553,185	-3.32%	\$236,575,290	-1.24%	<b>\$234,895,310</b>	-0.71%
Live Oak	\$2,875,675,309	\$2,825,495,923	-1.74%	\$2,832,440,237	0.25%	<b>\$2,835,308,094</b>	0.10%
Mountain	\$215,689,544	\$212,013,081	-1.70%	\$213,046,958	0.49%	<b>\$216,588,779</b>	1.66%
Pacific	\$152,759,720	\$140,661,218	-7.92%	\$106,629,693	-24.19%	<b>\$105,319,911</b>	-1.23%
Scotts Valley	\$3,301,582,612	\$3,213,555,660	-2.67%	\$3,178,798,786	-1.08%	<b>\$3,147,590,480</b>	-0.98%
Soquel	\$4,521,262,333	\$4,145,820,513	-8.30%	\$4,157,509,574	0.28%	<b>\$4,261,239,026</b>	2.49%
San Lorenzo Valley	\$3,020,472,989	\$2,902,800,580	-3.90%	\$2,812,984,037	-3.09%	<b>\$2,665,519,011</b>	-5.24%
SCCOE	\$33,444,486,335	\$32,415,517,965	-3.08%	\$32,216,038,673	-0.62%	<b>\$32,207,201,297</b>	-0.03%
SCCS-Elem	\$7,253,254,377	\$7,228,617,798	-0.34%	\$7,280,318,138	0.72%	<b>\$7,317,264,020</b>	0.51%
SCCS-Secondary	\$15,429,699,500	\$15,277,600,520	-0.99%	\$15,310,709,305	0.22%	<b>\$15,458,885,849</b>	0.97%
PVUSD	\$11,679,958,152	\$11,009,065,629	-5.74%	\$10,900,901,378	-0.98%	<b>\$10,919,040,137</b>	0.17%
<b>TOTALS</b>	<b>\$82,639,162,258</b>	<b>\$80,096,141,874</b>	<b>-3.08%</b>	<b>\$79,730,141,484</b>	<b>-0.46%</b>	<b>\$79,857,122,623</b>	<b>0.16%</b>

NOTES:

- 1) Assessed Valuations do not directly correlate to changes in property taxes.  
AB8 factors influence the calculation of property taxes.



Santa Cruz County  
Assessed Valuations by District

District	2008-09	2009-10	Difference	2010-11	Difference
Bonny Doon	\$496,549,521	\$485,439,802	-2.24%	\$484,189,415	-0.26%
Happy Valley	\$247,771,866	\$239,553,185	-3.32%	\$236,575,290	-1.24%
Live Oak	\$2,875,675,309	\$2,825,495,923	-1.74%	\$2,832,440,237	0.25%
Mountain	\$215,689,544	\$212,013,081	-1.70%	\$213,046,958	0.49%
Pacific	\$152,759,720	\$140,661,218	-7.92%	\$106,629,693	-24.19%
Scotts Valley	\$3,301,582,612	\$3,213,555,660	-2.67%	\$3,178,798,786	-1.08%
Soquel	\$4,521,262,333	\$4,145,820,513	-8.30%	\$4,157,509,574	0.28%
San Lorenzo Valley	\$3,020,472,989	\$2,902,800,580	-3.90%	\$2,812,984,037	-3.09%
SCCOE	\$33,444,486,335	\$32,415,517,965	-3.08%	\$32,216,038,673	-0.62%
SCCS-Elem	\$7,253,254,377	\$7,228,617,798	-0.34%	\$7,280,318,138	0.72%
SCCS-Secondary	\$15,429,699,500	\$15,277,600,520	-0.99%	\$15,310,709,305	0.22%
PVUSD	\$11,679,958,152	\$11,009,065,629	-5.74%	\$10,900,901,378	-0.98%
TOTALS	\$82,639,162,258	\$80,096,141,874	-3.08%	\$79,730,141,484	-0.46%

NOTES:

- 1) Assessed Valuations do not directly correlate to changes in property taxes.  
AB8 factors influence the calculation of property taxes.
- 2) The County expects to have property tax estimates by district by the end of August and the COE will send out those projections to the districts once they are received.
- 3) The large decline in valuation for Pacific Elementary is due to the closure of the Cemex cement plant.

District	2010-11
Bonny Doon	\$484,189,415
Happy Valley	\$236,575,290
Live Oak	\$2,832,440,237
Mountain	\$213,046,958
Pacific	\$106,629,693
Soquel	\$4,157,509,574
SCCS-Elem	\$7,280,318,138

TOTAL	\$15,310,709,305
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SCCS-Secondary	\$15,310,709,305
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District	2010-11
Scotts Valley	\$3,178,798,786
San Lorenzo Valley	\$2,812,984,037
SCCS-Secondary	\$15,310,709,305
PVUSD	\$10,900,901,378

	\$32,203,393,506
COE	\$32,216,038,673

DIFF	\$12,645,167
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Santa Cruz County  
Assessed Valuations by District

District	2008-09	2009-10	Difference
Bonny Doon	\$496,549,521	\$485,439,802	-2.24%
Happy Valley	\$247,771,866	\$239,553,185	-3.32%
Live Oak	\$2,875,675,309	\$2,825,495,923	-1.74%
Mountain	\$215,689,544	\$212,013,081	-1.70%
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NOTES:

- 1) Assessed Valuations do not directly correlate to changes in property taxes.  
AB8 factors influence the calculation of property taxes.
- 2) The County expects to have property tax estimates by district by the end of August and the COE will send out those projections to the districts once they are received.



# *Pacific Elementary School*

www.pacificesd.org  
50 Ocean Street/P.O. Box H  
Davenport, CA 95017  
831-425-7002

## **Pacific Elementary School District**

Board of Trustees Meeting  
**Tuesday, October 16<sup>th</sup>, 2018 @ 4:00 PM**  
Pacific Elementary School, Davenport, CA

### **Pacific School Mission Statement**

Pacific School's mission is to prepare children for life through experiential learning that addresses the needs of the whole child. We create a safe and secure school environment that promotes social and academic growth and develops an enthusiasm for learning, a positive self-image, and cross-cultural understanding.

All persons are encouraged to attend and, where appropriate, to participate in, meetings of the Pacific School Board of Trustees. Persons wishing to address the Board are asked to state their names for the record. Consideration of all matters is conducted in open session except for those relating to litigation, personnel, and employee negotiations, which, by law, may be considered in executive (closed) session.

Meeting facilities are accessible to persons with disabilities. By request, alternative agenda document formats are available to persons with disabilities. To arrange an alternative agenda document format or to arrange aid or services to modify or accommodate persons with a disability to participate in a public meeting, please provide a written request to: Eric Gross, Superintendent/Principal at the Pacific School District Office at least three working days prior to any public meeting.

### **Board Meeting Minutes**

#### **1. OPENING PROCEDURES FOR OPEN SESSION**

- 1.1. Call to Order – 4:00 p.m.
- 1.2. Roll Call & Establishment of Quorum
  - 1.2.1. Gwyan Rhabyt, Board President - Present
  - 1.2.2. Don Croll, Board Trustee – Arrived 4:06 p.m.
  - 1.2.3. Cari Napoles, Board Trustee - Present
- 1.3. Approval of the agenda for October 16<sup>th</sup>, 2018
  - 1.3.1. Agenda deletions, additions, or changes of sequence

Approved with no changes. Ms. Napoles moved, Mr. Rhabyt seconded. 2 in favor, 0 opposed, 0 abstentions, 1 absence.

#### **2. PUBLIC COMMENTS**

- 2.1. For items not on the agenda, this is an opportunity for the public to address the board directly related to school business. The Board President may allot time to those wishing to speak, but no action will be taken on matters presented (EC §35145.5).
- 2.2. For items on the agenda, the public will have the opportunity to speak at the time the agenda item is discussed. Please address the Board President.

An email from Caitlin Phillips was received and reviewed by the board. Ms. Napoles provided background information around the fundraising associated with FoodLab and Farm-to-Table. Mr. Croll spoke about the importance of appreciating and supporting our volunteer community.

### 3. **REPORTS**

#### 3.1. Superintendent Report

- Representatives from CalPoly and Pacific School met to discuss changes to make for future Farm-to-Table events. There are possibilities that CalPoly might provide student interns in FoodLab in the future.
- Transition from Digital Schools to Escape will require huge effort, mostly from the District Office Manager, Elizabeth Andrews.
- CA Connections Academy Charter will be visiting Pacific School.
- TIDES Non Public School closing next month = reduced SELPA costs
- Donors: \$50,000 (principal's discretion); \$1,000 for scholarships for after-school programs. The donors have pledged \$50,000 each year for 5 additional years for teacher empowerment. For this year about \$25,000 will be spent on FOSS science curriculum. Mr. Gross is working with other districts in the county to place a bulk order at a discount. The donation honors Stephanie and Chris Raugust. Mr. Croll urged Mr. Gross to do some strategic planning.

#### 3.2. Board Member Reports

- Ms. Napoles is still working on Mr. Gross' evaluation.
- Mr. Croll is working with Ms. Amity Sandage and a program which involves current teachers and student teachers to develop field-based curriculum. The program is starting with secondary education but will be expanding to elementary.

#### 3.3. School Site Council Report

- Met 9/20/18. Elected officers. Reviewed tasks & expectations for year.

#### 3.4. Parents Club Report

- Met 10/9. New secretary & treasurer. Drive for Schools, Potato Night. Approved \$5,000 for Mr. John Fisher's sprinkler & drain projects to hire Barkley's crew to do the work as needed. Approved \$2,000 for Ms. Monica Hettenhausen's Gold Dust or Bust play to hire Ms. Valerie Cameron. Approved \$1,000 for new library database. Still searching for a president for next year.

### 4. **CONSENT AGENDA:** These matters may be passed by one roll call motion. Board Members may remove items from the agenda for a separate discussion and vote.

- 4.1. Approval of the minutes from the Board meeting on 9/18/18

4.2. Approve Warrant Lists

4.3. Approval of LCAP and Budget by Santa Cruz County Office of Education

4.4. Approve Continuing Funding Application for Preschool

Approved with no changes. Ms. Napoles moved, Mr. Rhabyt seconded. 3 in favor, 0 opposed, 0 abstentions, 0 absences.

## 5. PUBLIC HEARINGS **None**

## 6. BOARD RESOLUTIONS

6.1. Resolution # 2019-4 **Preschool Contract**

Approved with no changes. Ms. Napoles moved, Mr. Rhabyt seconded. 3 in favor, 0 opposed, 0 abstentions, 0 absences.

## 7. ITEMS TO BE TRANSACTED AND/OR DISCUSSED

7.1. Staff report on Immunization data. The Board reviewed the immunization data.

7.2. Approval of MOU to replace Digital Schools with Escape

Approved with no changes. Ms. Napoles moved, Mr. Rhabyt seconded. 3 in favor, 0 opposed, 0 abstentions, 0 absences.

7.3. **Superintendent's Goals** for 2018-19

The Board suggested some minor changes to the Superintendent's goals.

7.4. Approve Calendar Change: move Professional Development Day from 3/22/19 to 3/15/19

The Board decided to hire substitutes so that teachers could go to the professional development day on 3/15/19 without changing the professional development day date. Ms. Napoles moved, Mr. Rhabyt seconded. 3 in favor, 0 opposed, 0 abstentions, 0 absences.

7.5. Board Meeting Schedule

### ▪ Existing Meetings

- 8/21/18
- 9/18/18
- 10/16/18
- 11/20/18
- 12/18/18
- 1/15/19
- 2/19/19
- 3/19/19
- 4/16/19
- 5/21/19
- 6/18/19

### ▪ Need to add second meetings in May & June for budget & LCAP approvals

- 5/28/18
- 6/25/18

5/28/18 and 6/25/18 added. Ms. Napoles moved, Mr. Rhabyt seconded. 3 in favor, 0 opposed, 0 abstentions, 0 absences.

**8. CLOSED SESSION**

- 8.1. Public Employee Discipline/Dismissal/Release (Section 54957.6)
- 8.2. Public Employee Appointment (Section 54957)

**9. REPORT OF ACTIONS TAKEN IN CLOSED SESSION**

The Board accepted the resignation of LaNette Maioriello and the hire of Sunny Alvarez.

**10. NEXT REGULAR BOARD MEETING: 4:00PM November 20<sup>th</sup>, 2018**

**11. ADJOURNMENT**

If requested, this agenda shall be made available in appropriate alternative formats to persons with a disability, as required by section 202 of the Americans with Disabilities Act (42 U.S.C. section 12132) and the federal rules and regulations implementing the Act. Individuals requesting a disability-related modification or accommodation may contact the District Office.

The board book for this meeting, including this agenda and any back-up materials, may be viewed or downloaded online: <http://www.pacificesd.org/governance.html> or may be viewed at the school: 50 Ocean St. Davenport CA 95017.

**Translation Requests:** Spanish language translation is available on an as-needed basis.

***Solicitudes de Traducción:*** *Traducciones del inglés al español y del español al inglés están disponibles en las sesiones de la mesa directiva.*



# *Pacific Elementary School*

www.pacificesd.org  
50 Ocean Street/P.O. Box H  
Davenport, CA 95017  
831-425-7002

## **Pacific Elementary School District**

Board of Trustees Special Meeting  
**Tuesday, November 6<sup>th</sup>, 2018 @ 4:00 PM**  
Pacific Elementary School, Davenport, CA

### **Pacific School Mission Statement**

Pacific School's mission is to prepare children for life through experiential learning that addresses the needs of the whole child. We create a safe and secure school environment that promotes social and academic growth and develops an enthusiasm for learning, a positive self-image, and cross-cultural understanding.

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### **Board Meeting Minutes**

#### **1. OPENING PROCEDURES FOR OPEN SESSION**

- 1.1. Call to Order
- 1.2. Roll Call & Establishment of Quorum
  - 1.2.1. Gwyann Rhabyt, Board President
  - 1.2.2. Don Croll, Board Trustee
  - 1.2.3. Cari Napoles, Board Trustee

*All present, Mr. Rhabyt in person and Mr. Croll & Ms. Napoles via phone*

- 1.3. Approval of the agenda for November 6<sup>th</sup>, 2018
  - 1.3.1. Agenda deletions, additions, or changes of sequence

*Mr. Croll moved approval and Mr. Rhabyt seconded the motion to approve with the following changes:*

- *The Title changed to Board of Trustees Special Meeting*



- *Remove Reports section*

*Motion passed unanimously*

## **2. PUBLIC COMMENTS**

2.1. For items not on the agenda, this is an opportunity for the public to address the board directly related to school business. The Board President may allot time to those wishing to speak, but no action will be taken on matters presented (EC §35145.5).

2.2. For items on the agenda, the public will have the opportunity to speak at the time the agenda item is discussed. Please address the Board President.

*Alicia DeRollo, a student in the administrative credential program at CSUMB, introduced herself. She will be shadowing Mr. Gross at Pacific Elementary as part of her fieldwork requirement for the program.*

## **3. REPORTS**

*This section was removed from the agenda*

4. **CONSENT AGENDA:** These matters may be passed by one roll call motion. Board Members may remove items from the agenda for a separate discussion and vote.

*Mr. Croll moved approval and Mr. Rhabyt seconded the motion to approve. Motion was passed 2 to 0, with Ms. Napoles abstaining.*

## **5. ITEMS TO BE TRANSACTED AND/OR DISCUSSED**

5.1. Staff report on LEA Local Indicators for the Local Control & Accountability Plan

*Mr. Croll moved approval of the LEA Local Indicators report and Mr. Rhabyt seconded the motion to approve. Motion was passed 2 to 0, with Ms. Napoles abstaining.*

## **6. CLOSED SESSION**

## **7. REPORT OF ACTIONS TAKEN IN CLOSED SESSION**

8. **NEXT REGULAR BOARD MEETING:** 4:00PM November 20<sup>th</sup>, 2018

## **9. ADJOURNMENT**

*Mr. Croll moved to adjourn at 4:25 and Mr. Rhabyt seconded the motion. Motion was passed 2 to 0, with Ms. Napoles abstaining.*

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# **CALIFORNIA CONNECTIONS ACADEMY**

## **CALIFORNIA CONNECTIONS ACADEMY MONTEREY COAST CHARTER PETITION**

Submitted to

**PACIFIC ELEMENTARY SCHOOL DISTRICT**

November 2018

Dr. Richard Savage, Executive Director  
California Connections Academy Schools  
[rsavage@calca.connectionsacademy.org](mailto:rsavage@calca.connectionsacademy.org)

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## THE 15+ ELEMENTS OF A CHARTER PETITION

Education Code section 47605 requires petitioners to provide a “reasonably comprehensive description” of the 15+ elements outlined in the Education Code Section 47605(a)(B)(6). These and other requirements are listed in Figure 1.

**Figure 1. 15+ Elements of a Charter Petition**

15 Elements Outlined in the Education Code	Location in the Charter Petition
1. The educational program of the charter school, designed, among other things, to identify those whom the charter school is attempting to educate, what it means to be an “educated person” in the 21st century, and how learning best occurs. The goals identified in that program shall include the objective of enabling pupils to become self-motivated, competent, and lifelong learners.	Section II, especially II.B, II.C, and II.E
2. The measurable pupil outcomes identified for use by the school.	Section III – III.A – III.D
3. The method by which pupil progress in meeting those pupil outcomes is to be measured.	Section III.D
4. The school’s governance structure, including parental involvement.	Section IV
5. The qualifications to be met by individuals employed by the school.	Section V.A
6. Procedures to ensure health and safety of pupils and staff.	Section V.D
7. The means by which the school will achieve racial and ethnic balance among its pupils, reflective of the general population residing in the district.	Section VI.B
8. Admissions requirements, if applicable.	Section VI.A
9. The manner in which annual financial audits will be conducted, and the manner in which audit exceptions and deficiencies will be resolved.	Section VII.G
10. The procedures by which pupils may be suspended or expelled.	Section V.D
11. Provisions for employee coverage under the State Teachers Retirement System, the Public Employees Retirement System, or federal social security.	Section V.B
12. The public school alternatives for pupils residing within the district who choose not to attend charter schools.	Section VI.C
13. A description of the rights of any employee of the school district upon leaving the employment of the school district to work in a charter school, and of any rights of return to the school district after employment at a charter school.	Section V.C
14. Dispute resolution process.	Section V.E
15. The procedures to be used if a charter school closes.	Section VII.H
<b>Additional Required Information</b>	
1. Budget and cash flow projections, including start-up costs, three-year operational budget and three years of cash flow statements	Section VII.A
2. Description of founding team	Section I.A
3. Facilities plan	Section VIII.A
4. Potential impact on the authorizer	Section IX
5. A declaration whether or not the charter school will be the exclusive public school employer of the charter school employees.	Section V.C., X.

## EXECUTIVE SUMMARY

California Connections Academy Monterey Coast (abbreviated herein as “CalCA Monterey Coast”) will represent an outstanding virtual K–12 educational choice for families in the counties of Santa Cruz, San Mateo, San Benito, Santa Clara and Monterey, and will build awareness of Pacific Elementary School District’s (abbreviated herein as “PES”) innovative approach to learning.

California Connections Academy Schools “serve highly mobile students with complex needs known to impact academic performance. These characteristics create a unique student population that differs from traditional brick and mortar schools.”<sup>1</sup>

One of the most significant benefits the school will bring to PES is being able to serve students who are underserved or not being served within the larger community. Students who are athletes, medically homebound, bullied, homeschooled, have special needs, or simply require a flexible schedule will seek out CalCA Monterey Coast. Students benefit from instruction that is individualized, personalized, and flexible.

CalCA Monterey Coast will set a new standard for virtual K–12 education excellence in California. Students will benefit from a top-quality curriculum that meets all California Common Core State Standards. Each student will have a Personalized Learning Plan and one or more fully qualified California-certified teachers working with expert curriculum specialists to tailor the curriculum to meet that student’s individual learning needs.

More than an online school, CalCA Monterey Coast will be a virtual learning community that connects students, teachers, and families through unique technology tools as well as synchronous and one-on-one interaction. Students and their families can count on sophisticated support for their curriculum, technology, special education, and digital learning platform needs, so that they can focus on academic progress and achievement. Consistent with applicable law, as a virtual school, CalCA Monterey Coast will serve students in grades K–12 from the county of Santa Cruz as well as in San Mateo, San Benito, Santa Clara, and Monterey counties. CalCA Monterey Coast will provide and expand opportunities to underserved students.

CalCA Monterey Coast will be tailor-made for a diverse array of students who benefit from a quality alternative to the traditional brick-and-mortar classroom.

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<sup>1</sup> <https://www.pearson.com/content/dam/one-dot-com/one-dot-com/global/Files/efficacy-and-research/reports/audited/Connections-Academy-research-report.pdf>

These include: Students whose families seek more involvement in their child's education;

- Students who are medically homebound due to illness or disability;
- Exceptional students who are far ahead of or far behind their peers in school;
- Students pursuing artistic or athletic interests;
- Students who require a flexible school schedule;
- Students in group homes or institutions;
- Students who have been bullied; and
- Students at risk of academic failure, who may particularly benefit from intensive, personalized instruction.

CalCA Monterey Coast plans to engage Connections Education LLC (referred to herein as Connections), a leading online educational service provider for curriculum, technology, and school support services to charter schools.

There are currently five other California Connections Academy (CalCA)<sup>2</sup> virtual public schools in the charter network referred to as California Connections Academy Schools:

- California Connections Academy Southern California (CalCA SoCal – formerly known as Capistrano Connections Academy) opened with sponsorship by Capistrano Unified School District in 2004 and serves more than 5,000 students in Southern California.
- California Connections Academy Central (CalCA Central) opened under a charter authorized by Alpaugh Unified School District in 2006 and serves approximately 450 students in the lower Central Valley.
- California Connections Academy Ripon (CalCA Ripon) opened under a charter authorized by Ripon Unified School District in 2012 and serves approximately 1,150 students in the upper Central Valley and Northern California regions including Sacramento and the East Bay.
- California Connections Academy North Bay (CalCA North Bay) opened under a charter authorized by Middletown Unified School District in 2014 and serves approximately 175 students in the North Bay region of Northern California.

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<sup>2</sup> Each school operated by California Online Public Schools (CalOPS), a California public benefit corporation, will be updating its name to reflect a change to a unified name convention. The existing California Connections Academy @ Central, the existing California Connections Academy @ Ripon and the existing California Connections Academy @ North Bay will be updated to remove the @ symbol from their names as well as to best reflect the regional areas served. Similarly, existing Capistrano California Connections Academy will be updated to conform to this naming convention as California Connections Academy Southern California.

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- California Connections Academy Central Coast (CalCA Central Coast) will open under a charter authorized by Cuyama Joint Unified School District in SY 2019-2020 and will serve approximately 200 students in the Central Coast region of southern California.

The CalCA schools use the Connections curriculum and instructional program that has proven successful in communities across California as well as in other states, and was the first program of its kind to be nationally certified by AdvancED. The Connections program is accredited by AdvancED<sup>3</sup>.

Connections' developmentally appropriate curriculum increases its integration of technology as students advance through the grades. Each Connections course includes active learning elements (including online and/or offline activities) that address diverse learning styles and preferences, including textual, visual, auditory, and/or hands-on. Connections courses offer a wide range of resources supporting course content and different learning abilities. The courses include a variety of instructional resources, including over 1,800 Teachlet® tutorials, proprietary interactive learning experiences, and more than 1,000 primary source and instructional videos. Integrated iText electronic textbooks are licensed from a variety of leading publishers including Prentice Hall, McGraw Hill, Pearson, and others, while non-proprietary technology-based content is licensed from "best-of-breed" providers such as BrainPOP® videos, Grolier Online™, and Study Island. The instructional design includes interactive LiveLesson™ sessions and threaded discussions.

The curriculum is updated regularly, with revisions and improvements communicated to the CalCA Monterey Coast's Governing Board<sup>4</sup>, based on a rigorous analysis of student performance on state standards as measured by state testing results and internal assessments. Connexus will facilitate the effective delivery of the curriculum via an optimal combination of technology and print media. Staff and volunteers will facilitate enriching in-person community activities to round out the comprehensive learning experience.

The ultimate focus of this "high-tech, high-interaction" instructional model will be student achievement. Students will master the core subjects of reading/language arts, mathematics, science, and social studies through a challenging curriculum that meets California Common Core State Standards (including the Common Core State Standards) and will be prepared to perform well on the state assessments. High school core courses and many elective courses are also University of California "a-g" and NCAA approved.

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<sup>3</sup> Accreditation agency serving 32,000 public and private schools and districts <http://www.advanc-ed.org/>

<sup>4</sup> In this document, use of the term "Board" or "Governing Board" refers to California Online Public Schools, the Governing Board for the nonprofit public benefit corporation that operates CalCA Monterey Coast, unless otherwise specifically indicated as the PES Board (the Pacific Elementary School District' Board).

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The highly trained and experienced teachers are integral to student and school success. Fully qualified, California-credentialed teachers will be a key part of the program. Teachers will be in regular contact with students via WebMail (Connections' proprietary, closed-system email program), telephone, LiveLesson sessions, discussion boards, message boards, and other channels. Teachers will motivate, provide instruction, monitor and evaluate student progress, personalize the curriculum, intervene as needed to ensure student success, lead field trips, and clarify the curriculum for the students. CalCA Monterey Coast will provide integral tools to help teachers ensure students are successful including ongoing and comprehensive professional development in online learning pedagogy, curriculum with a focus on Common Core instructional shifts, data-driven instructional decisions, and the school's adopted *Core Competencies for Facilitating Student Learning*. Additional California-focused professional development events will also be offered throughout the year.

The CalCA Monterey Coast program will integrate school, community, and home. Another critical factor for success is the Learning Coach. The Learning Coach, a parent or other parent-designated caring adult, plays an active role in the learning process, providing input and communicating regularly with teachers. The California Connections Academy program integrates school, community, and home via online and face-to-face activities. School staff members in coordination with parent volunteers facilitate enriching in-person community activities and field trips to round out the comprehensive learning experience. California Connections Academy 2018 Parent Satisfaction Survey results indicated that 95% of California Connections Academy parents agree that their child/children are satisfied with the program, and 95% report that the quality of the curriculum is good or excellent.

Students will have access to a wide range of clubs and activities that provide social opportunities and support students' academic progress in topics including language arts, reading, science, math, the arts, and more. Examples of clubs include: Art Club, Author's Corner, Debate Club, *The Monitor: Student Blog*, Poetry Corner, ePals, and Science Sleuths. These activities encourage students to explore interests beyond the classroom, develop leadership skills, and make friends within their school and with students from other schools. The school also participates in established chapters of the National Honor Society and National Junior Honor Society, providing students with additional opportunities for developing social, leadership, and community involvement skills.

California Connections Academy Schools serve highly mobile students with complex needs known to impact academic performance. These students' needs include, among others, health concerns, bullying and safety, looking to be challenged, trying to catch up, and flexible scheduling. Students benefit from instruction that is individualized, personalized, and flexible.

## HIGH QUALITY VIRTUAL EDUCATION FOR THE MONTEREY COAST REGION

California Online Public Schools (“CalOPS”), a 501(c) 3 non-profit corporation incorporated in California, is the governing board for California Connections Academy Schools. The board has conducted extensive due diligence in evaluating the need for a virtual school and virtual school program providers in the region. The Board is interested in Connections as the proposed primary service provider for a number of reasons, including the following:

- Members of the Governing Board have extensive experience governing California Connections Academy schools in other regions. They have seen students at these schools succeed and believe in the importance of replicating this model in other California communities.
- The existing California Connections Academy Schools use the Connections curriculum and instructional program that has proven successful over many years in communities across California as well as in other states, and was the first program of its kind to be nationally certified.
- Connections has an enviable track record of supporting schools and achieving measurable learning gains (student growth models) and receives high marks from independent evaluation organizations.
- The Connections program is the first virtual school program to receive accreditation for its program from the Commission on International and Trans-Regional Accreditation (CITA), now a part of AdvancED™, the world’s largest accreditation body for K–12 school programs, serving more than 27,000 public and private schools and districts across the United States and in 69 countries that educate over 15 million students. Connections was first granted accreditation in 2005, which was subsequently renewed in 2015. During this most recent reaccreditation process, Connections’ overall scores exceeded AdvancED’s average score for all of the schools and corporations AdvancED accredits. AdvancED reviewers noted that “Connections Education’s quality assurance processes and data-driven culture lead to systemic, systematic, and sustainable continuous improvement.”
- Connections has a proven track record both nationally and internationally, providing services to over 70,000 students in 35 schools across 27 states during the 2017-18 school year. In addition, through its partnership with school districts and other entities, Connections delivers online courses to over 340,000 students. In total, over 400,000 students in the U.S. and 48 countries will be receiving online education from Connections in 2018.

- Connections has substantial research and proof of learning gains, collected and analyzed carefully over 15 years. As detailed herein, there are multiple independent data points proving the efficacy of virtual learning, and specifically Connections' results, that provide strong evidence of the measured learning gains and student success using this model. There is a great deal of recent published research on this topic, available from iNACOL (International Association for K-12 Online Learning) ([www.inacol.org](http://www.inacol.org)), the annual Keeping Pace with K-12 Online Learning report<sup>5</sup> ([www.evergreenedgroup.com](http://www.evergreenedgroup.com)), and other well-respected third-party data sources. Further information on the student outcomes achieved through the Connections program is available at <http://www.connectionsacademy.com/proven-results/ratings-results.aspx>.
- The breadth and depth of curriculum, accommodations for exceptional populations, including but not limited to special needs students, struggling learners, gifted and talented students, and low income families, makes Connections an ideal fit for the mission, vision, and needs of CalCA Monterey Coast.
- Connections Education was formed in October 2001 to serve schools and students in the emerging K-12 virtual school market. In November 2011, the company was acquired by Pearson Education, Inc., a subsidiary of the public company Pearson PLC. Through a Statement of Agreement, Connections can provide educational services, including curriculum; curriculum support personnel; Connexus®, a comprehensive Educational Management System (EMS); professional development; student, parent, and teacher technical assistance; and additional consulting and support for virtual charter schools in California.

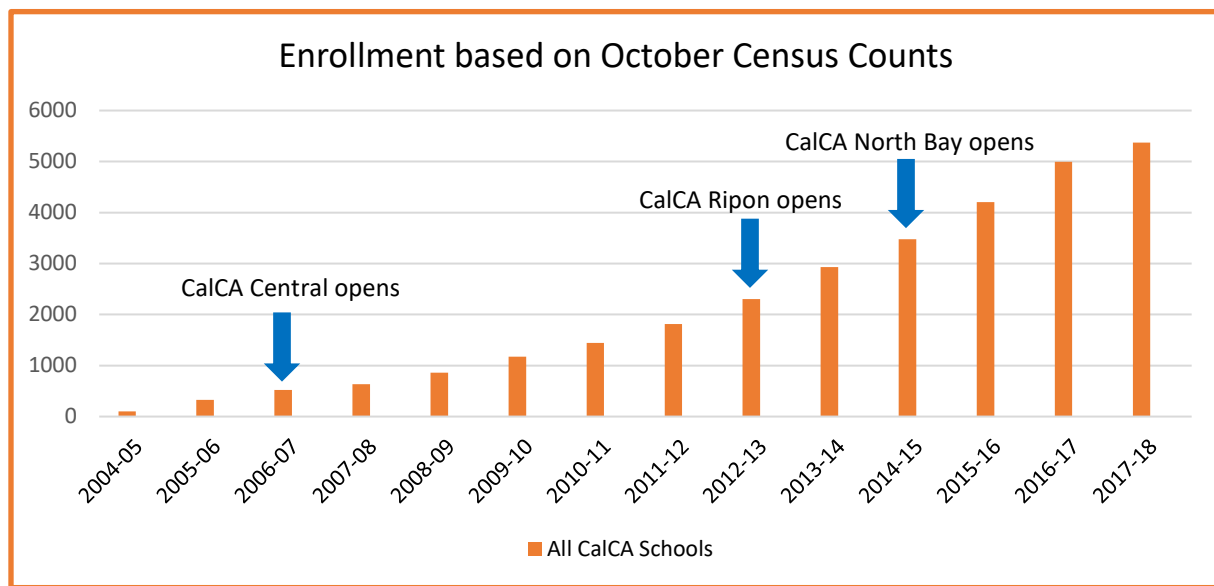
### ENROLLMENT AND DEMOGRAPHICS

The four CalCA schools currently in operation have experienced steady enrollment growth. Figure 2 demonstrates the growth trends for all CalCA schools combined, starting from the opening of the first school in 2004-05 through the 2017-18 school year, when four schools were in operation across 25 counties.

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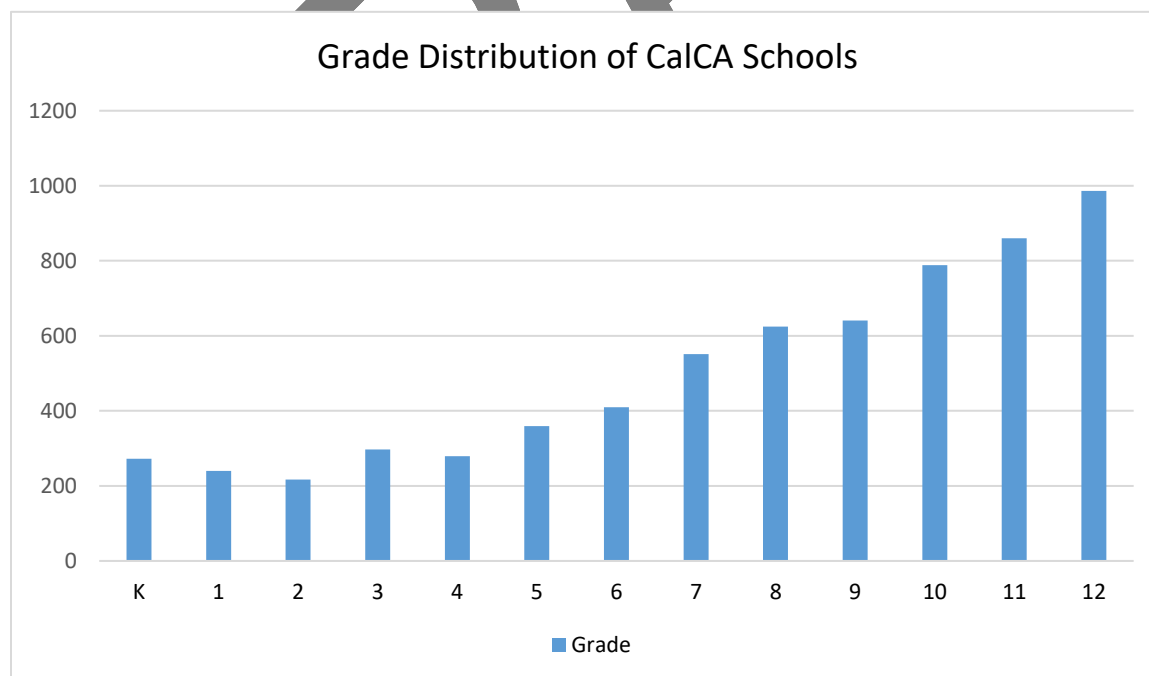
<sup>5</sup> <https://www.evergreenedgroup.com/keeping-pace-reports/>

**Figure 2. Enrollment based on October census counts<sup>6</sup>**



Each school serves a diverse population and follows similar patterns. The following data points are compiled based on official state data from all four existing schools. Figure 3 illustrates the grade distribution as of the census count in October 2017, with grades 9-12 representing grade band with the largest number of students.

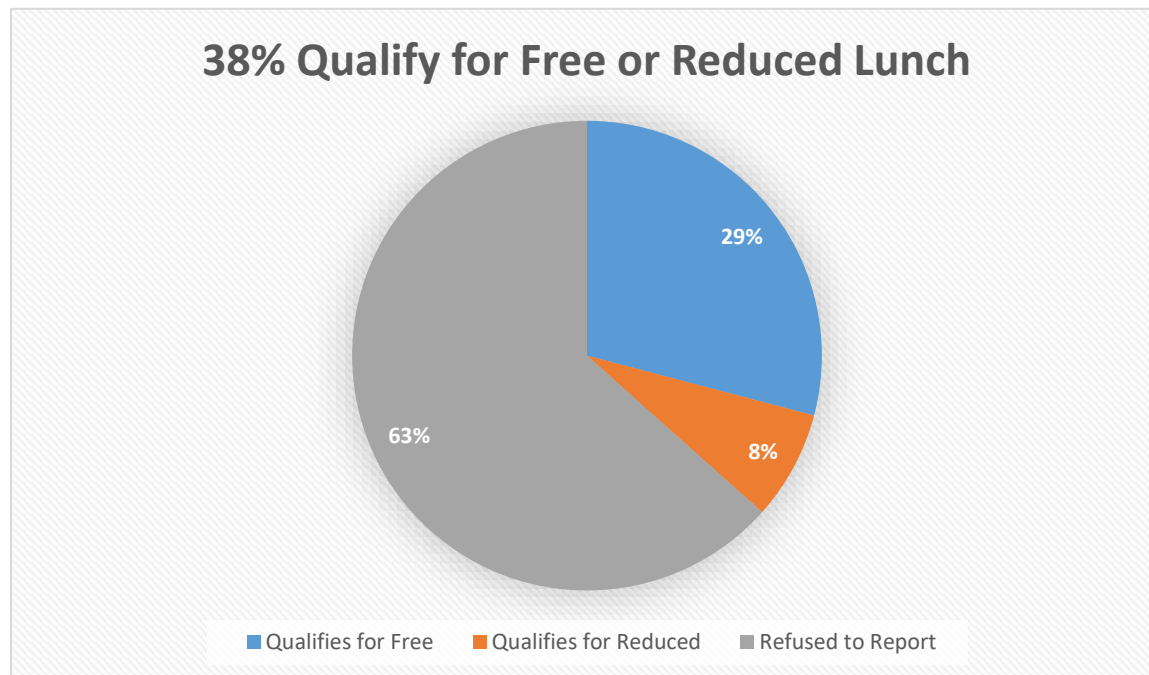
**Figure 3. Grade Distribution of CalCA as of October 2017**



<sup>6</sup> Any student data provided in this draft application is preliminary and may be re-analyzed after further review.

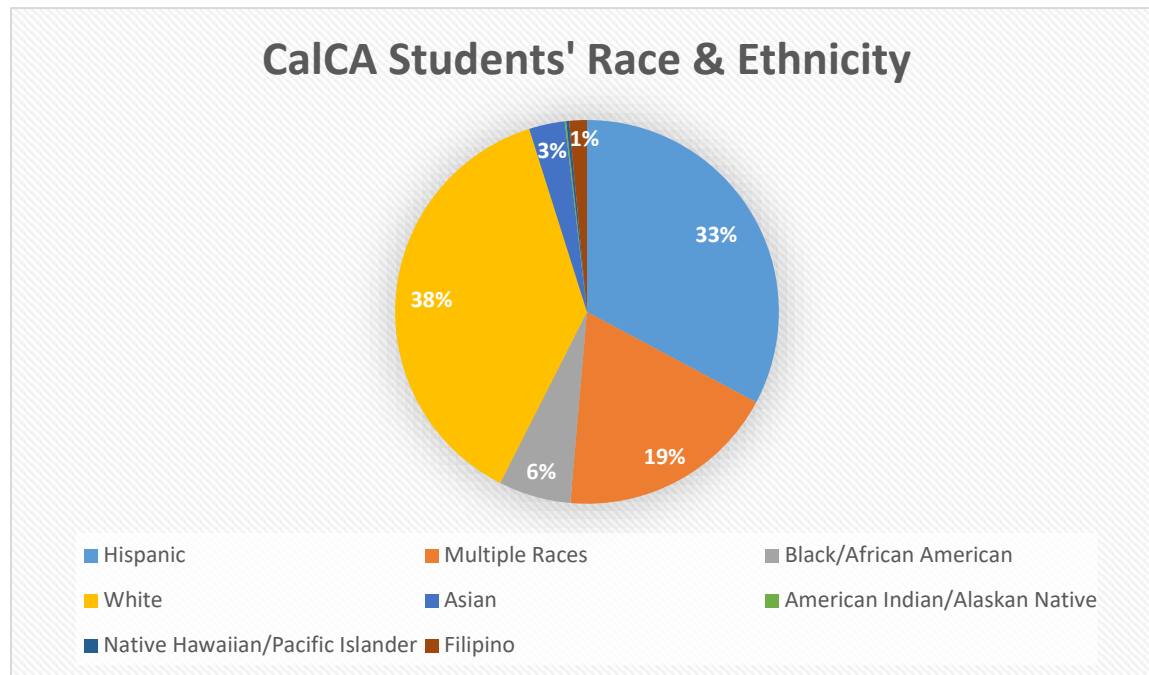
In addition, approximately 38% of the students served by the four CalCA schools (as of October 2017) are socio-economically disadvantaged, when measured by family income eligibility (defined as qualifying for free or reduced price meal benefits), as illustrated in Figure 4. Please note that this number is an estimate as 21% of families choose not to report this information.

**Figure 4. Percentage of Enrolled Students Meeting Free and Reduced Lunch Criteria as of October 2017 for CalCA**



The CalCA schools also serve a diverse student population with 32% of students identified as Hispanic, 18% of students identified as Multiple Races, 3% of students identified as Asian, and 6% of students identified as African American, as of October 2017 as illustrated in Figure 5.

Figure 5. Ethnicity Breakdown of CalCA as of October 2017



## ACADEMIC ACCOUNTABILITY

### California Accountability

The four CalCA schools have also experienced high achievement results. While the state was still using Academic Performance Index (API), the schools open at that time had high overall API scores ranging from 739 to 807 and had similar schools ranking above average.

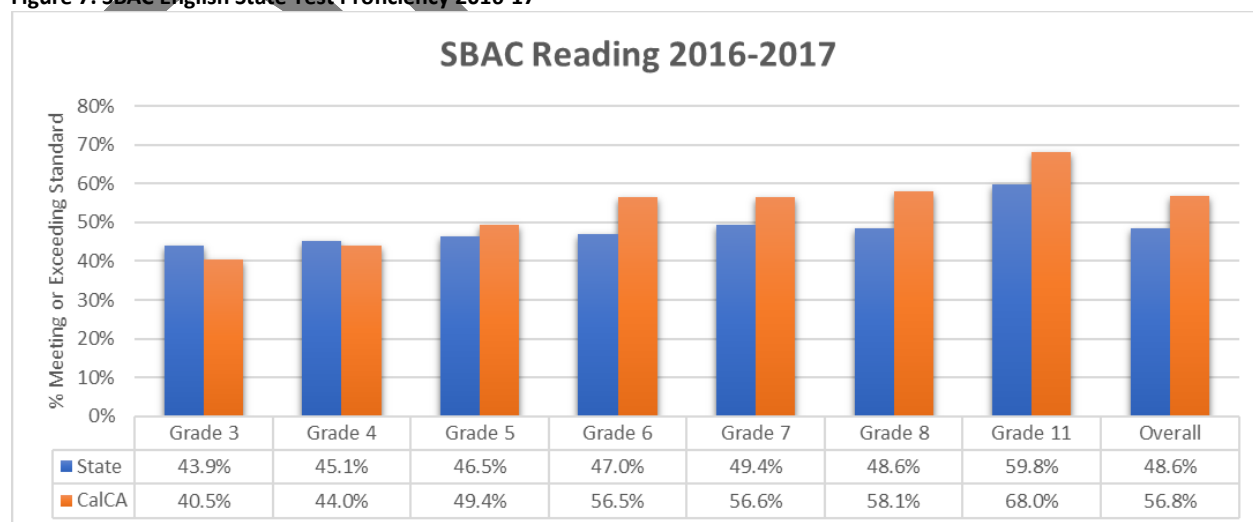
Figure 6 provides some of the historical academic performance for these schools while API was in place.

**Figure 6. Historical Academic Performance on API**

	Academic Year	Overall API	Statewide Decile Rank	Similar Schools Rank
<b>California Connections Academy Southern California (formerly known as Capistrano Connections Academy - Opened in 2004)</b>				
	2010-11	779	7	9
	2011-12	777	7	7
	2012-13	791	8	9
<b>CalCA Central (Opened in 2006)</b>				
	2010-11	776	4	10
	2011-12	739	5	9
	2012-13	759	5	7
<b>CalCA Ripon (Opened in 2012)</b>				
	2012-13	807	8	10
<b>CalCA North Bay (Opened in 2014)</b>				
	N/A	N/A	N/A	N/A

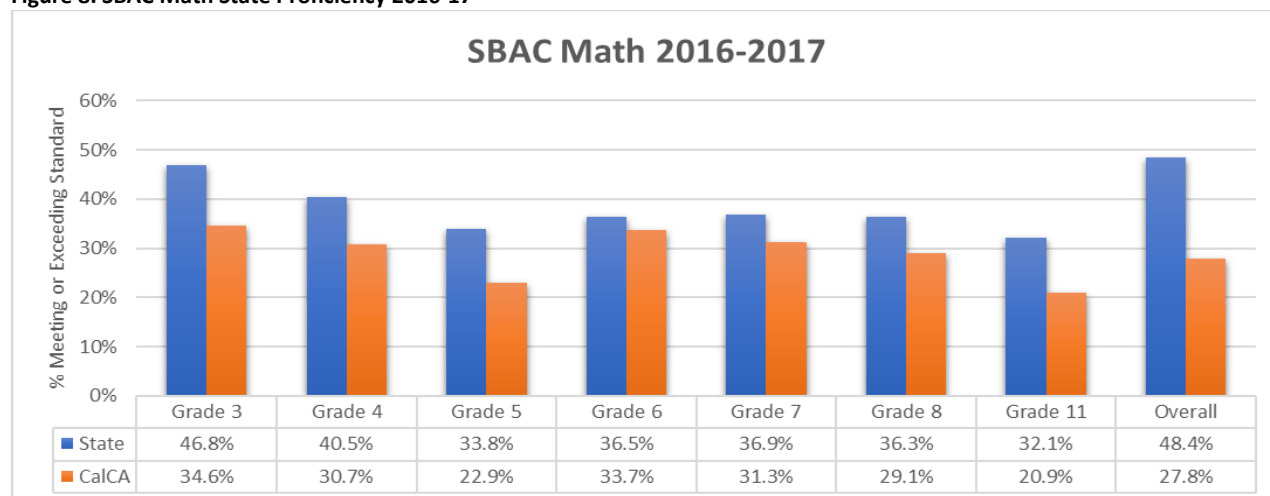
In the administration of the CAASPP tests from the spring of 2017, CalCA students have met or exceeded the state in reading at every grade-level, as shown in Figures 7 and 8. CalCA students have performed below the state average in math, however, some improvements were seen between 2015-16 and 2016-17, especially in grades 5 and 6. The middle school grades have the strongest math scores when compared to state averages.

**Figure 7. SBAC English State Test Proficiency 2016-17**





**Figure 8. SBAC Math State Proficiency 2016-17**



One important factor to consider is how the school is performing relative to other schools that serve similar populations of students. There are not many public schools which serve students in all grades K-12 (and which would therefore have comparable academic data). One previously available method used to analyze how a school is doing relative to other schools was the state's Similar Schools Ranking. While the state has not yet devised a replacement for the similar schools ranking, it is expected that when data is available to compare Connections Academy schools' academic performance to other schools which serve similar student populations, the school will be able to continue to demonstrate that they are doing well educationally with the students they are serving. The California Charter School Association has already begun comparing data between schools, including both charter schools and traditional public schools.

The California Charter Schools Association (CCSA) also prepares an annual report that focuses on charter accountability and renewal. As a component of the report, CCSA also prepares a detailed analysis of the Similar Students Measure (SSM) which compares a school's performance on the state tests to a predicted level of performance based upon the student profile. It is akin to the state's Similar Schools Criteria; however, it focuses more on student level data than school wide data. This is one of the measures used by CCSA to review charter school performance.

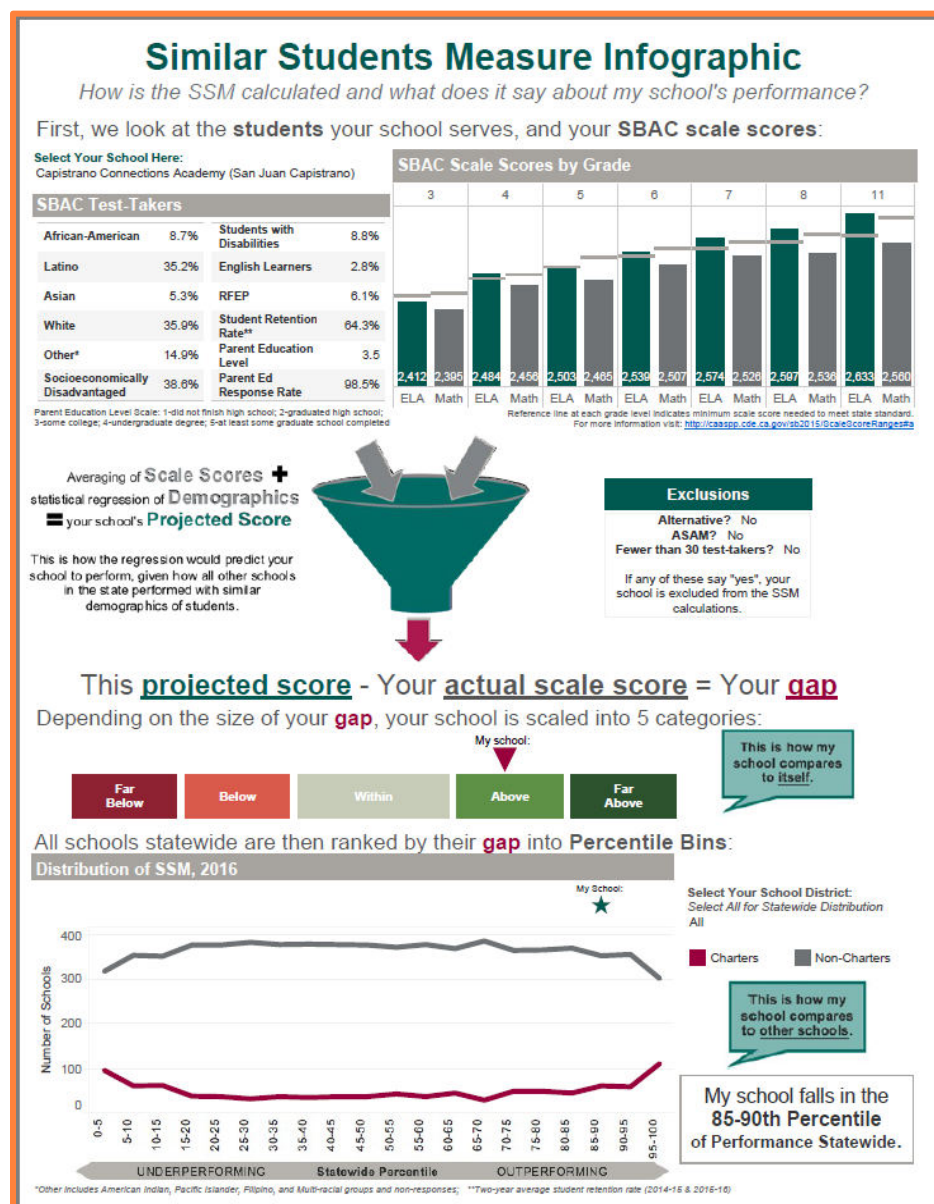
Figure 9 is an illustration of one of these CCSA Accountability reports, which can also be found on the CCSA public website ([www.ccsa.org/advocacy/accountability](http://www.ccsa.org/advocacy/accountability)). The school shown is California Connections Academy SoCal.

Figure 9. CalCA SoCal CCSA Academic Accountability Report 2016-2017



It is important to note that schoolwide standardized test scores may fluctuate from year to year. Student mobility and growth rate are important factors in analyzing academic performance. Due to the unique virtual school program offered, which uses an independent study model, virtual schools experience student turnover both during the year, as well as from year to year. Many students and families choose a virtual school program to serve a unique need for a particular period of time, i.e. medical reasons, sports, family move, bullying, and so forth. Their intent is to solve a family issue and enroll in a virtual school for a limited time. Due to the relatively small size of CalCA Monterey Coast, it could be particularly susceptible to enrollment fluctuations and thereby have an impact on academic performance data.

Figure 10. Capistrano Connections Academy CCSA SSM Infographic with 2015-16 data



It is important to note that schoolwide standardized test scores may fluctuate from year to year. Student mobility and growth rate are important factors in analyzing academic performance. Due to the unique virtual school program offered, which uses an independent study model, virtual schools experience student turnover both during the year, as well as from year to year. Many students and families choose a virtual school program to serve a unique need for a particular period of time, i.e. medical reasons, sports, family move, bullying, and so forth. Their intent is to solve a family issue and enroll in a virtual school for a limited time.

In the context of the study conducted of representative Connections Academy schools nationally for students enrolled during the 2013–2014 to 2015–2016 academic years, the following comparative statements about the efficacy of Connections Academy schools have been validated:<sup>7</sup>

- There was no statistical difference in percentage scoring proficient in math and reading between student cohorts in Connections Academy schools and cohorts in brick-and-mortar schools that were matched on prior achievement; and after adjusting for district-mean student mobility and school-mean student socioeconomic status and other demographic factors.
- Student cohorts in Connections Academy schools statistically outperformed (by 7.9 percentage points) cohorts in other virtual schools (matched on prior achievement) in terms of the percentage scoring proficient in reading on state assessments.
- There was no statistical difference in percentage scoring proficient in math between student cohorts in Connections Academy schools and cohorts in other virtual schools that were matched on prior achievement.

In addition, the state has used several methods in calculating the school scores on the CAASPP tests that create a negative impact for any student who does not participate. For example, those students may be assigned the lowest possible score when calculating the school's overall academic performance. Due to the challenges of setting up in-person testing locations, as well as the challenge of many parents who elect to "opt out" of state testing, each school's test scores may be negatively impacted by these and other methods of calculation in use by the CDE.

Student academic achievement is the highest priority for CalCA Monterey Coast. Over the past several years, all the school has put in place several significant interventions to ensure that student performance exceeds the growth targets, especially among the subgroup populations. These activities have been included in the school's improvement planning, including the Western Association of Schools and Colleges (WASC) Action Plan and the Local Control and Accountability Plan (LCAP). These include:

- Implementing Math We've Got This! and Math Time to Talk;
- Analyzing in-depth assessment data on individual students, which is now even more readily available to teachers and school leadership at the click of a button;
- Targeting intervention courses for students who are underperforming;
- Adding specialized staff dedicated to providing intervention type instruction;
- Expanding the existing intervention programs;

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<sup>7</sup> <https://www.pearson.com/content/dam/one-dot-com/one-dot-com/global/Files/efficacy-and-research/reports/audited/Connections-Academy-research-report.pdf>

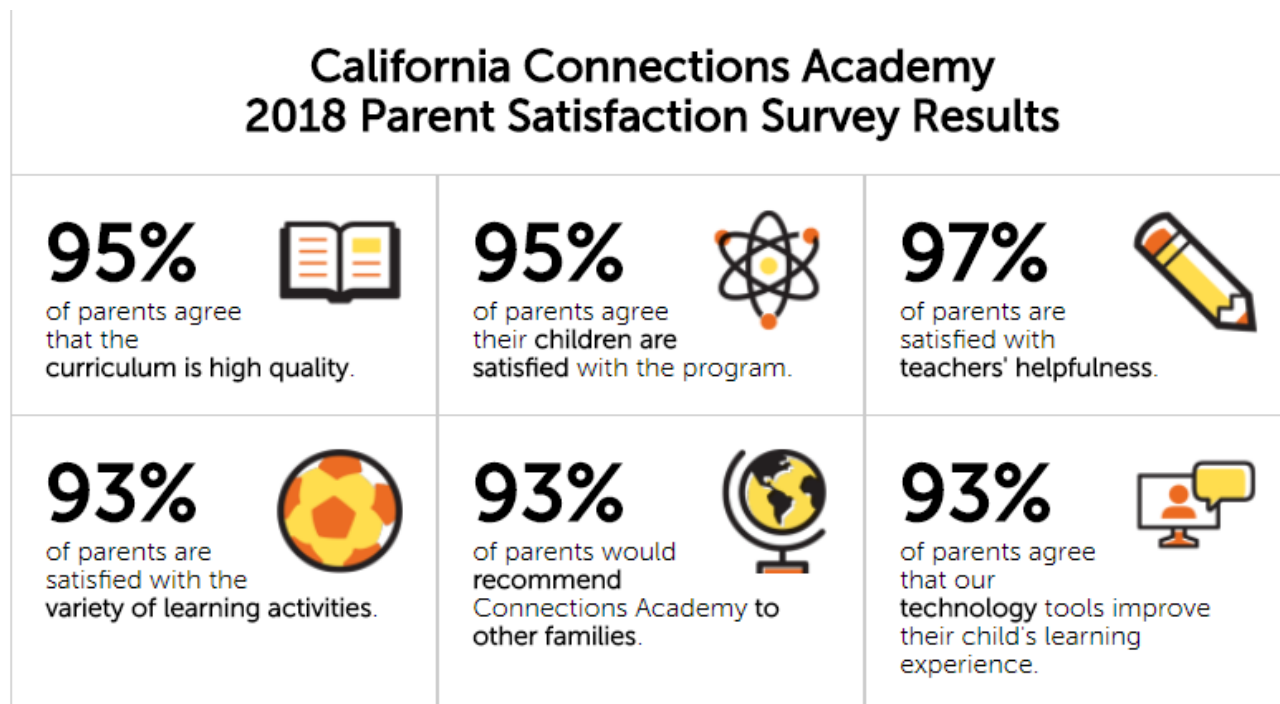
- Implementing Professional Learning Communities (PLCs) within the faculty;
- Adding targeted professional development for teachers aimed at areas of greatest student need; and
- Adding academic resources and supplemental materials for students who are struggling, especially in math.

Regularly evaluating the academic performance of students, using student performance data to drive changes and improvements to the school program, increasing use of PLCs, and developing annual goals and plans to increase student academic achievement all demonstrate a dedication and focus on student performance.

### **PARENT SATISFACTION**

Figure 11 presents the most recently compiled parent satisfaction survey results from the four CalCA schools. The schools have consistently received high ratings on annual parent surveys. Parents are surveyed annually; the results are compiled by an independent third-party research firm, and presented to the school staff and its respective Board. Parent surveys provide quantifiable data by which the school leadership can work towards improving various aspects of the school. It also provides a valuable source of parent input into the planning process for school improvement, such as the development of the Local Control and Accountability Plan. Over the past several years, the percent of parents who have responded to the survey has varied from 35% to 50%. Therefore, these results are considered reflective of the overall experience of the families.

Figure 11. Parent Satisfaction Survey Results for 2018



The following testimonials are from students and parents enrolled in the four CalCA schools. The testimonials were unsolicited and represent a sample of the kudos that the teachers and school receive on an ongoing basis. Some of the testimonials have been slightly revised for privacy purposes.

### Connections Exceeds Expectations

This is my son's second online school experience. Connections far exceeded our expectations. The quality of teachers, the feedback and response time, and the ability to track my son's progress is outstanding. As a fellow educator I appreciate the structured format that allows my son take responsibility for his education. I am able to see what he is doing and give him feedback on how he can better himself. Thank you for developing a comprehensive program.

### California Connections Academy is Great

I feel compelled to reach out and let you know that I believe Connections Academy is a great school. When my students were enrolled in a "credited public school" that was being recognized for their academics, my student was not being challenged to excel. Since enrolling my first child, my family has grown. I now have had all four of my children attend Connection's Academy from K-9, my youngest being in first grade. My oldest son who is a junior in high school is taking college courses at CalPoly which is adjacent to his high school. Your program has allowed my children to have the time to train in Jujitsu from the age of 6. Now at the ages of 16 and 14 my older two sons are physically fit and well educated enough to be Fire Explorers and give back to their community. Your program has allowed them to learn time management that has hugely impacted the way they run their lives. These things will not show up on a state test.

### **Credentialed and Certified Teachers Supporting Students**

When my son started middle school, we encountered many issues with the traditional bricks-and-mortar school. It was a very unsafe and hostile environment for any student, and he was becoming unmotivated to write. We wanted to support him and our daughter by finding a better school environment, so we searched the Internet and found several online schools and their presentations. We decided to enroll him in a California Connections Academy school because of its teachers' credentials, certifications, and enrichment curriculum; it was a relief to have found this school.

He likes the school for the flexibility of the school; he likes that it's a mixture of homeschool and interaction with students and teachers. He really is on task with school, without being distracted. It gives him the flexibility to organize his schedule and time. He can take classes even when he travels. He likes most of his classes, but his favorite is math, because it helps him to rest his mind from other subjects.

### **Good Fit for Family and Lifestyle**

We chose an online school because it fits well with our family and lifestyle. We like being able to participate in our children's education and having the organization, flexibility, and structure California Connections Academy provides. We are able to spend more time on a subject if needed, or advance more quickly. We also feel secure knowing that our children are protected from negative outside influences, including bullying.

### **Our Teacher is a Great Communicator**

My son had an exceptional first year with Connections Academy!! His teacher was such a wonderful communicator and informed me of all the ins and outs so I didn't feel like I was as intimidated as I thought I was going to be as a learning coach. Her guidance and little tips to help with the learning process was greatly appreciated!! We love Connections Academy

### **Students Appreciate the CalCA Teachers**

Dear Teachers, Hi! I'm in 7<sup>th</sup> grade. I just wanted to say thank you for all your hard work this year! You are the ones that make learning possible for all of us students :). All that diligent effort of correcting tests and holding LiveLessons has played off, and we are prepared to move on to the next grade, thanks to you! You are all real great! Thank you so much for helping me this year and to help me learn new things that will help so much in the future! I really appreciate all the work you go through, like going to college for many years to help us, correcting 45 question tests, and helping us to understand the material that is not familiar to us. Thank you!



## ACCOMPLISHMENTS

California Connections Academy Schools are proud of their accomplishments:

### Academic and Educational Achievements

- In recognition of an effective and innovative educational approach, the four existing CalCA schools are fully accredited for grades K–12 by the Western Association of Schools and Colleges (WASC).
- Connections Education is a University of California (UC) approved provider, and has over 100 courses on the approved "a-g" course list, covering all four core content areas as well as many electives. California Connections Academy Schools are able to integrate in-person wet labs into science courses, thereby meeting the "a-g" requirements for lab science courses.
- Recently, over 40 Career Tech Education (CTE) and Visual/Performing Arts courses received "a-g" approval, allowing California Connections Academy students to more easily meet the "a-g" requirements while enrolled in an online school setting.
- When compared to other schools serving similar demographic populations, the California Connections Academy Schools show that they outperform these comparator schools. This was evident in the similar schools rankings given by the state in past years. Since that ranking has been discontinued, the comparisons done by CCSA have continued to show that the California Connections Academy Schools are providing a high-quality education for the students served, based on high Similar Student Measure rankings (see also the Academic Accountability section).
- More than eighty courses offered by Connections meet National Collegiate Athletic Association (NCAA) approval.
- California Connections Academy Schools successfully implement and have expanded programs for Gifted and Talented students (GATE).
- California Connections Academy Schools have improved and expanded on the English Learner (EL) program, including introducing credit bearing courses for high school EL students in the fall of 2017.



- California Connections Academy Schools have shown success with the EL students served. For EL students who took the CELDT test two years in a row, 83% showed improvement in scores from 2013-14 to 2014-15, 55% improved between 2014-15 and 2015-16 and 71% of those tested improved between 2015-16 and 2016-17. (NOTE: Because of changes in the state language test, comparisons were not conducted during 2017-18) In addition, the percent of EL students who were reclassified to fluent was approximately 13% between the fall of 2016 to the fall of 2017 and approximately 16% from the fall of 2015 to the fall of 2016.
- California Connections Academy Schools have been pioneers in the implementation of an Advancement via Individual Determination (AVID) program in an online learning environment. The program supports students in grades 6–12 in order to further prepare them for college and other post-secondary options. Grade 12 along with a credit bearing AVID course was just added for 2018-19.
- California Connections Academy Schools implement and continuously improve instructional materials, methods, strategies, technology, and course offerings in the virtual setting.
- California Connections Academy Schools hire, retain, and promote excellent staff with all teachers meeting state and federal credentialing requirements.
- California Connections Academy Schools consistently increase the offerings and effectiveness of staff training and professional development.
- In 2017-18, the California Connections Academy Schools graduated 554 students.
- The schools enroll many high school students who are credit deficient or who have been out of school altogether for a period of time. While this creates a group of students who are off their cohort for graduation, the schools are able to successfully support many of these students so that they are ultimately able to graduate. This population of students causes the four-year cohort graduation rates for the California Connections Academy Schools to be low compared to state averages, however, if five- and six-year cohort rates are calculated, the schools are able to show that most of the credit deficient students do eventually graduate.
- California Connections Academy Schools implement a quality Special Education program in a virtual environment, which includes having a Special Education Director, a dedicated administrative team, and multiple Education Specialists on the school staff. On the most recent parent satisfaction survey, 84% of parents agree that they are satisfied with special education services provided through CalCA schools. Survey responses were provided by 390 parents of children who were diagnosed with a learning disability and have an IEP.
- Graduates from the California Connections Academy Schools in 2017-18 were awarded \$1,196,141 in scholarships.

- Students who graduated from California Connections Academy Schools have been accepted at the colleges listed in Figure 12.

**Figure 12. College Acceptances for Graduates of Schools Supported by Connections**

College Acceptances for Graduates of Schools Supported by Connections		
<ul style="list-style-type: none"> <li>• Allegheny College</li> <li>• Art Center College of Design</li> <li>• Art Institute of California</li> <li>• Azusa Pacific University</li> <li>• Berklee College of Music</li> <li>• Brigham Young University</li> <li>• Butler University</li> <li>• California Baptist University</li> <li>• California Lutheran University</li> <li>• California Maritime Academy</li> <li>• California State Polytechnic University: Pomona</li> <li>• California State University: Chico, Dominguez Hills, East Bay, Fullerton, Long Beach, Los Angeles, Monterey Bay, Northridge, Sacramento, San Bernardino, and San Marcos</li> <li>• Castleton State College</li> <li>• Central Washington</li> <li>• Chaminade University of Honolulu</li> <li>• Chapman University</li> <li>• Cogswell Polytechnical College</li> <li>• Colorado State University: Pueblo</li> <li>• Concordia University</li> <li>• Creighton University</li> </ul>	<ul style="list-style-type: none"> <li>• Elmira College</li> <li>• Fairfield University</li> <li>• George Fox University</li> <li>• Hofstra University</li> <li>• Iowa State University</li> <li>• Johns Hopkins University</li> <li>• Johnson &amp; Wales University</li> <li>• Loyola Marymount University</li> <li>• McDaniel College</li> <li>• Mills College</li> <li>• Montana State University: Bozeman</li> <li>• Northern Arizona University</li> <li>• Northwest University</li> <li>• Ohio Wesleyan University</li> <li>• Pace University</li> <li>• Point Loma Nazarene University</li> <li>• San Diego State University</li> <li>• San Francisco State University</li> <li>• San Jose State University</li> <li>• Santa Clara University</li> <li>• Sonoma State University</li> <li>• Southern New Hampshire University</li> <li>• St. John's College</li> <li>• St. Norbert College</li> <li>• Texas A&amp;M University</li> <li>• University of Alabama</li> <li>• University of Arizona</li> <li>• University of British Columbia</li> </ul>	<ul style="list-style-type: none"> <li>• University of California: Berkley, Davis, Irvine, Los Angeles, Riverside, Santa Barbara, and Santa Cruz,</li> <li>• University of Colorado at Boulder</li> <li>• University of Denver</li> <li>• University of Hawaii at Manoa</li> <li>• University of Illinois at Chicago</li> <li>• University of La Verne</li> <li>• University of Michigan: Ann Arbor</li> <li>• University of Montana</li> <li>• University of Nebraska - Lincoln</li> <li>• University of North Dakota</li> <li>• University of Oregon</li> <li>• University of Puget Sound</li> <li>• University of Redlands</li> <li>• University of San Francisco</li> <li>• University of the Pacific</li> <li>• University of Toronto</li> <li>• University of Utah</li> <li>• University of Vermont</li> <li>• Ursinus College</li> <li>• Utah State University</li> <li>• Utica College</li> <li>• Vanguard University of Southern California</li> <li>• Whittier College</li> <li>• Willamette University</li> <li>• Woodbury University</li> </ul>

## Other Achievements

- School climate and culture are strong across all California Connections Academy Schools. Multiple indicators, aligned with the state’s educational priorities, demonstrate this. For example, both staff members and families report a very a positive experience with the school. Annual surveys show that CalCA schools earn a high level of parent, staff, and student satisfaction.
- California Connections Academy Schools have increased the number, location, and type of field trips offered to families each year. During the 2017-18 school year, there were over 278 field trip events and 5,790 family members across California attended.
- California Connections Academy Schools host in-person graduation ceremonies each year for their graduates. In 2017-18, there were approximately 260 senior graduates that attended a commencement ceremony. Total attendance with families was approximately 2,300, not including staff. In-person 8<sup>th</sup> grade promotion ceremonies are also offered.
- High school students have the opportunity to attend a senior prom and Grad Night. During the 2017-18 school year, 148 students attended prom and 70 attended the winter formal. 68 students attended Grad Night.
- Families attend multiple school functions, such as picnics and celebrations. California Connections Academy Schools typically offer three picnic events each year for each school site to allow family members to meet each other and to meet staff in person.
- The California Connections Academy Schools have an active chapter of both the National Honor Society (NHS) and National Junior Honor Society (NJHS) to further enhance opportunities for both students as well as the communities served by the school.
- School suspension rates are very low at the CalCA schools — in some years there are no suspensions for disciplinary reasons — and there have been no expulsions since inception.
- California Connections Academy Schools serve socioeconomically, racially, ethnically, and geographically diverse student populations.
- California Connections Academy Schools build strong school communities through both face-to-face and virtual interactions.
- CalCA Monterey Coast will enjoy a strong partnership with the existing California Connections Academy Schools non-classroom-based “sister” charter schools located in other areas of the state, which allows the allocation of various resources to maximize access for all students to a comprehensive, full service program, while minimizing fiscal impact.

- The California Connections Academy Schools perform outreach and participate in many community events, and also collaborate with community organizations. Examples of community involvement among the CalCA schools include:
  - CalCA SoCal has participated in food drives and provided volunteers for the Second Harvest Food Bank of Orange County, Los Angeles Rescue Mission, and Riverside County Food Bank. The school has participated in multiple community events such as the Los Angeles Times Festival of Books, the San Diego EarthWorks Earth Fair, the Riverside Municipal Airport Airshow, the Orange County Book Festival, the Carlsbad Chalk Festival, the Redlands Market Night, and the Juvenile Diabetes Research Foundation awareness events.
  - CalCA Central participates annually in a “Cards for Heroes” event through a local Veteran’s association, where holiday cards are sent to military personnel overseas. The school has also has been a member of the Visalia Chamber of Commerce. The school has provided support to several baseball teams, including the Fresno Grizzlies, the Visalia Rawhide, and the Bakersfield Blaze. The school hosted representatives from the legislative offices of several Central Valley state lawmakers at its ten-year anniversary events. In addition, the school has participated in multiple community events such as the Big Fresno Fair, the World Ag Expo, the Kern County Nut Festival held at the Kern County Museum, the Old Town Clovis Farmer’s Market (in partnership with a local radio station), the Annual Fresno State University Vintage Days event, the Green Expo in Bakersfield, the Kingsburg Auto Show (in conjunction with the Kingsburg Chamber of Commerce), and the Thursday Night Marketplace operated by the City of Hanford’s “Main Street Hanford” organization.
  - CalCA Ripon is an active member in the Ripon Chamber of Commerce and has been a frequent participant in Ripon’s annual Main Street Day celebration. The school has partnered with such organizations such as the City of Modesto, the Environmental Council of Sacramento, and the City of Stockton in conjunction with their annual Earth Day Festivals. Other organizations the school has partnered with include the City of Pleasanton, the City of Fremont Kids and Kite Festival, the East Bay Women’s Conference, Silicon Valley Comic-Con, the Oakdale Chocolate Festival, and the Bay Area Book Festival in Berkeley. The school participated in Juvenile Diabetes Research Foundation awareness events and has also collected and distributed food donations to the San Joaquin Food Bank.

- CalCA North Bay has participated in several Earth Day events, including the Earth Day Festivals of Santa Rosa and Napa. The school also has been part of the Science Discovery Days at the Sonoma County Fairgrounds. In addition, the school has participated in multiple community events such as the City of Sebastopol Apple Blossom Festival (hosted by the Chamber of Commerce), the City of Petaluma Butter and Egg Days, the Celebrate Davis event (in conjunction with the Chamber of Commerce), the 123<sup>rd</sup> annual Luther Burbank Rose Parade and Festival, the NASCAR Toyota event at the Sonoma Raceway, and the City of Windsor Holiday Tree Decorating event.
- School staff members routinely speak at conferences on online learning as well as other charter school topics. For example, administrators from the school presented at several conferences in recent years, including the Educating for Careers conference and the International Conference on Learning, the Advanced Placement Annual Conference, and the California Charter Schools Association conference.
- CalCA schools are fiscally stable as evidenced by balanced budgets, adequate cash flow, and stable reserve balances.
- Each of the annual audit reports for CalCA schools have been completed with no findings.
- CalCA schools implement thorough attendance accounting procedures to allow accurate recording of student attendance in a non-classroom based school.
- CalCA schools comply with the requirements of state and federal law as applicable to charter schools.
- CalCA schools comply with the terms of their respective charters including, but not limited to such areas as Governing Board composition and Governing Board policy, health and safety, human resources, financial reporting, insurance, audits, educational offerings, academic outcomes, and so forth.

## I. FOUNDING GROUP

*Describe the founding group for the proposed charter school, providing evidence that the applicant(s) possess(es) the necessary background in the following areas critical to the charter school's success and/or that the founders have a plan to secure the services of individuals who have the necessary background in these areas:*

- Curriculum, instruction and assessment;
- Finance, facilities, and business management; and
- Organization, governance, and administration

### I.A GOVERNING BOARD

CalCA Monterey Coast will be governed by the non-profit Governing Board, California Connections Academy Online Public Schools (CalOPS).<sup>8</sup> The Governing Board has extensive experience functioning as a charter school Governing Board as well as expertise in business, education, technology, and finance. The Governing Board currently consists of the following individuals:

- **Elaine Pavlich, Board President:** Elaine Pavlich is a transplant to California over 20 years ago from Pennsylvania. She graduated from Reading High School and worked for The Gap in several locations in a management capacity. Upon moving to Southern California, she met her now-husband and continued to work as Store Manager for The Gap in Huntington Beach until leaving on maternity leave in 1999. Being a stay-at-home mom to Wynnter was Ms. Pavlich's true passion. Wynnter had been enrolled in the local brick-and-mortar elementary school for first grade and while Ms. Pavlich helped both in the classroom and with lunch tables and recess monitoring, as well as on the School Site Council and with the PTA, she felt that she would rather teach Wynnter at home. That brought the Pavlich Family to Capistrano Connections Academy very soon after the school first opened.

Wynnter graduated from California Connections Academy in 2017 and is pursuing a career as a make-up artist. During Wynnter's 11 years enrolled in Connections, Ms. Pavlich was a proud and devoted Learning Coach. Ms. Pavlich currently serves as Board President to the California Connections Academy Board of Directors. She has been on the Governing Board of CalCA Capistrano Board for about 10 years, serving at various times in the roles of Secretary, Treasurer, and now President. She also served in past years on the CalCA Ripon's Board as the Secretary. She has proudly been to graduation/promotion ceremonies on behalf of the board and assisted with handing out diplomas to both the eighth graders and seniors. Ms. Pavlich also volunteers with the outreach team to communicate with newly enrolled or families interested in enrolling with a California Connections Academy school to learn the perspective of the Learning Coach. This communication is done either by email, phone, online LiveLessons, or in-person meetings.

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<sup>8</sup> In August of 2018, three existing non-profit corporations were merged to form California Online Public Schools, which now governs all the California Connections Academy Schools.

- **Mr. Michael Henjum, Board Vice President:** Mike Henjum is a life-long educator, serving in various private schools in Orange County for the past 26 years as a teacher, coach, and principal. He is currently the Head of Advancement at Saddleback Valley Christian School in San Juan Capistrano. Mr. Henjum earned his B.A. from Vanguard University, M.Ed. in Educational Leadership from Grand Canyon University, and has completed additional post-graduate work at Portland State University and UC Irvine. Mr. Henjum chose to join this board because of his dedication to schools that provide a rigorous, college-prep curriculum to students and his belief that school choice is an effective way to achieve greater student achievement, with charter schools being one of the most effective vehicles to accomplish this goal. He has also served as Treasurer in past years.
- **Mr. Tim Batiuk, Board Treasurer:** Tim Batiuk has worked in education for 45 years as a teacher, counselor, and administrator in Napa, San Mateo, and Orange Counties. Most of his experience has been working in Alternative Education to develop and implement programs to enable at-risk kids to stay in school and achieve their full potential. Mr. Batiuk was the Director of Alternative Education in Napa and San Mateo where he helped launch numerous programs that provided safety nets for kids that otherwise may have dropped out. He previously served on the Community Day School Network Executive Board in Sacramento as well as on several California Connections Academy Boards in various roles, including Board President. During his 45-year career as an educator, Mr. Batiuk has consistently believed that all kids can achieve success in school and life when provided with the proper fit for their education needs and that is up to the school leaders to fulfill those needs for all kids.
- **Mr. Dave Souza, Board Secretary:** Dave Souza has extensive experience in business management. He earned an Associate's degree in Business Marketing and an Associate's degree in Fire Science from Chabot College. Mr. Souza continued his education with Cal State University, receiving his Bachelor's Degree in Business Administration. Throughout his professional career, Mr. Souza was a firefighter for four years, a Facilities Manager at Renaissance Old World, an Outside Sales Manager for Settco, Inc. in Fresno, and Director of Operations for Tesei Petroleum in Madera for ten years. He has served on a California Connections Academy Board for the past ten years and has served as Board President. He recently agreed to fill the role of Board Secretary.
- **Ms. Diana Rivas, Board Member:** Diana Rivas is an involved parent representative to two children currently enrolled in the California Connections Academy program. She has a wealth of experience as a manager, team leader, and motivator, including experience in the food service industry. Ms. Rivas has dedicated her life to serving the community, including a local Girl Scout Troop, Venture Crew, local youth sports, church groups, and serving food to those less fortunate. As a Learning Coach, Ms. Rivas understands how children learn differently and how they correlate their growing knowledge to the world around them. Her goal is to continue representing the needs and interests of students and parents. Ms. Rivas started serving as a parent representative in the spring of 2017.

- **Mr. Paul Hedrick, Board Member:** Paul Hedrick is a public high school math teacher who has been in education for 17 years. He graduated from Brigham Young University with a Bachelor's Degree in Mathematics and then earned a teaching credential in the state of California through Chapman University. He received a Master's in Education with an emphasis on Educational Technology from National University. He has worked in the Natomas Unified School District and is currently employed in the San Juan Unified School District. Mr. Hedrick has participated in textbook adoptions and with leadership groups as part of his educational career. His desire to serve on the Board comes from the feeling that students need multiple options in regards to education.
- **Veronica Schreiver, Board Member:** Veronica Schreiver earned her Bachelor of Science in Biology from Keene State College in Keene, NH. She started her career in banking while in college in New Hampshire and moved up to Operations Manager prior to moving to the west coast. She began working at E\*TRADE in California where she worked more than seven years as an Active Trading Manager and became an Options and Trading principal, as well as passing her Series 7 and 63 licenses. She then moved on to Fidelity Investments where she has been 11 years and is a Financial Consultant and Vice President working directly with high net worth clients (over \$520 M in net assets). In March 2018 she became a certified financial planner. Ms. Schreiver loves her work helping clients realize their retirement goals and needs. Ms. Schreiver chose to serve on the board to use her expertise in business/education/parent to help make the California Connections Academy program the best it can be.
- **Adam Pulsipher, Board Member:** Adam Pulsipher is currently serving as the Assistant Administrator for the California Department of Veterans Affairs- Lancaster Home. He has been working with disabled Veterans since 2015. He has enjoyed a career in the operations of Healthcare Facilities for nearly 20 years. He is small business owner and received his Master's in Business Administration in 2015. As a father of five children, quality education is a key part of his family's life. Mr. Pulsipher chose to serve on the Board of Directors to stay connected with the changes in curriculum, teaching styles and modalities, and as a way to serve in his local community. He has been a Board member since 2017.
- **Brooke Watkins, Board Member:** Brooke Watkins is the mother of four children, and was formerly a Learning Coach to one of her children who was a Connections Academy student. Ms. Watson holds a Bachelor of Science degree in School Health from California State University, Long Beach, and has experience working as a Dental Assistant. She also has experience volunteering for the Cub Scouts as a Webelos Den Leader where she helped boys achieve their Arrow of Light awards, and volunteering as an adult leader for a local church where she currently plans lessons and activities to teach leadership skills to young girls.



## **I.B SCHOOL LEADERSHIP**

CalCA Monterey Coast will have a strong and experienced leadership team to serve students. The following individuals demonstrate the quality of the leadership team who are responsible for creating high expectations for student achievement and collaboration among all CalCA stakeholders.

- **Dr. Richard Savage, Executive Director:** Dr. Savage is the Executive Director of CalOPS and the California Connections Academy Schools. Prior to joining the organization, he served as a Principal for three years at Calistoga Junior-Senior High School (CJSHS), a small rural school located at the northern end of the Napa Valley for students in grades 7–12. At CJSHS, Dr. Savage coordinated a Distinguished School Award, a successful six-year Accreditation from WASC, and a school-wide Project Based Learning implementation. CJSHS had an 80% Free and Reduced Lunch and 50% limited English proficient (LEP) student population. Dr. Savage taught high school Spanish and coached soccer and volleyball for five years. He served as a Vice Principal at an urban socioeconomically challenged high school in Southern California for six years. Dr. Savage earned his Bachelor's degree in Spanish Secondary Education with a minor in Physical Education and Coaching at Brigham Young University. He earned a Master's degree in Education Administration at California State University, Bakersfield and earned a Doctorate Degree in Organizational Leadership at the University of La Verne.
- **Kara Mannix, High School Principal:** Ms. Mannix serves as the High School Principal for the California Connections Academy Schools. Her background in education is diverse, with teaching experience in grades 3–12, and administrative experience at elementary, middle, and high school levels. She began her teaching career with Teach for America, and served as a high school Spanish teacher in rural Louisiana. Upon returning to California, Ms. Mannix taught grade 3 in East Palo Alto. She was a middle school math teacher and later an administrator with KIPP Bay Area Schools, and most recently, served as the Vice Principal in Calistoga at both the high school and elementary level. She earned her Bachelor's degree in Psychology from University of California, Davis and her Master's degree in Educational Psychology from Columbia University.
- **Leslie Dombek, High School Assistant Principal:** Ms. Dombek serves as one of the High School Assistant Principals for the California Connections Academy Schools. She has been part of the school organization for over a decade. She began her teaching career at CalCA SoCal in Southern California in 2005 as an elementary school teacher, teaching grades K–5, and has held several leadership roles within the school, including Master Teacher. She was also previously an Assistant Principal for grades K–8. She earned a Bachelor of Arts degree and her teaching credential from the University of California, Riverside.

- **Scott Ervin, High School Assistant Principal:** Mr. Ervin serves as one of the High School Assistant Principals for the California Connections Academy Schools. Mr. Ervin is a graduate of California State University, Fresno where he earned his Bachelor's degree in English. He earned his teaching credential from Chapman University. His first teaching position was in a self-contained grade 7 class for one year and he then went on to teach high school English for seven years. Mr. Ervin then went back to California State University, Fresno to earn his Master's degree in Educational Leadership and his Administrative credential. After earning his Administrative credential, Mr. Ervin spent three years as an Assistant Principal at the middle school level, before beginning work for California Connections Academy.
- **Lauren Cunningham, High School Assistant Principal:** Ms. Cunningham serves as one of the High School Assistant Principals for California Connections Academy Schools. Ms. Cunningham has been involved in education for over 12 years. She began her teaching career working in the brick and mortar setting as a 2nd and 5th grade teacher in Capistrano Unified School District. She joined California Connections Academy in August of 2008 and taught 3rd grade, including gifted and talented, for nine years. During her time at California Connections Academy, she moved up the positions on the career ladder as a lead, coordinating, and then master teacher. Ms. Cunningham earned two Bachelor's degrees in Psychology and Sociology from University of California, Santa Barbara, her Multiple-Subject Teaching Credential and Reading Certificate from Cal State Fullerton, and is currently working on earning her Master's degree in Educational Leadership from National University.
- **Heather Tamayo, Middle School Principal:** Ms. Tamayo is the Middle School Principal for the California Connections Academy Schools. Prior to joining the organization, Ms. Tamayo spent the previous seven years working at the middle school level with Palm Springs Unified School District. In that time, she worked largely with English Learners of every stage in language acquisition. She found herself in many different roles, her most rewarding one being in the classroom with the students, forming relationships with them and watching them become fluent English speakers. She earned a Bachelor's degree in History from California State University, Long Beach, and a Master's degree in Educational Administration from California State University, San Bernardino, and a Master's degree in Cross-Cultural Education from National University.

- **Tracy Pinckney, Middle School Assistant Principal:** Ms. Pinckney is the Middle School Assistant Principal for the California Connections Academy Schools. She started her career as a High School English and AVID teacher as well as a coach in Fresno. She then transitioned into administration, holding several positions such as Dean of Curriculum and Instruction and Student Activities Director, and then most recently as a High School Assistant Principal for five years in Northern California. She takes great pride in the work she has done helping to implement intervention programs and Professional Learning Communities within her schools. One of the most rewarding aspects of her career so far is working with the AVID program and watching students transform into college students before her eyes. Ms. Pinckney earned her Bachelor's degree in Communications from California State University, Fresno and her Master's degree in Educational Administration from National University.
- **Marcus White, Elementary School Principal:** Mr. White is the Elementary School Principal for the California Connections Academy Schools. He was principal of Burton Elementary School in California's Central Valley for three years where he worked to improve student test scores on the California state tests by 20%. He also led his staff to develop a systematic benchmark testing process and provided software training in data analysis to his staff. Mr. White also served as a Vice Principal for two years and was an elementary classroom teacher for three years. In addition, he coached youth sports for six years. Mr. White earned his Bachelor's degree from Chapman University before earning a teaching credential. He earned a Master's degree in Teaching from Chapman to more effectively drive student achievement.
- **Marissa Carter, Elementary School Assistant Principal:** Ms. Carter is a member of the California Connections Academy Schools' leadership team as the Elementary Assistant Principal. Ms. Carter started her teaching career at a blended school in San Diego County and was hired as a teacher with California Connections Academy Schools in 2009. As a California Connections Academy teacher, Ms. Carter taught grades 4 and 5, taught the PACE (Program for All Children to Excel) program for language arts and math, served as an Elementary Master Teacher, and was the California Connections Academy's Director of State Testing for California Connections Academy Schools. Ms. Carter has been impressed with the opportunities teachers at California Connections Academy Schools have to support students and families on an individual basis, and to form strong relationships with them. Ms. Carter earned her Bachelor's degree in Library Arts from San Diego State University and her Multiple Subject Teaching Credential from National University.

- **Mia Hardy, Director of Counseling Services:** When Ms. Hardy joined the California Connections Academy Schools, she brought extensive school counseling experience at every level: elementary, middle, high school, and post-secondary education. She earned a Master's degree in Educational Counseling and Guidance from California State University, San Bernardino and, in support of her degree, she earned a Pupil Personnel Services (P.P.S.) credential. Ms. Hardy takes proactive therapeutic approaches in order to promote academic, social, and behavior development among all students. She is skilled in working with students of diverse backgrounds, including underrepresented student populations such as African American students, Native American students, and Hispanic/Latino students from elementary school through undergraduate levels of education. She specializes in program planning and implementation, college readiness, and group counseling.
- **Tanya Gustin, Director of Student Services (Special Education/504/English Learners):** Ms. Gustin has worked in the field of Special Education for over 20 years. She started her career as a behavior technician at a non-public school for students with Autism. Ms. Gustin earned a Bachelor's degree from Sacramento State University, and a Master's degree in Special Education from National University. Over the course of her career, Ms. Gustin has held many positions in the Special Education field including paraprofessional, in-home Applied Behavior Analysis tutor, and Special Day Class Teacher for students with Autism from preschool to postsecondary settings. As an administrator, Ms. Gustin served as a Program Specialist at the Special Education Local Plan Area (SELPA) level. In this role, Ms. Gustin worked closely with multiple agencies to create programs for students in her community with special needs, such as the Collaborative Autism Diagnostic Clinic which is associated with the North Bay Regional Center. Ms. Gustin brings a wealth of knowledge on various special education topics, allowing her to provide ongoing trainings at many levels and present at conferences, such as the statewide Association of California School Administrator (ACSA) conference for Special Education. Just prior to joining the staff of California Connections Academy Schools, she was Principal for an alternative small school that provided intensive academic and behavior supports for students with Autism and other social/emotional disorders. Her philosophy of special education is that teaching independence and creating independent learners opens doors and opportunities for all students. She encourages compassion, resiliency, grit and positivity in her staff, colleagues, her students and their families.

- **Dr. Richie Romero, Director of Student Achievement:** Dr. Romero is the Director of Student Achievement for California Connections Academy Schools. Prior to joining the team, he spent 20 years serving communities as a high school science teacher, high school co-administrator, and middle and high school principal. Most recently, Dr. Romero served as the principal of William J. “Pete” Knight High School for three years, a large high school with 3,000 students, 80% of whom receive free or reduced lunch. During his tenure there, Dr. Romero and his team were able to achieve revalidation as an AVID National Demonstration School. In addition, the school’s Career Technical Education academy was recognized by Advance CTE as the best STEM based program in the nation for 2018. Before Knight High School, Dr. Romero was the principal of Keppel Academy Middle School for five years. This is a small rural middle school, also with 80% of its students receiving free or reduced lunch. In 2010, when Dr. Romero arrived, the school was on the brink of state sanctions. In 2015, the school was honored as a Gold Ribbon School. Dr. Romero earned his Bachelor’s degree in Chemistry from the University of California, Irvine. He earned a Master’s degree in Educational Administration from California State University, Bakersfield. Most recently, he earned his doctorate in Organizational Leadership from the University of La Verne. He also currently serves as an adjunct professor for ULV in the Secondary Education Department teaching in the credentialing program.
- **Ashley Silver, Assistant Director of Student Services:** Ms. Silver received her Bachelor’s degree and Master’s degree from California State University, Fullerton. She is beginning her sixth school year at California Connections Academy Schools working in the world of virtual education. Prior to her current role, Ms. Silver worked as an Applied Behavior Analysis (ABA) case manager, special education teacher, and instructional assistant. While at California Connections Academy, Ms. Silver has taught K–8 reading, writing, basic math, and pre-algebra. Ms. Silver was an integral player in co-designing and implementing the school’s inclusion plan for students in grades K–12 in online classrooms. She continues to provide training and mentorship in the area of inclusion to online special educators across the nation.
- **Dr. Frances Sassin, Director of Business Services:** Before joining CalOPS, Dr. Sassin performed financial and compliance consulting work for over ten years for three charter schools, including the California Connections Academy Schools. Dr. Sassin began her professional career as a veterinarian. After becoming a parent, however, she began directing her energy into the field of education and has been working with charter schools for over 18 years. Dr. Sassin was one of the founders of the first start-up charter school in Orange County, and was subsequently employed as the school’s Business and Operations Manager for two and a half years. Dr. Sassin also served several terms on the Board of Directors of that charter, including terms as President and Treasurer. She earned her Bachelor’s degree from the University of California, San Diego and a Doctor of Veterinary Medicine (DVM) degree from the University of California, Davis and continues to provide veterinary services to her community through volunteer activities.

## **I.D OTHER SUPPORT**

- Assisting the Governing Board will be the legal team at **Procopio, Cory, Hargreaves and Savitch, LLP**, a law firm with extensive experience in charter school law. Lead counsel is Greg Moser, Esq. Mr. Moser and the other attorneys at Procopio have many years of experience in public agency law as well as non-profit corporation law. In addition, Mr. Moser is one of the foremost experts in charter school law in the state. He has been a legal advisor to the California Charter Schools Association since its inception. He leads a team of attorneys who specialize in charter school law and who provide expert assistance on a wide variety of matters that affect the school.
- **CliftonLarsonAllen, LLP**: Also providing assistance for the Governing Board is the audit firm of CliftonLarsonAllen. CliftonLarsonAllen employs more than 5,400 people, including more than 700 principals and 2,300 CPAs, in more than 110 locations across the United States. The firm is approved by the California Department of Education to audit charter schools and has extensive experience with non-profit accounting and auditing.
- **Dr. Brian Rosta, Director of Schools**: As the West Coast Director of Schools for Connections Education, Dr. Rosta is assigned by Connections to provide support for virtual schools in California, Nevada, New Mexico, and Colorado. He also served as Principal of Arizona Connections Academy. He has over 20 years of experience in education fulfilling several key roles including teacher, dean, assistant principal, principal, and director. He is a certified teacher in Biology, Chemistry, and Physics. In 1997, Dr. Rosta was named the Best Teacher in the Chicago Public Schools. He previously served as the Initial Director of the International Baccalaureate program for the Chicago Public School System and was the first Principal for the Gilbert Classical Academy (Gilbert, AZ), the model 1:1 Computing School for the State of Arizona. He is also an Adjunct Professor for Grand Canyon University School of Education. Dr. Rosta earned a Bachelor's degree in Secondary Education and a Bachelor's degree in Biological Sciences from DePaul University, a Master's degree in School Administration and Leadership from Northwestern University, and a Doctorate degree in K-12 School Leadership from the University of Florida.
- **Support Agencies**: California Connections Academy Schools are members of both **California Charter School Association (CCSA)** and **Charter School Development Center (CSDC)** and accesses many resources for charter operators from both of these statewide charter support organizations.

## II. EDUCATIONAL PHILOSOPHY AND PROGRAM

### II.A MISSION

*Provide a clear and concise mission statement that defines the purposes and nature of the charter school. Describe here, as well as within other applicable elements of the application, how the charter will improve learning for the targeted population and increase learning opportunities for its students. **This statement should be written for understanding by the charter authorizer and the general public.** [Ref. Criteria for Review; CCR-5, §11967.5.1(f)(1)(B)]*

The mission of CalCA Monterey Coast will be to educate and empower compassionate global citizens by leveraging 21<sup>st</sup> century education resources on behalf of students who need a more personalized approach to learning to maximize these students' potential and meet the highest performance standards. This mission will be accomplished through a uniquely individualized learning program that combines the best in virtual education with real connections among students, family, teachers, and the community to promote academic and emotional success for every learner. Every student will have a Personalized Learning Plan and an entire team of experts committed to the student's successful fulfillment of that plan. CalCA Monterey Coast will be a high-quality, high-tech, high-interaction virtual "school without walls" that brings out the best in every student through Personalized Performance Learning.

### II.B EDUCATIONAL PHILOSOPHY

*Describe the educational program of the proposed charter school:*

- Identify those whom the school is attempting to educate;
- Describe what it means to be an "educated person" in the 21<sup>st</sup> century; and
- Provide the applicant's view of how learning best occurs.

*The goals identified in the educational program must include the objective of enabling students to become self-motivated, competent, and lifelong learners. [Ref. California Education Code §47605 (b)(5)(A)(i)]*

**Definition of Terms and Elements:** CalCA Monterey Coast's instructional methods, educational philosophy, and program will include unique elements provided by Connections through a Statement of Agreement. Connections will provide specific educational products and services, always with the oversight and approval of the Governing Board. The following section provides descriptions of Connections' unique core model elements that explain how the needs of the student population will be met and also explains terminology used throughout this application. Connections has shown that it is always committed to continual improvement. Accordingly, Connections' systems and techniques will be routinely updated to incorporate best practices and lessons learned. Connections will continually improve its offering to ensure the needs of students and families are being met.

- ***Assessment Objective Performance Reports (AOPR):*** These reports provide real-time student performance data on essential skills and standards based upon individual math, language arts, and science assessment items. They identify the objectives students should master by the end of that grade level based upon the California Common Core State Standards as well as the Next Generation Science Standards and display students' performance against the objectives. Data can be sorted to identify students who have or have not mastered specific objectives. Data can be sorted to identify students who have or have not mastered specific objectives. Teachers will use this data to determine which students need more help with a particular objective. They may complete individual or small group tutoring virtually with these students targeting specific skills. Currently, AOPR supports secondary courses.
- ***Collaboration Among Students:*** Using Adobe® Connect™ for LiveLesson sessions, teachers may group students into break-out rooms to facilitate collaboration. Teachers then "visit" each room to observe student collaboration and provide targeted instruction. This audio/video web conferencing tool allows teachers the flexibility to group students, conduct small group instruction, utilize a whiteboard for illustration, and allows students to work together in a collaborative space. Additionally, for each section of students that a teacher teaches in a course, the teacher will create a section message board. On the section message board, teachers assign additional collaboration opportunities or have students work together in the online space to share information, post documents, and respond to one another. Students are graded on both the content of the projects and their participation in collaborative activities.
- ***Curriculum-Based Assessments:*** Teachers use curriculum-based assessments (CBAs), via telephone conversation or through one on one LiveLesson sessions, as a quick and effective way to gather information on students' understanding of concepts. Diagnostic curriculum-based assessments (DCBA) pinpoint strengths and weaknesses in student mastery of concepts. Verification curriculum-based assessments (VCBA) gauge authentic student learning of concepts previously graded as successfully completed with scores of B or higher.
- ***Connexus® Education Management System (EMS):*** Connexus is the platform for organizing the school's entire educational environment. This proprietary, web-based software delivers every assignment and tracks every activity (whether conducted online or offline) while monitoring the completion of individual lessons as well as mastery of discrete skills and knowledge. Connexus operates within a secure, robust technology infrastructure protecting data from loss and intrusion while maintaining a safe environment. Parents and students access Connexus to organize, document, and interact, ensuring an unprecedented level of engagement. All new releases and updates of Connexus are automatically provided.



- ***Longitudinal Evaluation of Academic Progress (LEAP):*** This assessment tool is used for students in grades K–8 as a technology-facilitated pre-, mid-, and posttest. It provides an essential benchmark relative to the student’s grade level standards. This data is used for developing and planning instruction, provides an early read on a student’s performance on state-mandated tests, and reports key accountability data on student progress throughout the academic year. It is expected that the school will use this benchmark assessment for K-8 students. However, benchmark assessments may change as the school progresses through the term of its charter.
- ***Learning Coach:*** Parents or other parent-designated caring adults will serve as Learning Coaches and play an active role in the learning process, providing input, and communicating regularly with teachers. CalCA Monterey Coast will promote this significant role of parents by providing a wide array of resources for parents and multiple avenues for communication. Learning Coaches will complete an online orientation designed to familiarize them with the important role they play in supporting their student as a learner. As part of the California Connections Academy program, the Learning Coach Program Development Team offers supports for Learning Coaches.
- ***LiveLesson Session:*** A real-time, web conferencing tool, LiveLesson sessions will allow teachers to work synchronously and directly with individuals or groups of students using voice-over IP, chat, electronic whiteboard, and shared web surfing based on Adobe® Connect™. LiveLesson sessions can be recorded for students to watch later as well.
- ***Multitiered Instruction:*** The school will employ a multitiered instruction framework based upon the Response to Intervention (RTI) model that deeply links curriculum, standards, assessments, and interventions that have a direct impact on student mastery and resulting standardized test performance. The RTI model targets essential skills/standards by subject/grade level, uses specified assessments within the curriculum to measure student mastery of these skills and standards, provides tiered interventions for non-mastered skills and standards, and then tracks students’ response to the implemented interventions by skill/standard. Through this model every student has access to the resources they need to be successful: Tier I core curriculum with differentiation, Tier II supplemental instructional supports (two to three times per week), and Tier III supplemental instructional supports (four to five times per week). Student Support teams (SST) will meet regularly to develop an intervention plan and strategies for improvement for students who are in need of additional support.
- ***Personalized Performance Learning™ (PPL):*** This instructional process will create a unique learning experience for each student. During enrollment, academic placement advisors and/or School Counselors review students’ past records and performance to properly place them in the school. A Personalized Learning Plan (PLP) then developed collaboratively by the teacher, Learning Coach, and student to maximize achievement and to tailor curriculum and instruction. Throughout the year, teachers monitor students’ progress and adjust their learning programs to focus on areas where students need to improve and areas in which they can build on their strengths.

- **Progression Plan:** Within Connexus, there is a Progression Plan tool which will assist teachers, administrators, and school counselors with the implementation of a plan which defines and tracks requirements and ensures students are on target for graduation, meeting their college and career goals.
- **Scantron Performance Series® (SPS):** Students in grades 9–11 will be assessed with the Scantron Performance Series. The Scantron assessment is a valid and reliable test that measures student proficiency in reading and mathematics and provides a scaled score that can be used to measure academic growth. It therefore serves as a useful tool in assessing student curricular needs. The online test is a computer-adaptive assessment that automatically adjusts to each student’s ability level, generating more difficult questions if the student is answering correctly and easier ones if the student is answering incorrectly. It provides a valid and reliable scale score in math and reading so that student learning growth can be tracked over time. The version that CalCA Monterey Coast will use is aligned with the California Common Core State Standards and provides teachers with reports and information to address individual student needs. It is expected that the school will use this formative assessment for high school students. However, formative assessments may change as the school progresses through the term of its charter.
- **StarTrack™:** This integrated rating system will allow every student, Learning Coach, and teacher to rate each lesson in which they engage from a low of one star to a high of five stars and give detailed feedback. Ratings and comments will be used by the curriculum staff to ensure continuous feedback and to identify areas of needed improvement as well as curriculum approaches that work especially well.
- **Student Status/Escalation Process:** The school will track and report ongoing student progress based on the objective quantitative data generated by Connexus. Staff members will analyze attendance, participation, performance, assessment submissions, and teacher contact. The student status is displayed on the home page for instant identification of potential problem areas. The Escalation Process goes into effect when students are in statuses other than “On-Track” in order to ensure students continue to gain the full benefits of this educational option through this unique school choice.
- **Synchronous Contact:** In a virtual school setting, synchronous contact is defined as a live interaction occurring in real time interaction between teachers and students. This type of communication helps to build a relationship between teachers and students. Teachers will schedule LiveLesson sessions, in addition to other synchronous interaction (e.g., phone calls), for students. Teachers will document all synchronous contact with a student within the student’s Log in Connexus.

- **Teacher:** The school will employ fully qualified, California-credentialed teachers, as required by applicable law, who are also specially trained in online delivery and personalized instruction. Teachers will primarily work remotely to deliver instruction to an online classroom of students and work one-on-one with students through highly interactive, technology-facilitated communication tools. Teachers will maintain a one-on-one relationship with each student.
- **Teacher Feedback Notification:** This feature in Connexus sends auto-generated WebMail notifications to students and their Learning Coaches when teachers enter feedback in all assessments. Automatic WebMail notifications direct students and Learning Coaches to the specific assessments for which the feedback is provided creating a continuous loop of communication on student learning.
- **Teachlet® Tutorials:** Teachlet tutorials are proprietary, interactive, asynchronous graphic/video/audio tutorials, and are incorporated into lessons to provide students a dynamic, fun, and engaging way to learn the concepts they need to master learning objectives and standards.
- **WebMail System:** This proprietary email system is securely located within Connexus. Students, Learning Coaches, and teachers use it to communicate with each other, protecting them from spam, contact from those outside of Connexus, and other mainstream email issues.

### What is an “educated person” in the 21st century?

Children in the 21<sup>st</sup> century must become literate and articulate, mathematically competent, scientifically and technologically adept, and have the opportunity to develop their creative and physical abilities. CalCA Monterey Coast recognizes its responsibility to generate enthusiasm and excitement for the lifelong process of learning by providing a curriculum that is relevant, integrated, and age-appropriate, and at the same time aligned to California Common Core State Standards.

Students, including many who have not thrived in the traditional classroom, will engage in a challenging learning program tailored to their individual needs and focused on equipping them for success in the 21<sup>st</sup> century. The curriculum and instructional programs will fulfill all of the frameworks put forth by the Partnership for 21<sup>st</sup> Century Learning<sup>9</sup> which are:

- **Mastery of key subjects:** Students will master the key subjects which include English, reading/language arts; world languages; arts; mathematics; economics; science; geography; history; and government and civics.

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<sup>9</sup> The Partnership for 21<sup>st</sup> Century Skills, “Framework for 21<sup>st</sup> Century Learning,” May 2015, <http://www.p21.org>

- **Incorporation of 21<sup>st</sup> century interdisciplinary themes into academic content:** The curriculum will incorporate global awareness; financial, economic, business and entrepreneurial literacy; civic literacy; health literacy; and environmental literacy.
- **Use 21<sup>st</sup> century tools to develop learning and innovation skills:** As the Partnership recommends, students will develop proficiency in creativity and innovation; critical thinking and problem solving; and communication and collaboration.
- **Use 21<sup>st</sup> century tools to develop information, media, and technology skills:** Students will develop information literacy; media literacy; information, communication, and technology literacy.
- **Students will develop life and career skills:** Students will develop adequate life and career skills, including flexibility and adaptability; initiative and self-direction; social and cross-cultural skills; productivity and accountability; and leadership and responsibility.
- **Use 21<sup>st</sup> century support systems to ensure student mastery of 21 century skills:** 21st century standards, assessments, curriculum, instruction, professional development and learning environments will be aligned to produce a support system that produces 21st century outcomes for today's students.

The individualized and supported educational program facilitates the development of self-direction and personal responsibility among its students. In these ways, CalCA Monterey Coast will meet the objective of producing students who are self-motivated, competent, lifelong learners.

#### **How does learning best occur?**

Children learn best in a safe, positive environment in which they are respected, accepted, valued and nurtured as unique individuals and are challenged to achieve their full potential.

From this, it follows that students learn best when the instruction is tailored to their unique needs and when they are supported by adults who are committed to their success.

### Personalized Learning Plan

The centerpiece of instruction at CalCA Monterey Coast will be the Personalized Learning Plan (PLP) which provides for individualized instruction tailored to the learning needs of each student. The PLP is an extensive document that will be developed by the California-credentialed teacher in consultation with the student and the student's Learning Coach (usually the parents/guardians). The PLP will be built from a combination of baseline assessments of both academic skills/knowledge and learning modalities, information gathered from the Learning Coach, and input directly from the student. Learning needs that go beyond the purely academic (such as study habits and interpersonal skills) are addressed in the PLP as well. The PLP then guides the student's course through the California Common Core State Standards-based Connections curriculum. All daily lessons will be provided to students and families online. Learning Coach Guides will be provided digitally for grades K-5. Lessons direct students step-by-step through use of the comprehensive set of textbooks, trade books, manipulatives, and consumables that are shipped to them or provided online (see Exhibit A for examples of a PLP).

### Key Facets of Instructional Model

An individualized and supported educational program facilitates the development of self-direction and personal responsibility among its students. CalCA Monterey Coast will implement the Connections instructional model which incorporates key facets such as 1) the Learning Triad (teachers, Learning Coaches, and curriculum); 2) Counseling Support; and 3) Student Motivation.

- 1) **The Learning Triad:** The Connections instructional model relies on the support of a) fully qualified teachers, b) supportive Learning Coaches, and c) a high-quality, standards-aligned curriculum. The Learning Triad, consisting of these three elements, is illustrated in

- 3) Figure 13. Each student will have a staff of experts, including California-certified teachers, working together to leverage the school's myriad resources —technological, instructional, and interpersonal —for success. Learning Coaches are also encouraged to, and typically function as, an integral part of the student's learning team.
- a. **Fully Qualified Teachers** —Student learning benefits from committed educators who, in collaboration with parents, provide total support. Each student will have certified California teachers specially trained in teaching in an online environment, the Connections curriculum, and specific instructional methods. In each of the elementary grade levels or secondary level core subjects, students will be taught by a certified teacher with expertise in a particular grade level or content area. Teachers will work closely with each student on a one-on-one basis using innovative technology tools. The teacher will be responsible for teaching, evaluating assignments and work products, providing instructional assistance, assigning and scoring assessment activities, and providing feedback on the student's performance. Based on a student's demonstrated mastery of the material, teachers will add, expand, or replace assignments; they will also grade students in each subject for the Grade Book, and make promotion or retention decisions. Depending on the needs of the learner, teacher direct contact —via telephone, LiveLesson session, and/or WebMail —with the student and Learning Coach may be as frequent as several times a day, and at minimum twice per month. Teachers view the student's attendance, participation, and performance on a daily basis via the Connexus teacher's home page. Teachers will not wait to be contacted; they will be proactive participants in their students' learning plans. Teachers in virtual schools often comment that they understand their students better in the virtual environment than in a traditional classroom since they work with students one-on-one.

Figure 13. Learning Triad

# OUR LEARNING TRIAD

## TEACHERS

personalize lessons, evaluate student progress, provide feedback and assistance, and encourage students. Periodically, teachers facilitate real-time virtual sessions to provide targeted support based on student learning.

## CURRICULUM

delivers engaging, interactive content; multimedia tools; and superb resources. It also provides teachers with continuous information on student progress.



conneXus®

is the technology that makes online learning possible. Students and Learning Coaches use the platform to connect with teachers, curriculum, and a wide range of resources.



## LEARNING COACHES

typically support and motivate students and monitor schedules. Parents/Learning Coaches are also encouraged to communicate and collaborate with teachers.

## STUDENTS

explore, create, and learn from home, accessing curriculum and resources via the internet. Students can contact teachers for assistance by WebMail or phone.



- b) Supportive Learning Coaches** — Each student will have a Learning Coach who is encouraged to work in person with the student. Typically, a Learning Coach helps keep students motivated and on track and regularly communicates with the students' California-certified teachers. At the high school level, the Learning Coach is less involved with daily instruction but is encouraged to continue serving as an important supervisory role for the student.
- c) A high quality, standards-aligned curriculum** — The Connections curriculum is aligned to the California Common Core State Standards and Next Generation Science Standards. The developmentally appropriate curriculum increases its integration of technology as students advance through the grades.
- 4) Counseling Support:** Students are assigned a credentialed school counselor who provides an extra layer of monitoring for the whole student. This educator, in collaboration with the Learning Coach, develops progression plans for high school students, and closely tracks students' overall academic progress. Counselors work with students via the phone, WebMail, and LiveLesson sessions to help students overcome nonacademic barriers to learning and to create and implement postsecondary plans. Student academic progress can be tracked on a daily basis via online discussions, quizzes, tests, science labs, and portfolio items to ascertain mastery of the material. Other parameters of student success, such as attendance and participation, are also tracked regularly. School counselors can also provide support in nonacademic areas, such as social-emotional support, to help ensure student success. Counseling support is available to students in grades K-8 on a referral and/or consultative basis. For students in middle school, an Advisory teacher is assigned who develops the PLP and then monitors student progress and attendance regularly. At the elementary level, the student's primary teacher is known as the homeroom teacher and fulfills these responsibilities in addition to their role in instruction in core subject areas.
- 5) Student Motivation<sup>10</sup>:** Teachers are trained to apply three engagement strategies to their instruction to create a motivational online learning environment: 1) making instruction fun and engaging, 2) providing a safe way to respond, and 3) helping students succeed.
- **Make Instruction Fun and Engaging:** Teachers are trained to make synchronous learning sessions fun and engaging by using games, music, and virtual collaboration tools (e.g., virtual whiteboard, polls, and breakout rooms).

<sup>10</sup> <http://www.connectionsacademy.com/blog/posts/2015-02-11/The-Fundamentals-of-Online-Classroom-Motivation.aspx>



- **Provide a Safe Way to Respond:** Teachers are shown how to create a welcoming and safe online environment where students can feel free to express their ideas and needs without being judged. The more comfortable the student feels, the more productive and engaged he or she will be.
- **Help Students Succeed:** It is incredibly rewarding for teachers to witness their students succeed! They know firsthand how gratified a student feels when he or she grasps a challenging concept or subject, or does well on an assignment. Celebrating student success and achievement increases student motivation.

### Asynchronous Model with Synchronous Support

CalCA Monterey Coast plans to utilize the Connections program which provides an asynchronous model that uses synchronous support.<sup>11</sup> In synchronous learning, students and teachers work together at the same time in the same virtual place (e.g., LiveLesson sessions). Typical synchronous instruction involves teacher-facilitated lessons, targeted small group lessons to teach difficult concepts, group projects, and class discussions. In asynchronous learning, students work at their own pace and place, completing coursework within defined time limits. Students and instructors are not necessarily interacting in real time. Schoolwork that students perform on their own time typically includes:

- Viewing pre-recorded online classroom sessions at home,
- Reviewing course materials online or offline,
- Completing lessons and course assessments, and
- Collaborating with other students via secure message and discussion boards.

Some students thrive with one-on-one attention while others crave the space to work through problems independently at their own pace. Offering a combination of the two learning approaches allows virtual schools to create a more personalized learning experience that supports different learning styles.

There are many benefits to asynchronous learning. Through asynchronous instruction and materials, students are provided the flexibility to:

- Learn at their own pace, place, and peak times, unconstrained by schedules of others;
- Work at their own level, moving as quickly or slowly through course materials as needed;
- Review difficult materials as often as needed; and

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<sup>11</sup> <http://www.connectionsacademy.com/blog/posts/2014-09-26/Real-Time-or-Anytime-Learning-Synchronous-and-Asynchronous-Learning-Explained.aspx>

- Explore resources that may be unavailable in the traditional classroom.

There are also several benefits to synchronous learning. Interactivity is the key to synchronous instruction allowing:

- Students to demonstrate their knowledge and practice their communication skills;
- Students to ask questions to deepen their understanding;
- Students to build relationships with their teacher and fellow classmates;
- Teachers to engage students in discussions, problem solving, and group projects;
- Teachers to focus class time on bridging skills gaps; and
- Teachers to build one-on-one relationships with students.

Teachers will record class discussions and instructional sessions as asynchronous materials to reinforce learning or accommodate student scheduling conflicts. Together, these two approaches provide teachers and students the best of real-time and any-time learning.

### Learning Coaches

Parents/guardians or other parent-designated caring adults will serve as Learning Coaches and play an active role in the learning process, providing input, and communicating regularly with teachers. CalCA Monterey Coast will promote the significant role of parents by providing a wide array of resources for parents and multiple avenues for communication. Learning Coaches will complete an online orientation designed to familiarize them with the important role they play in supporting their student as a learner. As part of the California Connections Academy program, the Learning Coach Program Development Team offers supports for Learning Coaches.

- **Get Started!** - Enrolling with a new school raises many questions—Get Started! offers both assistance and reassurance by providing extensive information about online education. The program helps families prepare for a successful school year through such resources as the Learning Coach Central website, teacher welcome calls, an orientation course for Learning Coaches, in-person orientation gatherings, and the Learning Coach Success Series.
  - **Learning Coach Success Series Onboarding Sessions** – To prepare for their new role as Learning Coach and the school year, new Learning Coaches can “Get Started” by participating in this onboarding series of live, webinar-style sessions. In addition to open Q&A sessions, this series helps families plan, organize, and gain confidence as they prepare for their first days of school. Sessions include *Virtual School Basics*, *Getting Ready for the First Day*, *First Days: What to Expect*, and *Beyond the First Days: Tips for Success*.

- **Get Coaching!** The program is dedicated to the ongoing support of Learning Coaches by helping them understand their role, providing them with easy access to resources, and ensuring that they are equipped with the tools and strategies needed to motivate and assist their students.
  - **Learning Coach Central** – This award-winning website, accessed from the Learning Coach Home Page in Connexus, provides multiple resource documents, tutorials, video Quick Clips, and helpful links that support Learning Coaches in their role and providing instructional support to their student.
  - **Learning Coach Link** – This online monthly communication is sent to Learning Coaches with articles on instructional best practices, Connexus updates, tips and strategies, and information about upcoming Learning Coach Success Series sessions.
  - **Learning Coach Success Series** – These online sessions are designed to not only support new Learning Coaches through our Get Started! program, but also provide strategies for all Learning Coaches to work with and support their students. Sample session topics include the curriculum, online clubs and activities, motivation, learning principals, college and career, and the exceptional learner.
- **Get Connected!** - This program assists students and parents who are interested in finding opportunities to connect with other school families. In addition to in-person field trips and online clubs and activities, this program offers socialization tips for online school families, increased opportunities for students to interact online with classmates and teachers, and private Facebook groups where parents and Learning Coaches can “meet” to arrange study groups and other informal gatherings.

In addition to the online training and resources offered to Learning Coaches, CalCA Monterey Coast will have staff members, known as Family Relationship Specialists, dedicated to working directly with Learning Coaches and providing additional support to Learning Coaches who may be struggling with some aspect of the program.

## **II.C HIGH SCHOOL PROGRAMS**

*If the proposed school will serve high school students (any of grades nine through twelve), the petition must describe how the school will inform parents about the transferability of courses to other public high schools and the eligibility of courses to meet college entrance requirements. [Ref. California Education Code, §47605(b)(5)(A)(iii)]*

As required by law, CalCA Monterey Coast will notify parents annually, via the School Handbook (See Exhibit B), of the transferability of courses to other high schools as well as the eligibility of courses to meet college entrance requirements.

Since CalCA Monterey Coast expects to be accredited by WASC, all of its high school courses will be considered transferable to other California high schools. Once accredited, CalCA Monterey Coast then expects to be approved by the University of California Office of the President following the extensive process for online and independent study programs. CalCA Monterey Coast anticipates receiving “a-g” approval for the majority of the high school course list, offering more than 100 courses in all core content areas, including electives, which are already approved through the Connections course provider approval process.

Most courses are also approved through the National Collegiate Athletic Association (NCAA) through a rigorous approval process to meet requirements for initial-eligibility for college athletes. NCAA Eligibility Center has certified more than 80 of the Connections high school core and elective courses as meeting NCAA Eligibility Center requirements. Because the school plans to work with Connections and follow the Connections Academy instructional model, it would be able to be included in the Connections Academy “district” with the NCAA, and therefore would be able to offer these courses to its student athletes.<sup>12</sup>

The NCAA Eligibility Center approves courses in the areas of language arts, math, science, social studies, and electives that are needed to meet NCAA graduation requirements (a total of 16 core courses are required).

## **II.D STUDENTS TO BE SERVED**

*Identify the proposed charter school’s target student population, including, at a minimum, grade levels, approximate numbers of students, and specific educational interests, backgrounds, or challenges. [Ref. California Education Code §47605 (b)(5)(A)(i) and Criteria for Review; CCR-5, §11967.5.1(f)(1)(A)]*

CalCA Monterey Coast’s virtual educational model will serve students in grades K–12 who reside throughout Santa Cruz county and the adjacent (contiguous) counties of San Mateo, San Benito, Santa Clara and Monterey. Enrollment for the start of the 2019-20 school year is expected to be about 200 students, and the school plans to continue to grow steadily but responsibly in subsequent years. Enrollment targets notwithstanding, CalCA Monterey Coast will make every effort to serve as many students as possible who apply.

<sup>12</sup> <https://www.connectionsacademy.com/Portals/4/ca/documents/pdfs/NCAA-Approved-Course-List-CA-POBL-iNACA-2017-18-FINAL-082817.pdf>

CalCA Monterey Coast addresses a growing need for students to be educated outside of traditional brick-and-mortar schools. This need is substantiated by the dramatic growth of charter schools and other alternative educational programs including non-classroom based schools in California. There are many reasons why students seek education outside of traditional brick-and-mortar schools: they may be gifted and need very challenging curriculum and faster pacing; be struggling academically; be homebound; be grappling with social, discipline, and/or other issues; or they may be elite athletes or performers needing flexible scheduling for education.

Since its model has broad appeal among mainstream California families — and yet offers a very different learning experience for those already exploring the virtual charter option — CalCA Monterey Coast’s demographics will typically mirror both the region’s and state’s school-age population. CalCA Monterey Coast expects to have a similar student population as the other CalCA schools.

CalCA Monterey Coast’s families will include many of modest means (the school anticipates that approximately 40% would meet the federal income guidelines for free- or reduced-price meal benefits) as well as single parent/dual-working parent households who participate in this program. For more information about tracking demographic data, see Section VI.B.

## **II.E CURRICULUM AND INSTRUCTIONAL DESIGN**

*Include a framework for instructional design that is aligned with the needs of the pupils that the charter school has identified as its target student population. Describe the basic learning environment (e.g., site-based matriculation, independent study, technology-based education). Discuss how the chosen instructional approach will enable the school’s students to achieve the objectives specified in the charter and master the academic content standards in core curriculum areas as adopted by the State Board of Education pursuant to Education Code Section 60605. The discussion of instructional design should include, but not be limited to, curriculum, teaching methods, materials, and technology. [Ref. Ref. California Education Code §47605 (b)(5)(A)(i) and Criteria for Review; CCR-5, §11967.5.1(f)(1)(C-E)]*

CalCA Monterey Coast’s instructional model will be built upon the core components of the Personalized Performance Learning (PPL) Model. The three primary components are:

- 1) Parent involvement,
- 2) Individualized instruction, and
- 3) High-quality teaching.

CalCA Monterey Coast will provide a learning environment that is well-supported by both the Learning Triad and by a sophisticated technology component. This basic foundation will be further enhanced by a proven curriculum, a focus on high-quality teaching, and ongoing staff training and professional development opportunities.

### Supporting Research for the Personalized Performance Learning Model

Support for the need to expose students to online learning is evident in the 2015 article, *The Effectiveness of Online Learning: Beyond No Significant Difference and Future Horizons*, when Tuan Nguyen states “.... about 92% of all distance and online education studies find that distance and online education is at least as effective, if not better, than traditional education.”<sup>13</sup>

**High-quality Teaching:** Teachers will be equipped with skills and technology to maximize student learning. Research, focusing on online learning, echoes the critical importance of teacher quality and preparation. In November 2015, Mary F. Rice, Theron (Bill) East and Daryl F. Mellard published a study (*Teacher Preparation and Promising Practices in Online Learning*<sup>14</sup>) which analyzed effective teacher preparation and practice for the online learning environment. In the study, “...administrators indicated teacher preparation and ongoing support (e.g., coaching and professional development) was very critical. In fact, they agreed this topic was one of the most critical of all topics covered in the forum. Administrators considered teacher preparation and support very important because they believed that teachers are the most important component of successful online learning once devices are in students’ hands and working properly.”

Through an award-winning Professional Learning model,<sup>15</sup> teachers will gain an understanding of their role as facilitator, distinguish changes to the online environment and its impact on student learning, and adapt to those changes while transitioning to their role as an online instructor at CalCA Monterey Coast. Throughout each level of professional learning, teachers engage in reflection opportunities and share their reflections with colleagues and school leaders. According to Rick DuFour and Douglas Reeves in their article, *Professional Learning Communities Still Work (If Done Right)* (October 2015),<sup>16</sup> educators “...prefer professional development that helps them plan and improve their instruction, is teacher-driven, includes hands-on strategies relevant to their classrooms, is sustained over time, and recognizes that teachers are professionals with valuable insights.” Teachers are most satisfied when they are part of a learning community focusing on lesson planning, using data to personalize instruction, designing engaging content, and ensuring that all curriculum is aligned to state and national standards.

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<sup>13</sup> Nguyen, Tuan (2015). “The Effectiveness of Online Learning: Beyond No Significant Difference and Future Horizons,” MERLOT Journal of Online Learning and Teaching, 11(2). [http://jolt.merlot.org/Vol11no2/Nguyen\\_0615.pdf](http://jolt.merlot.org/Vol11no2/Nguyen_0615.pdf)

<sup>14</sup> [http://centerononlinelearning.org/wp-content/uploads/Superintendent\\_Topic\\_7\\_Summary\\_November2015.pdf](http://centerononlinelearning.org/wp-content/uploads/Superintendent_Topic_7_Summary_November2015.pdf)

<sup>15</sup> In April 2015, the Connections Professional Development Model was recognized with a silver award for Best Practices for Distance Learning Programming by the United States Distance Learning Association (USDLA). In May 2016 Connections was recognized as a Codie Award finalist for Best Professional Learning Solution for K-20 Faculty and Administrative Staff.

<sup>16</sup> <http://www.edweek.org/tm/articles/2015/10/02/professional-learning-communities-still-work-if-done.html>

**Timely and Actionable Feedback:** The unique ability of an online teacher to communicate one-on-one with students and offer timely and actionable feedback is key to student success in an online learning environment. According to a 2014 study,<sup>17</sup> 77% of students view face-to-face comments as “very” or “extremely effective.” Whether the teaching is online or face-to-face, as described in this study, feedback is a critical element in supporting student learning. Professional learning topics delve deeply into ways that teachers can reach students individually at CalCA Monterey Coast, so that students are receiving timely and actionable feedback. Teachers at CalCA Monterey Coast will use collaboration in professional learning to discuss topics such as “...the main purpose of feedback is to improve the student's ability to perform tasks he or she has not yet attempted...In other words, we need to start from where the learner is, not where we would like the learner to be. We need to use the information we obtain from looking at the student's work—even though that information may be less than perfect—and give feedback that will move the student's learning forward.”<sup>18</sup> In his 2012 article, *Seven Keys to Effective Feedback*, Grant Wiggins notes, helpful feedback is goal-referenced; tangible and transparent; actionable; user-friendly (specific and personalized); timely; ongoing; and consistent.”<sup>19</sup> These qualities and instructional strategies are characteristic of the type of feedback that teachers will provide to students.

**Personalized Instruction:** Students clearly benefit from instruction that is personalized in terms of pace, content, sequence, and style. In a study published in 2016,<sup>20</sup> students in a developmental math class experienced between a 13% and 27% increase in course completion using personalized learning in a digital platform. Robert Marzano and Michael D. Toth explain that “Within classrooms, there should be ample evidence of students wrestling with new content as they build the stamina required to reach higher levels of thinking. Without the opportunity to struggle with a problem or decision, for instance, students may attain surface-level knowledge of a concept, but be unable to utilize that knowledge in meaningful ways.”<sup>21</sup> A goal of personalization via online instruction is for the student to demonstrate increased content knowledge and critical thinking. Instruction is personalized for every student, every day, and professional learning supports teachers in implementing instructional practices that maximize student performance. Students will work together on collaborative projects as well.

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<sup>17</sup> Turnitin.com (2014). Instructor Feedback Writ Large: Student Perceptions on Effective Feedback

<sup>18</sup> <http://www.ascd.org/publications/books/111001/chapters/Setting-Objectives-and-Providing-Feedback.aspx>

<sup>19</sup> <http://www.ascd.org/publications/educational-leadership/sept12/vol70/num01/Seven-Keys-to-Effective-Feedback.aspx>

<sup>20</sup> “Using personalized learning, a developmental math professor increases her course passing rate”. Website blog. Pearson Education Blog. Pearson Education, 2016.

<sup>21</sup> [www.marzanocenter.com/files/Teaching-for-Rigor-20140318.pdf](http://www.marzanocenter.com/files/Teaching-for-Rigor-20140318.pdf)



**Data-Driven Instruction:** Research on data-driven decision making states “...educators should consult and factor in multiple sources and types of student data to get a more complete view of student progress or achievement. These additional sources of data may be formal (e.g., chapter tests, class projects, or performance assessments) or informal (e.g., class discussions, homework assignments, or formative assessments). Looking at a broader array of data can help teachers avoid putting too much weight on a single measure of student performance and, therefore, reduce the risk of making inaccurate and invalid decisions about student learning and teaching effectiveness.”<sup>22</sup> Training and professional development will guide teachers through this process helps ensure teachers are comfortable with the importance of using data to personalize instruction. At CalCA Monterey Coast, teachers will be provided tools and clear guidance on how to analyze and use student performance data to provide targeted instruction, intervention, lesson modifications, remediation, and enrichment.

**Parent Involvement:** According to the 2015 study *Parent and Student Perceptions of Parent Engagement at a Cyber Charter High School*,<sup>23</sup> Borup and Stevens identify five primary types of parental engagement: nurturing relationships and interactions (with both their students and the teachers); advising and mentoring; organizing; monitoring and motivating; and instructing. The study also provides several examples of how parent engagement can be enhanced in a virtual school setting, especially when parents are given the additional tools to help reinforce the engagement. CalCA Monterey Coast will provide Learning Coaches with tools (e.g., orientations, tutorials, synchronous webinar-type sessions, recordings, and more) to better engage with their students. Based on the intimate knowledge parents have of their students, they will be better able to offer their students a continuum of assistance, as needed in varying degrees, and be more strategic in how to help and engage with them.<sup>24</sup>

### Curriculum and Instructional Design Principles

The research-based<sup>25</sup> curriculum which will be adopted by CalCA Monterey Coast will use the following proven instructional principles:

- Curriculum fosters breadth and depth of understanding in subject areas.
- Content is aligned to the California Common Core State Standards, and the Next Generation Science Standards.
- Curriculum is supported by quality, reputable, recently published textbooks and/or proven instructional resources and materials.

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<sup>22</sup> Mertler, Craig A. Introduction to Data-Driven Educational Decision Making (2014), [http://www.ascd.org/publications/books/sf114082/chapters/Introduction\\_to\\_Data-Driven\\_Educational\\_Decision\\_Making.aspx](http://www.ascd.org/publications/books/sf114082/chapters/Introduction_to_Data-Driven_Educational_Decision_Making.aspx)

<sup>23</sup> <http://files.eric.ed.gov/fulltext/EJ1085792.pdf>

<sup>24</sup> Borup, J. & Stevens, M.A. (2015). Parent and Student Perceptions of Parent Engagement at a Cyber Charter High School, Online Learning, Volume 19, Issue 5, pp. 75-83.

<sup>25</sup> American Psychological Association’s Learner-Centered Psychological Principles: A Framework for School Reform and Redesign <http://www.apa.org/ed/governance/bea/learner-centered.pdf>

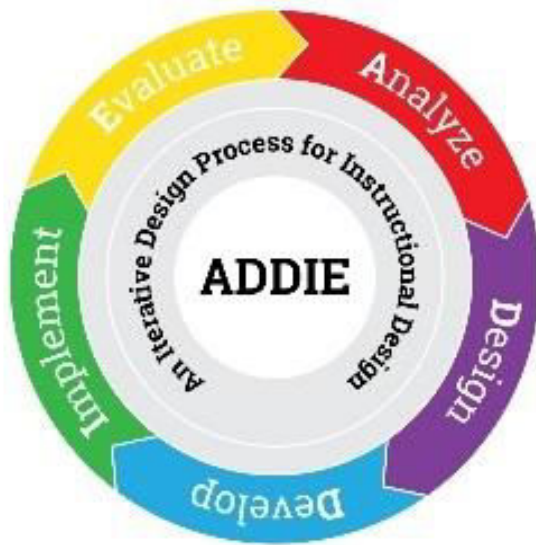


- Content and assessments are accurate and unbiased.
- Content is current, relevant, and provides real-world applications.
- Content is appropriate for the learner (age, ability, background, reading level, style).
- Instructional design is adaptable and flexible to meet individual needs.
- Instructional design provides students opportunities to improve learning skills using technology (virtual labs and instruments, Teachlet tutorials, business software, online calculator).
- Navigation is intuitive and age-appropriate.
- Scope of course is appropriate with regard to amount of content, length of course and lessons, and course requirements.
- Lesson introduction is effective and presents lesson objectives, accesses prior knowledge, sets expectations, and motivates.
- Background information prepares students to access new content, skills, and strategies.
- Curriculum includes opportunities for developing problem-solving and critical thinking skills and real-world applications, collaboration and independent study, and developing oral and written communication skills.
- Curriculum incorporates ongoing formative assessment and provides timely and appropriate feedback to students and teachers.
- Curriculum promotes active learning through interactive elements in each course (including online and/or offline interaction) that address diverse learning styles and preferences, including textual, visual, auditory, and/or hands-on.

### Curriculum Development Framework

ADDIE, a five-phase iterative curriculum development model consisting of Analysis, Design, Development, Implementation, and Evaluation is used to guide and inform curriculum development and maintenance as shown in Figure 14.

Figure 14. ADDIE – Curriculum Development Framework



In ADDIE, each step has an outcome that feeds into the next step in the sequence.

- *Analysis* – During analysis, the curriculum team identifies the goals and objectives, the audience's needs, existing knowledge, and any other relevant characteristics. This step also considers the learning environment, any constraints, the delivery options, and the timeline for the project.
- *Design* – During this systematic process of specifying learning objectives, detailed storyboards and prototypes are often made and the look and feel, graphic design, user-interface, and content are determined.
- *Development* – In this step, production and actual creation of the content, assessments, and learning materials based on the Design phase occurs. A backwards-mapping content design approach is used which includes the identification of key assessed concepts followed by the development of units, lessons, and activities that support student mastery of these concepts.
- *Implementation* – During implementation, the plan is put into action and a procedure for training the learner and teacher is developed. Materials are delivered or distributed to the student group. After delivery, the effectiveness of the training materials is evaluated.
- *Evaluation* – This phase consists of (1) formative and (2) summative evaluation. Formative evaluation is present in each stage of the ADDIE process. Summative evaluation consists of tests designed for criterion-related referenced items and providing opportunities for feedback from the users. Revisions are made as necessary.

The curriculum and instructional design is in close keeping with leading research and national standards on effective online instruction. The research underscores the importance of integration of tools for student-to-teacher and student-to-student interaction and the central role of fully qualified, specially trained professional teachers.<sup>26</sup> In addition, the National Standards for Quality Online Teaching<sup>27</sup> focus on teacher use of assessments, data, and ongoing communication to bring out the best in each unique online learner.

The curriculum and instructional design accommodates the range of learning styles and is designed for individualized pacing, balanced with optimum interaction. The rigorous program includes both fundamental skills and higher-order thinking, which together prepare students for further education as well as lifelong, independent learning.

Input from students, parents, and teachers will be gathered on an ongoing basis via StarTrack for lessons. On every lesson in the curriculum, and on the home page for each Learning Coach, will be a StarTrack box inviting ratings on a five-star scale and an opportunity to provide text feedback. Data gathered from this feedback will be examined carefully and acted upon by school staff and by Connections. Since the StarTrack tool was launched, parents and students in schools supported by Connections have provided millions of lesson ratings. For the 2017-18 school year, 1,017,974 lesson ratings were submitted by parents and students attending schools supported by Connections Academy, with an average rating of 4.31 out of 5 stars.

### Overview of Curriculum, Technology, and Materials

CalCA Monterey Coast will combine proven and rigorous educational content and materials with the best in technology-enhanced learning such that a significant portion of the curriculum is delivered through the Internet and other electronic means. The curriculum is aligned with California Common Core State Standards, and Next Generation Science Standards. In addition to initial development of state standards alignment by the Connections curriculum specialists, the teaching staff at CalCA Monterey Coast will collaborate on an ongoing basis to review the California Common Core State Standards for each core course (as applicable) and provide additional material or lessons to fully meet standards or address areas that need additional support based on a student's previous school or course performance.

The curriculum is updated regularly, based on a rigorous analysis of student performance on state standards as measured by state testing results and internal assessments. The Governing Board will annually review and approve the major elements of and changes to the curriculum. The curriculum as described herein represents the most recent curriculum developed for the 2017-18 school year.

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<sup>26</sup> Smith, Rosina, Clark, Tom, and Blomeyer, Robert, *A Synthesis of New Research on K-12 Online Learning*, Learning Point Associates/North Central Regional Educational Laboratory; Naperville, IL; 2005 at [https://www.researchgate.net/publication/304827914\\_A\\_Synthesis\\_of\\_New\\_Research\\_on\\_K-12\\_Online\\_Learning](https://www.researchgate.net/publication/304827914_A_Synthesis_of_New_Research_on_K-12_Online_Learning)

<sup>27</sup> The National Standards for Quality Online Teaching v2, International Association for K-12 Online Learning (iNACOL), <https://www.inacol.org/resource/inacol-national-standards-for-quality-online-teaching-v2/> October 2011.

## Elementary and Middle School Curriculum

The program of instruction for students in grades K–8 has the ability to be individualized, personalized, and delivered in a non-traditional environment to give students the best pathways to success. The high-quality proprietary curriculum integrates textbooks, instructional activities, and other content from a variety of leading publishers. In addition to high-quality virtual and print textbook resources, the curriculum features technology-based content. The school uses a variety of multimedia and interactive practices to reinforce standards for language arts and math at each grade level. The proprietary and highly effective online Teachlet tutorials, which introduce challenging topics and provide interactive practice, are also included along with proprietary interactive online tools and simulations. Depending on grade level, these may include a virtual rock and mineral kit, pan balance, geoboard, and interactive math practice activities. LiveLesson sessions provide for real-time direct instruction with individual and small groups of students using voice-over IP, chat, electronic whiteboard, and shared web surfing. These sessions allow teachers and students to interact with one another in real time in an online classroom. In addition, LiveLesson sessions may be recorded and saved for students to revisit at a later date if they had scheduling conflicts or want to refresh themselves on the topics covered.

CalCA Monterey Coast will focus on developing and nurturing a culture of math acceptance and empowerment. With a focus on student engagement and learning, activities and practices combine to create an awareness of and appreciation for math in the students' everyday lives; make math more approachable for students, parents, and teachers; build pride and confidence in math effort and achievements; and make math connections with college and career planning. Specific activities include student reflection and goal setting activities in math courses, certificates of effort and achievement, parent resource sessions, teacher training sessions, and highlighting math connections in everyday school and life activities.

World language instruction will be available, including Spanish, Chinese, and Sign Language for students in grades K–8. Advanced middle school students will also have the option to take high school level Spanish, French, German, Japanese, Latin, American Sign Language, and Mandarin Chinese. Language courses integrate proven-effective online materials with a unique audio recording tool that allows teachers to hear and grade actual student speech. Courses may also include LiveLesson session direct instruction for maximum student-to-teacher and student-to-student interaction.

The curriculum also will include unique electives such as Home Life which provides fun, hands-on, skill-building projects in which the whole family can participate. These activities include cooking, crafts, sewing, home maintenance, family outings, and genealogy. Home Life modules have been added periodically, including such additions as The Name of the Game: Discovering and Designing Board Games; What It Means to Be Green: Creating a Positive Impact on the Environment; Model Bridge Building; and Orienteering (navigation with map and compass).

Educational Technology courses will be available for students in grades K–8. These courses provide not only a comprehensive set of technology skills ranging from basic productivity tools to web page development, but also reinforce national and state academic standards, online study skills, and Internet safety.

A popular elective amongst elementary school students is music. Available for different grade and experience levels, this elective is aligned to the National Core Arts Standards. With audio, visual, and interactive technologies, the K–8 music courses provide a unique and advanced learning experience. Students use critical listening skills to analyze music while participating in interactive experiences. This elective expands the student's knowledge of the foundations of music.

### **Gifted and Talented Courses (Grades 3-8)**

CalCA Monterey Coast will also offer a selection of Gifted and Talented (GATE) courses in math, science, and language arts. With individualized lessons, special GATE courses, and specialized teachers, an environment is created where talents are nurtured and potential is realized. The gifted and talented experts also create programs for "twice-exceptional" students, those who are gifted but also have special education needs.

CalCA Monterey Coast will provide gifted students the opportunities and challenges they need to be successful while learning at their own pace. GATE courses incorporate the same educational standards as the standard offering, but also include enrichment activities that expand upon lesson topics and promote higher-level thinking and understanding. These courses allow students greater opportunities to interact with the teacher and other students, explore above grade-level content, and participate in extension projects that promote higher-level learning.

### **High School Curriculum**

CalCA Monterey Coast will provide a balanced, challenging high school experience focused on students pursuing paths that lead to success, whether via college, vocational studies, or an immediate career choice. A student's personalized path is monitored along the way by the student, parents, teachers, and the school counselor as appropriate.

CalCA Monterey Coast plans to provide a comprehensive program with four levels of academic coursework: Foundations, Standard, Honors, and Advanced Placement. While all levels are designed to meet standards and provide students rigorous courses, the different levels enable differentiation based on student needs and college and career goals. Students work with their school counselor to determine proper course level placement. The high school curriculum currently consists of approximately 250 courses, including a wide variety of electives and intensive world language instruction from Spanish to Mandarin Chinese.

High school courses integrate digital versions of textbooks from major publishers with enhanced multimedia, interactive materials and resources, discussions, and communication/conferencing tools. In addition, students have offline assignments, projects, and practice work.

High school courses include extensive use of Teachlet tutorials, the highly interactive, asynchronous tutorials that incorporate graphics, video, and audio to engage students with the concepts and ideas they need to complete the lessons. Along with the use of LiveLesson sessions, Teachlet tutorials increase the effectiveness of the secondary school instructional model. In addition, the high school courses incorporate graded asynchronous online discussions. This assessment creates important opportunities for collaboration and interaction among students, increases writing skills, and provides opportunities for a “real-world” audience.

Honors and Advanced Placement® (AP) courses are also available for high school students. High school students will have access to rigorous college preparatory courses and are able to choose from dozens of Honors courses and more than 15 College Board–approved online AP courses. By enrolling in these demanding college-level courses, students demonstrate their commitment to higher education, which may give them a competitive advantage during the college application process.

The high school program will also include a host of services and procedures to address credits, transcripts, and counseling. It is important for students to start early on planning for graduation and post-secondary education or the world of work. Without early planning, students run the risk of missing crucial courses that might thwart their plans or aspirations.

### Course Selection and Credit Transfer

CalCA Monterey Coast expects to be accredited by the WASC, allowing its courses to be transferable among other California schools. For students transferring into CalCA Monterey Coast, school counselors will carefully analyze student transcripts and educational history to provide the maximum allowable “transfer credit” into the program. Upon graduation or withdrawal, students will receive their CalCA Monterey Coast transcript detailing both the credits earned at CalCA Monterey Coast as well as any transfer credits which have been verified. The curriculum uses a standard whereby one credit equals approximately 180 hours of instruction (this is equivalent to a full-year course in a traditional high school and is sometimes also referred to as Carnegie Units).

CalCA Monterey Coast families will have access to a detailed Course Selection Guide with specific school information during the enrollment process. Parents and students then have an opportunity to select the courses based on their student’s academic level, previously completed high school level courses, and plans for higher education and/or career. These selections are analyzed along with the student’s prior academic record by the school counselors who will then either accept these selections or recommend some modifications.



### **Instructional Delivery and Scheduling**

CalCA Monterey Coast students who enroll in the K–8 program and elect to continue into high school will notice that the high school introduces increased structure and a pacing system that encourages all the students in a single class to move forward at a similar speed. The high school program includes a significant amount of computer-facilitated learning. While hardcopy textbooks are provided in some courses (generally along with an enhanced online version of the text as well), students may also take several courses that are completely online. Unlike the K–8 program which is largely asynchronous/user scheduled (parents set the schedule and lessons can be done in any sequence and pace), in high school the pacing for core courses may follow an asynchronous/fixed schedule (the schedule is fixed and students all move at a similar pace). This does not take away the ability of teachers to personalize the curriculum for students; however, it does add accountability, structure, and significant peer interaction that is necessary for a quality high school program.

### **Area and Subject Requirements**

Each CalCA Monterey Coast student must successfully complete a minimum of 22 credits in order to graduate. Credits completed will meet or exceed the California graduation requirements. The subject area graduation requirements will be reviewed annually to ensure the school remains in compliance with state requirements, and the requirements will also be approved by the Governing Board and incorporated into the School Handbook.

### **Promotion, Graduation, and Passing Grades**

Students in grades 9–12 will typically be enrolled in at least five credits over the course of the school year, as the CalCA Monterey Coast program is a full-time public school program (see the School Handbook Supplement in Exhibit B for more information.) A typical high school student will have six courses or the equivalent of six credits per academic year. To stay on track for graduation in four years, prior to grade 10, students should have earned (or transferred) a minimum of 5 credits, prior to grade 11 students should have earned (or transferred) a minimum of 10 total credits and prior to grade 12 students should have earned (or transferred) a minimum of 16 total credits. Students only receive credit for classes passed with a grade of “D” or better. To graduate and receive a diploma from CalCA Monterey Coast, a student will need to be enrolled during the semester immediately prior to graduation, must have earned a minimum number of credits at CalCA Monterey Coast, and must have met any applicable state requirements for a diploma. Each student should successfully complete a minimum of 22 credits to graduate.

These enrollment and promotion policies, including additional details and any future changes, will be incorporated into the School Handbook and approved by the Governing Board.

## Technology and Socialization

In addition to working with the curriculum materials, students will have the opportunity to participate regularly in both face-to-face and virtual community activities. Face-to-face activities include field trips, college tours, and community outings facilitated by both CalCA Monterey Coast faculty and parent volunteers such as Club Orange members. Club Orange brings together parents of students attending schools supported by Connections across the country. Club Orange members are encouraged to reach out to engage with their local communities.

The counseling team implements weekly national LiveLesson sessions for high school students focused on academic achievement, personal/social growth and college and career readiness topics throughout the school year. These are also currently offered twice monthly for middle school students. Nationally, several other college and career readiness-focused LiveLesson sessions are offered; there is always time before and after for socialization via chat pods.

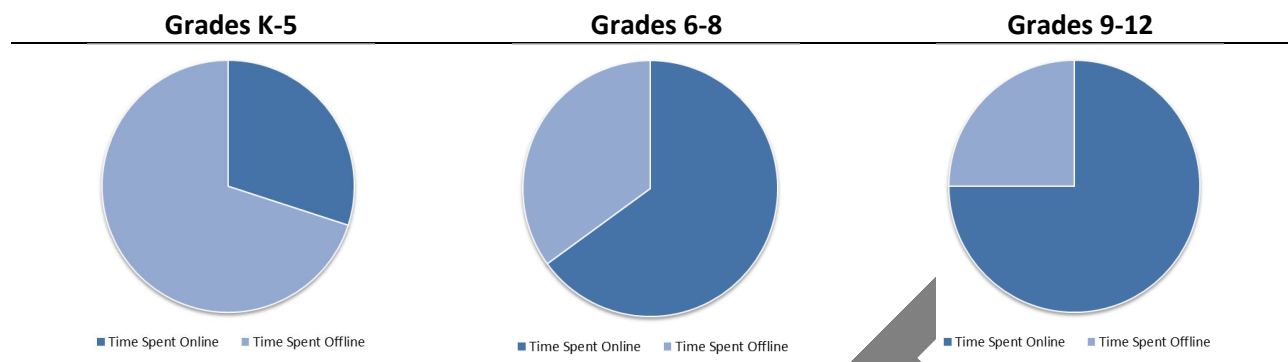
CalCA Monterey Coast's technology-based activities include online bulletin boards/forums (such as "Math Problem of the Week"); book chats; teacher-led small group discussions using real-time "groupware" technology that integrates electronic whiteboard and voice-over IP; learning-focused WebMail; and student communication through WebMail regarding virtual group projects. All of the collaborative online activities and communications tools are restricted for use only by members of the CalCA community; parents can feel comfortable that their children are experiencing this technology safely within the protected environment of CalCA Monterey Coast.

The Get Connected! program (as described in Section II B) was developed to assist students and parents who are interested in finding opportunities to connect with other school families. In addition to in-person field trips and online clubs and activities, this program offers socialization tips for virtual school families, increased opportunities for students to interact online with classmates and teachers, the Club Orange parent booster organization, and private Facebook groups where parents and Learning Coaches can "meet" to arrange study groups and other informal gatherings.

Given the balance of modes and media for learning at CalCA Monterey Coast, actual time spent working online for students varies according to each student's developmental level, learning needs, and learning styles. As illustrated in Figure 15, students in grades K–5 may spend 15-30% of their school day online; students in grades 6–8 may spend about 50-75% of their school day online; and students in grades 9–12 may spend 75+% of time online.



Figure 15. Time Spent Online by Grade Span



### Clubs and Activities

As an integral part of the academic program, students will also be offered access to a wide range of national clubs and activities throughout the school year. From Arts and Crafts to Debate Club, CalCA Monterey Coast will have something to spark every student's interest at all grade levels. Participation in these virtual clubs and activities enhances students' feeling of connectedness, provides socialization opportunities, and improves academic achievement and school retention rates. All clubs and activities are non-credit and have no impact on student grades.

Students who participate in clubs are involved in events similar to a brick-and-mortar school such as First in Math, chess matches, a student-managed blog, guest speakers, and college and career planning. Some of the clubs last throughout the school year, while others act as special "pop-up" events that range in duration and subject matter.

The following provides a sampling\* of some of the clubs California Connections Academy Schools currently offer:

- **Art Club** is designed to spark a student's creativity by exploring two-dimensional and three-dimensional art, photography, and graphic design through techniques and styles associated with each medium. Students will have the opportunity to create original designs and artwork, share their artwork with peers, learn about appropriate critique guidelines, and provide feedback to other club members. (Grades: 6–12)
- **Arts and Crafts** encourages students to create crafts using materials found at home and in nature. Through the topics of culture, science, and math, students will work on projects from the course as well as monthly special craft challenges. (Grades: K–8)
- **Author's Corner** students have the opportunity to create and share original stories in LiveLesson sessions and on the Message board. Students can also collaborate on the message boards to give critiques of student writing, create round robin stories, and discuss favorite book genres. (Grades: K–12)

- **Brainteasers Club** members will solve puzzles, including anagrams, riddles, and word scrambles to work their brain muscles too. Students are also encouraged to create their own brainteasers and share them on message boards and in student-made publications. (Grades: K–12)
- **Career Club** encourages middle and high school students to learn about potential careers and explore fields that interest them. Members identify and develop skills that will help them be successful in middle school, high school, college, and professionally. The club enables middle school students to enter high school with more direction in mind, making them more likely to embrace and succeed in a high school program that prepares them for pursuing their career interests. It will allow high school students to better focus on their goals after high school, including applying to appropriate colleges or applying for jobs which align with their interests and goals. (Grades: 6–12)
- **Chess Clubs: Introduction and Advanced** members learn, socialize, and play in an atmosphere of friendly competition using an exclusive gaming site. After completing a tutorial, students are matched with competitors of the same skill level, and the online games begin. There are also monthly presentations by a Grandmaster from the University of Maryland, Baltimore County in our advanced club, and an end-of-year tournament for all skill levels. (Grades: K–12)
- **College Planning Club** is designed for high school students who are considering college. Members are guided through the college preparation and admissions process including: college planning, building and producing a resume, identifying career interests and potential majors, researching colleges, completing applications and identifying financial aid and scholarship opportunities. Members develop a portfolio that focuses on elements sought by college admissions committees. (Grades: 9–12)
- **Debate Club** members will learn best practices and put them into practice during LiveLesson sessions. Members will learn the art of public speaking and critical thinking while working in collaborative teams. Research, reasoning, and understanding opposing perspectives form the foundation for real time debates. (Grades: 6–12)
- **ePals** is a classic way to build friendships. Students develop their skills in letter or WebMail writing and written expression, and, in some cases, penmanship while making friends with other students across the country. (Grades: K–12)
- **Gaming and Technology Club** allows students who have an affinity for technology and gaming to explore and discuss gaming styles and genres, careers in the gaming and technology industry, and share their original work in LiveLesson sessions. Individual and collaborative projects may include creating elements of video games and investigating Internet safety and virtual threats. (Grades: 6–12)
- **Math Club I** members will take part in a math competition by playing interactive games on the First in Math website. The online play reinforces a wide range of skills, from simple addition to solving for x- and y-variables. Students work at their own pace, and earn points as they master various concepts and practice test-prep exercises geared to appropriate grade levels. (Grades: K–8)

- **The *Monitor: Student Blog*** is Connections' student-managed, student-staffed blog. The writers and editors work together to write and organize content for sections of the newspaper including news, entertainment, sports, and advice. (Grades: 6–12)
- **Poetry Corner** allows middle and high school writers to work together in exploring the language of poetry. Regular forums are held to share and critique work. Students also have the opportunity to share and collaborate on various Message Board threads. (Grades: 6–12)
- **Robotics Club** members will learn how robots are used in popular culture, scientific studies, and commercial enterprises. Their creativity is encouraged as they plan, design, and submit drawings of their ultimate robots. No previous computer coding experience is required, and no materials are required for participation. (Grades: K–12)
- **Science Sleuths: Weird Science** is for elementary students who want to investigate the weirder side of science. Students complete hands-on activities that will amaze. Club members can also collaborate through discussions and sharing experiment results on the message boards. (Grades: K–5)
- **Science Sleuths: Wild Weather** is for elementary students who want to investigate weather's wild side. Students will complete hands-on weather experiments and learn how to prepare in emergencies. Club members can also collaborate through discussions and sharing results on the message board. (Grades: K–5)

\*Specific club offerings are subject to change.

Other available activities include an online yearbook organized through Connections, in which all students from all schools are encouraged to participate. Additionally, CalCA Monterey Coast students will also be able to participate in the established chapters of both National Honor Society and National Junior Honor Society.

### Connexus, the Education Management System

Connexus will be the platform for organizing the entire educational environment. It is an online Education Management System developed by Connections specifically for virtual school use. This proprietary, web-based software will allow CalCA Monterey Coast to deliver every assignment, track every activity, and monitor the completion of individual lessons, as well as mastery of discrete skills and knowledge.

Connexus will operate within Connections' secure and robust technology infrastructure which protects all data from loss and intrusion while maintaining a safe environment in which students, parents, and teachers can interact with each other. Connexus is proprietary software developed by Connections. The software is based on Microsoft's .Net Framework and is written in C#. Connections will provide Connexus on an Active Server Page (ASP) basis – hosting the software, automatically installing all updates, and ensuring continuously updated support.

Connexus will be fine-tuned on a regular basis throughout the school year with a comprehensive update each year prior to the beginning of school.

Connexus has been engineered for growth, flexibility, and scalability. The system has readily accommodated growth both nationally and internationally in student enrollment from its launch in 2002. Additional hardware and software extensions are added as required so that the system does not have any restrictions on its ability to serve added users.

Connexus will be available 24/7/365 (except for normal off-hour scheduled maintenance periods) to CalCA Monterey Coast students and their families and to other authorized users according to their permissions. With this system, CalCA Monterey Coast will provide an unprecedented level of time-on-task detail while benefiting from robust communication, collaboration, and course delivery tools.

### California-Credentialed Teachers

Each student will be assigned at least one California-credentialed program teacher specially trained in the curriculum and instructional methods. In the secondary grades, each student will typically be assigned to more than one fully qualified subject teacher depending on the courses taken. These teachers will be responsible for evaluating assignments and work products, providing instructional assistance, assigning and scoring assessment activities in the program, and providing feedback on the child's performance. Based on a student's demonstrated mastery of the material, teachers can add, expand, or replace assignments; they also grade students in each subject for the student report cards and make promotion or retention decisions.

Depending on the needs of the learner, teacher contact with the student and Learning Coach — most often via telephone or email — may be as frequent as several times a day and at minimum once every two weeks. Teachers do not wait to be contacted; they are proactive participants in their student's learning plans. Teachers also interact with students during synchronous Live Lessons, field trips, community activities and during proctored test sessions. CalCA Monterey Coast will also have California-credentialed special education teachers on staff to assist in the implementation of the school's special education program.

Supporting the program teachers in their work will be Connections curriculum specialists, who are highly trained in online instruction methodologies and the best practices in online curriculum development. In addition to the regular curriculum specialists, Connections will provide specialists who are credentialed in special education and can serve as resources for program teachers as they develop/adjust IEPs for students with disabilities in the CalCA Monterey Coast program. Curriculum specialists will be available by telephone, email, and instant messaging to the CalCA Monterey Coast teachers during regular school hours for assistance in addressing particular curriculum topics or in customizing curriculum for particular student needs.

### School Day, School Calendar, and Instructional Minutes

CalCA Monterey Coast will follow a traditional school year calendar that includes 180 days during which instruction is provided by school staff (surpassing the current minimum requirement of 175 days). The curriculum is notably rigorous, and the time commitment it requires of students is comparable to that of a traditional school day. Since learners do not face the distractions and interruptions of a typical school setting — from lining up in the hallway to waiting out the teacher’s handling of disruptive peers — they may use their learning time much more efficiently.

The in-depth application of concepts that is often relegated to homework in a conventional school setting will be an integrated part of the learning day; discrete skills and extended projects, remedial and enrichment activities will all be part of the daily routine for students and their Learning Coaches. The program will provide for and offers more than the legally mandated minimum instructional minutes for every grade.

### Independent Study

CalCA Monterey Coast will adhere to all applicable California Independent Study Regulations in accordance with CCR Title 5, Sections 11700-11705. This includes creating and executing Master Agreements (see Exhibit C for a sample Master Agreement), creating and adopting Governing Board policies regarding independent study, appropriately maintaining work products, and staffing that complies with the required pupil to teacher ratios and compliance with the geographic limitations on the place of residence of the pupils. In addition, CalCA Monterey Coast will comply with California Education Code provisions regarding Independent Study, including section 51747.3, and therefore does not provide any “thing of value” to pupils that a school district could not legally provide to its pupils.

### II.F PLAN FOR STUDENTS WHO ARE ACADEMICALLY LOW-ACHIEVING

*Indicate how the charter school will identify and respond to the needs of students who are not achieving at or above expected levels. [Ref. Criteria for Review; CCR-5, §11967.5.1(f)(1)(F)]*

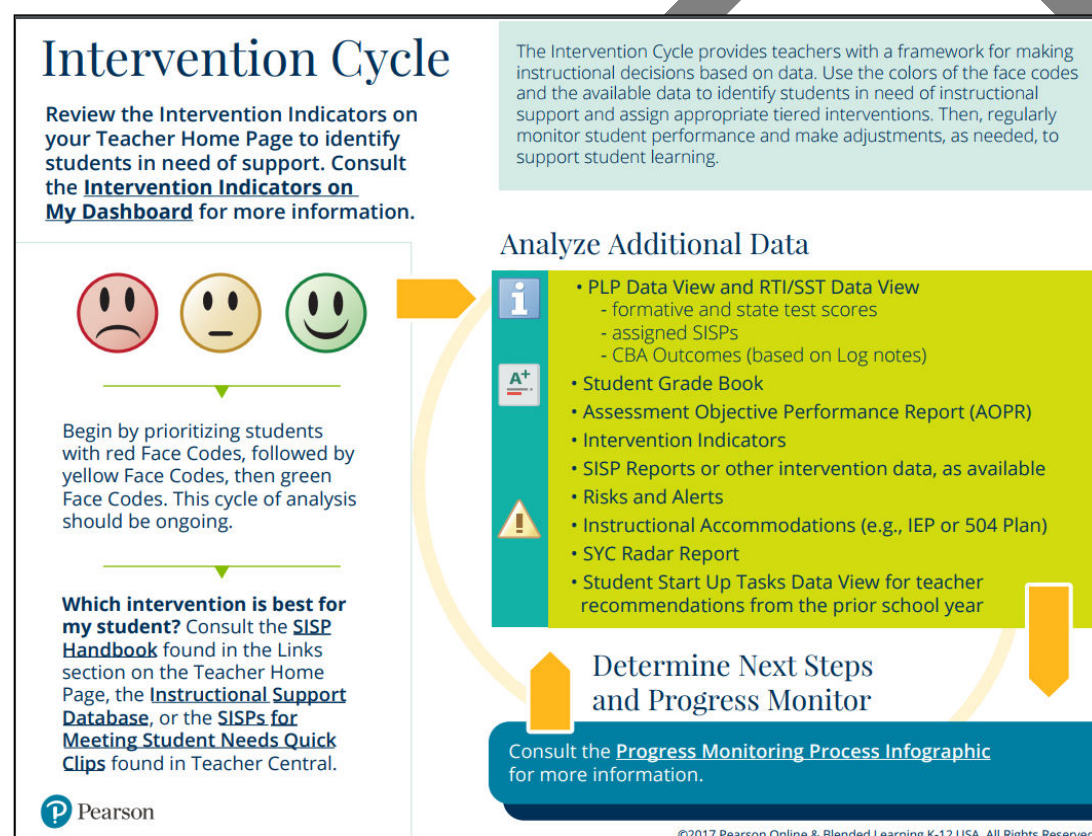
CalCA Monterey Coast will be well-equipped to respond to the needs of students who are lagging academically. Experience has shown that appropriate placement is critical for student success in an online environment so that academic gaps can be addressed immediately. Therefore, the first step is the placement process, where these students are provided with the curriculum materials and teaching resources appropriate to their achievement level as a starting point for learning, with the goal of attaining at least one year’s academic progress within the school year.

Teachers will also implement a Response to Intervention (RTI) Model, a systematic approach to instruction, ensuring that all students receive the necessary level of instructional and behavioral supports throughout the learning process. This model is described in more detail below.

## Intervention Indicators

A key component of the RTI Model will be the incorporation of Intervention Indicators. Intervention Indicators are displayed in Connexus, on the Teacher Home Page, to facilitate a teacher's identification of students who may be in need of additional instruction or intervention in math, reading, or both. These indicators are data-driven codes and are the first step of multi-tiered instruction. The indicators facilitate teachers' abilities to ensure that all students learn at high levels of achievement. Intervention Indicator codes are used to identify students who may be at-risk of failure, assist teachers in determining and implementing appropriate instructional interventions, and monitor the effectiveness of interventions. Figure 16 illustrates the Intervention Cycle and explains the "face codes" used to communicate a student's status. The Intervention Indicator face codes are updated during each school year, based on formative pre, mid, and post assessments.

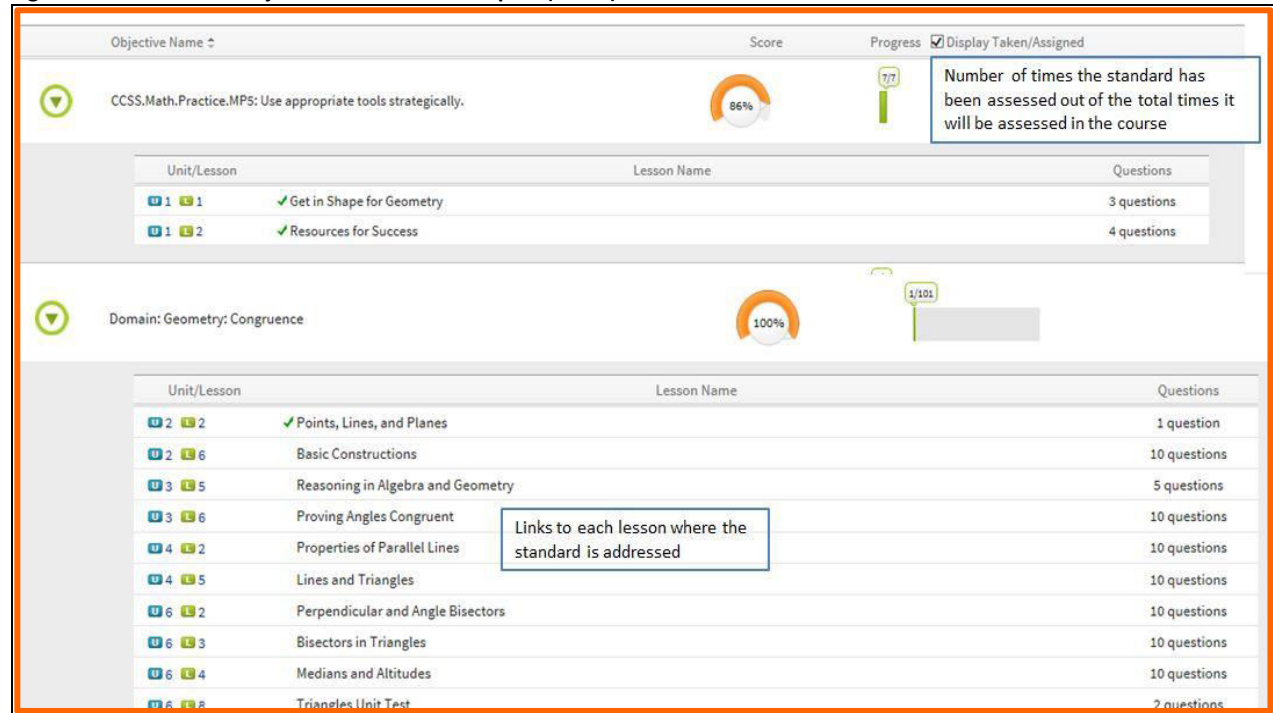
Figure 16. Intervention Cycle



In addition, at both the section and individual student levels for students in grades 6-12, Assessment Objective Performance Reports (AOPR), as shown in Figure 17, can be generated displaying not only the essential skills and standards for a course but also exactly where in the curriculum each of these is assessed and how a student is performing on the standards. Real-time student performance on each of the essential skills and standards is displayed based upon individual assessment items that measure standards-based objectives that students should master by the end of that grade level. Data can be sorted to identify students who have mastered or not mastered specific objectives. Teachers can run this report as frequently as they like to see exactly how students are progressing with regard to each of the skills and standards for that subject and grade. This method accomplishes the following:

- Enhances the multi-tiered instruction model through the use of real-time data to determine mastery/proficiency,
- Identifies essential skills and standards by subject/grade level,
- Identifies how and where these essential skills and standards are assessed within the program,
- Incorporates data-driven decisions throughout instruction,
- Maximizes use of the instructional support programs, resources, and data,
- Identifies the need for tiered interventions for non-mastered/proficient skills and standards, and
- Identifies students' response to the implemented interventions.



**Figure 17. Assessment Objective Performance Report (AOPR)**

Students who are working below grade level based on performance on state standardized assessments will also benefit from intervention programs that focus on building proficiency in reading and math skills. Parents will be notified if their students qualify for these programs, and their cooperation is secured for a series of intensive LiveLesson sessions with the student and their teacher focusing on areas needing improvement. The student will continue in the regular curriculum while receiving intervention as the LiveLesson sessions allow for focused remediation on topics likely to be problematic on the next state standardized assessment.

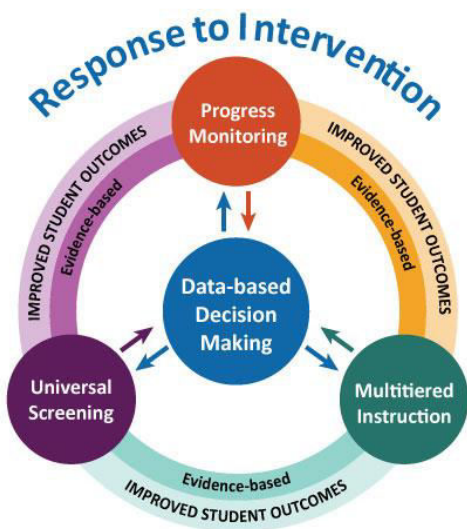
### Response to Intervention (RTI)

CalCA Monterey Coast will utilize a multi-tiered intervention approach, in alignment with an RTI framework, which ensures individual students receive the support they need. Data will be used throughout the school year to implement this model. Students who are struggling with the curriculum will be identified by teachers and provided Tier I support (differentiation within the core curriculum), Tier II interventions (more intensive instruction with frequent progress monitoring), or Tier III interventions and support (most intensive and frequent level of instructional support). The provision of Tier II and III interventions will be decisions made in the cooperation with the school's Student Support Team (SST). This team typically consists of the student's teacher, RTI specialist(s), administrator(s), and parent(s) (when possible). The SST meets regularly, with the frequency based on student need, to evaluate student progress and make additional recommendations. If the SST determines the student is in need of Tier III support, a special education teacher will become part of the team to assist with interpreting data, making recommendations, and possibly recommending a referral for an assessment.



The SST is part of the RTI process that is illustrated in Figure 18. Connexus will provide teachers with real-time data and reports to implement a multi-tiered instruction model in language arts and/or math so that every student has access to the resources they need to be successful using Tier I Core Curriculum with Differentiation, Tier II Supplemental Instructional Supports, and Tier III Supplemental Instructional Supports with increased frequency and intensity. The process of identifying student intervention needs, assigning interventions, tracking their success, and communicating with parents, is ongoing. All efforts are made to meet each student's needs within the general education program.

Figure 18. Response to Intervention







### Making Assessment Data Actionable

Intervention Indicators, located in the My Dashboard area of the Teacher Home Page, will use student performance on state tests and diagnostic assessments to predict the likelihood of learning success during the school year. Codes are displayed to facilitate teachers' ability to identify which of their students may be in need of additional support. A sample of the visual information available for the Intervention Indicators is provided in Figures 19 and 20.



Figure 21 provides an explanation of codes teachers see in the Intervention Indicator display.

**Figure 21. Explanation of Codes**

The face and number codes listed in the Multitiered Intervention section indicate the following information:			
Math and Reading Proficiency (Levels of Need)		Math and Reading: Current Tier/Intervention	
	Based on math and/or reading scores on formative and/or state tests, student is not likely to be at-risk or in need of additional support.	–	The student's teacher(s) has not checked a box in the PLP Data View indicating the student <u>is progressing</u> as expected, nor assigned any tiered interventions.
	Based on math and/or reading scores on formative and/or state tests, student is likely in need of attention.	1	A teacher has indicated "Student is progressing as expected" in the PLP Data View based on current student performance and need. <b>For students with Green Faces, a 1 will automatically be assigned in the PLP Data View.</b>
	Based on math and/or reading scores on formative or state tests, student is in need of additional support.	2	A teacher has indicated "Tier II Math/ELAR Intervention Assigned" in the PLP Data View (or RTI/SST Data View).
	Arrows or a dash reflect formative assessment changes from pretest to midtest to posttest.	3	A teacher has indicated "Tier III Math/ELAR Intervention Assigned" in the PLP Data View (or RTI/SST Data View).
*M: –/R: –	Student has no formative or state test scores. Review all available data to determine whether additional support is needed within the student's first 30 days.	3*	The student has an active IEP and is receiving services for Math/ELAR (as documented in the Special Education Data View). "Student is on an active IEP" will automatically populate in the PLP and RTI/SST Data Views.
N/A	Student is in a Connections Learning™ program.		

\*If M: –/R: – is displayed for a student who has no pretest, midtest, posttest, state scores, teachers will see Not Eligible for Determination in the student's PLP Data View (Performance & Intervention Data Staff Only area).  
NOTE: If either state or formative assessment data is missing, the face code will only reflect the available data.

In a virtual environment, students working below grade level are shielded from the negative social attention that struggling students often face in a brick-and-mortar environment and are thus able to concentrate on intensive learning. Taking advantage of the leadership team's experience in remediation for mastery of essential skills, CalCA Monterey Coast will have access to all needed data and expertise in addressing the needs of low-achieving students.

## **II.G PLAN FOR STUDENTS WHO ARE ACADEMICALLY HIGH-ACHIEVING**

*Indicate how the charter school will identify and respond to the needs of students who are academically high achieving. [Ref. Criteria for Review; CCR-5, §11967.5.1(f)(1)(G)]*

Just as the personalized learning approach benefits struggling students, high achievers will also thrive at CalCA Monterey Coast. High achievers may include students working above grade level, or those who have been identified as gifted at their previous school, or they may be identified by their teachers due to high scores on standardized test and/or a high GPA. CalCA Monterey Coast will implement a robust Connections Gifted and Talented program for students in grades 3-8 and offer Honors and Advanced Placement (AP) options for high school students.

Gifted and Talented (GATE) courses will be offered in math, science, and language arts. Honors and AP courses will be offered across all subject areas. With individualized lessons, special courses for gifted and talented students, and specialized teachers - an environment is created where talents are nurtured and student potential is realized. The gifted and talented experts also create programs for "twice-exceptional" students, those who are gifted but also have special education needs.

The placement process will provide gifted learners with the most appropriate curriculum, pacing, and teaching approach from day one. Teachers will work closely with curriculum specialists and Learning Coaches to ensure a steady flow of enrichment activities for students working above grade level. In a virtual environment, students are able to work significantly above grade level without fear of ostracism or other negative social repercussions that gifted students sometimes face in a more traditional school setting.

The Gifted and Talented program will provide gifted students in grades 3–8 the opportunities and challenges they need to be successful while learning at their own pace. Students will be identified as gifted through formal evaluation in the areas of intellectual ability, subject matter aptitude/achievement, creativity/divergent thinking, and problem solving/critical thinking. Once identified, students will be provided the services necessary for the fulfillment of their exceptional potentials. The Gifted and Talented program will incorporate the same educational standards as the standard offering but also includes enrichment activities that expand upon lesson topics and promote higher-level thinking and understanding. Gifted learners will be grouped together and given opportunities for group interaction through LiveLesson sessions.

The Gifted and Talented program will offer a great level of flexibility, as gifted students may be placed in different curriculum levels for different subjects to support a specific need. For example, a sixth grader with a high aptitude in math could be placed in Gifted and Talented Math 6 where students engage in eighth grade math content, while continuing to take sixth grade level courses in other subjects.

CalCA Monterey Coast will also offer an exclusive online version of Junior Great Books® where students enjoy age-appropriate works and participate in online literary shared inquiry as well as discussions with other high-ability students. In addition, students are able to choose from a wide variety of electives and club activities to supplement their learning. For students identified as highly gifted through formal evaluation, whole grade acceleration, and acceleration in individual subjects may also be considered.

The high school program will offer a rigorous college preparatory curriculum that provides an opportunity for students to enroll in Honors/AP courses. High school students may choose from dozens of Honors/AP courses. Honors courses offer advanced students opportunities to participate in extension projects, investigations, and activities that require integrated skills application and higher-level thinking. Counselors carefully review each student's transcript to determine when an Honors or AP course is appropriate. Course selection is made in close consultation with students and their parents. Administrators monitor the success of intellectually gifted students by reviewing and assessing performance on state assessments, internal assessments, AP exams, ACT/SAT, and by tracking college applications and acceptances of high school seniors.

## **II.H PLAN FOR ENGLISH LEARNERS**

*Indicate how the charter school will identify and respond to the needs of English Learners. [Ref. Criteria for Review; CCR-5, §11967.5.1(f)(1)(G)]*

CalCA Monterey Coast will use state-required criteria and procedures to identify English Learner (EL) students. All incoming students will be required to fill out the California Home Language Survey. Based on the information in this form, students may be referred for further language testing to identify their specific level of English proficiency. The testing and placement occurs using tests required by California (such as the English Language Proficiency Assessments for California (ELPAC)) using trained test administrators. CalCA Monterey Coast also reviews the past school history for evidence that a student has been identified as EL in a previous school, and then conducts assessments and provides support accordingly.

In a virtual school, students with special learning needs, including English Learners, enjoy individualized instruction without being isolated from the mainstream curriculum or their peers. The individualized pace of the program allows students to move more quickly through subjects where language is less of a factor and spend more time on reading and writing activities. An EL specialist with ESL/LEP/EL training will work with CalCA Monterey Coast teachers, Learning Coaches, and students to adapt the core material for EL students. The instructional framework, known as the Sheltered Instruction Observation Protocol (SIOP) framework is used to instruct ELs, and EL teachers also provide appropriate supplemental resources, including various technologies that can facilitate language acquisition while supporting academic advancement.

The California Connections Academy Schools offer credit bearing courses for EL students in high school, to further assist the older EL students, including students categorized at Long Term English Learners (LTELE), to be reclassified as fluent in English while earning high school credit.

The Connections curriculum provides quality instructional, social, and academic language instruction based on scientific research for English acquisition. Children who are becoming fluent in English, as well as Long-Term English Learners, are simultaneously learning academic content, so that they are not left behind. Based on their identified level of proficiency and needs, students receive a planned program of English as a Second Language instruction (ESL) to facilitate the acquisition of English language skills and provide an instructional program appropriate to the student's developmental and instructional level.

To meet the needs of EL students with less English speaking proficiency, CalCA Monterey Coast will deploy a comprehensive instructional approach, including adapted materials as well as special training for teachers with California ESL endorsement (CLAD/BCLAD). The team of EL teachers will regularly attend internal and external trainings and workshops to further their understanding of EL instruction and curriculum, and also participate in a special PLC that focuses on support for EL students.

LiveLesson sessions will be used in this effort as well. The program will provide specially designed academic instruction in English (SDAIE) to address the language acquisition needs of students in a virtual learning environment through the integration of technology and the support of credentialed teachers. Instructional support helps students attain proficiency in listening, speaking, reading, and writing. Services will include teacher consultation with Learning Coaches to guide instructional practice, teacher modification of content lessons and/or assessments, and direct instruction via LiveLesson sessions.

The school will have policies in place for determining when an EL student should be considered for re-designation as fluent in English. This consideration will happen throughout the school year as students enroll and are evaluated. Multiple factors will be taken into account, including current language testing results, academic performance, state test results, teacher feedback, and parental input. Once the student has been re-designated as fluent, the student will be closely monitored for two years, and additional supports will be provided as deemed necessary. For example, for re-designated elementary grade students, the school's EL team will pay particular attention to students flagged for Tier II and Tier III interventions. For re-designated students in middle school and high school, the EL team will pay particular attention to the list of students who are in "escalation" status.

CalCA Monterey Coast will conduct the required ongoing assessments of progress regarding English proficiency for its EL students. All mandated state tests for EL students will be administered as required by law. Support for families of EL students will include coordinating written translations of school documents or an interpreter to act as a liaison between the school and the family in their home language when needed.



## **II.I PLAN FOR SPECIAL EDUCATION**

*Indicate how the charter school will identify and respond to the needs of students with disabilities. Fully describe the charter school's special education plan, including, but not limited to, the following:*

- *The means by which the charter school will comply with the provisions of Education Code Section 47641;*
- *The process to be used to identify students who qualify for special education programs and services;*
- *How the school will provide or access special education programs and services;*
- *The school's understanding of its legal responsibilities for special education students; and*
- *How the school intends to meet those obligations.*

CalCA Monterey Coast will be committed to serving students with disabilities whether such students are currently or newly identified as having an exceptionality. Through a combination of appropriate certifications among core California-based teaching staff and contracted specialized providers, CalCA Monterey Coast will effectively coordinate with its SELPA resources to meet the needs of special learners.

CalCA Monterey Coast plans to elect the option under California Education Code section 47641 to be deemed an LEA for Special Education purposes. The school will provide verifiable assurances of its ability to fulfill all obligations in this capacity, as well as assurances that it would participate in the Tulare County/District SELPA which is approved by the State Board of Education. CalCA Monterey Coast intends to be a member of the Tulare County/District SELPA as an LEA. CalCA Monterey Coast reserves the right to request membership in another SELPA if it deems that a different SELPA would better serve the needs of the students and the school.

CalCA Monterey Coast will enroll all students who meet admission requirements as stated in the charter agreement. The school will not deny admission to students on the basis of disability; any student with an IEP who otherwise qualifies for enrollment eligibility, may apply and be enrolled. CalCA Monterey Coast will comply with and follow California Education Code § 51745 (c) which states that an individual with exceptional needs shall not participate in independent study unless the student's Individualized Education Program (IEP) indicates that independent study is an appropriate educational setting.

Therefore, the IEP team, including parents, may need to meet to discuss, determine, and document placement in a virtual independent program as appropriate based on student need, which may include amending the student's IEP to reflect independent study. Similarly, if an enrolled student's existing IEP does not provide for independent study, CalCA Monterey Coast will convene an IEP meeting to discuss the student's needs and determine whether independent study is appropriate.

Since CalCA Monterey Coast will be a program focused on individualization, flexibility, and personalization, it should be a good fit for students with special needs. Thus, CalCA Monterey Coast will be an appropriate setting for students with special needs by providing:

- 1:1 individualized instruction;
- A team of adults focused on student success;
- Ongoing consultation with educators, credentialed teachers, and curriculum specialists to assist with adapting and modifying assignments to meet specific student needs;
- Personalized Learning Plans;
- A safe and directed environment;
- Reduced environmental distractions;
- Frequent progress checks, evaluations, and reports;
- Flexible schedule that allows for students to move at their own pace;
- Ability to separate academics from socialization;
- Recommendations for/provision of software (e.g., keyboarding or speech recognition software) or other technology to facilitate communication, organization and skill development and to address special needs; and
- Supplemental, research-based online reading and math programs to address skill deficit areas at the student's instructional level.

When a student enrolls, CalCA Monterey Coast will secure the additional services required including, but not limited to designated instructional services (DIS) service providers near the individual students' home. CalCA Monterey Coast will work with the SELPA and local counties, districts, and other agencies when needed to secure these services.

As a public school, CalCA Monterey Coast, through its policies and procedures, will comply with all applicable state and federal laws in serving students with disabilities, including, but not limited to AB 602, the Individuals with Disabilities Education Improvement Act of 2004 (IDEIA), Section 504 of the Rehabilitation Act of 1973, Title II of the Americans with Disabilities Act, and any other civil rights enforced by the U.S. Department of Education Office of Civil Rights (OCR). As its own LEA, CalCA Monterey Coast, not the authorizing district, will be responsible for the charter school's compliance with all applicable state and federal laws.



To support enrolled students with IEPs, CalCA Monterey Coast will:

- Hold Annual Reviews of the IEP including a review of student progress within the existing IEP, creation of new IEP goals, and obtains parent consent for and approval of new IEP.
- Employ a Director of Student Services who is a qualified administrator to oversee all elements of the Special Education program.
- Conduct Triennial Reviews, in which students may be formally reassessed, or, if no new data is needed, then a review of the records may take place.
- Hold IEP meetings when a student has received an initial assessment; when a student demonstrates a lack of anticipated progress; or when a parent or teacher requests a meeting to develop, review, or revise a student's Individualized Education Program.
- Conduct an IEP meeting within 30 days of enrollment when a student identified with disabilities transfers into CalCA Monterey Coast.
- Invite appropriate SELPA staff and/or staff from the student's resident district to participate in this process, when needed.
- Provide and/or arranges for related services per the IEP.
- Provides training and professional development for teachers and administrators regarding identification and support of students with IEPs.

### Referring Students for Special Education Services

If the school suspects that a student requires Special Education services, the following procedures will be initiated. If needed, coordination with the appropriate SELPA staff may also occur.

- The program teacher consults with the school's student services team and implement suggested accommodations, modifications, lesson adaptations, and alternative instructional strategies. The program teacher documents all accommodations and modifications and the student's level of success with each. The parent of any student suspected of needing or qualifying for special education services may also make a referral for an evaluation at any time.
- The student is then referred to the Student Study Team (SST) to brainstorm and implement additional Response to Intervention strategies for student success and to monitor the progress of those interventions. The school's SST meets and discusses what interventions have been tried, what worked, what didn't, and what new interventions should be implemented. If deemed appropriate by the team and a disability is suspected, the SST team invites a member of the student services team (or designee) to the meeting to discuss their concerns. If the student is making good progress and responding well to the interventions, the general education program and appropriate supports remains in place with further suggested interventions.

- If CalCA Monterey Coast concludes that an assessment is appropriate, parental consent for the student evaluation is requested via an assessment plan. Parents are sent a copy of Procedural Safeguards. Assessments to determine eligibility are performed only upon receipt of written parent permission. When the assessment plan is returned, the appropriate evaluations based on suspected student need are arranged. Assessment procedures are conducted in the student's primary language, and an interpreter is provided if needed. The parent is invited to the IEP team meeting to review the assessment results. The team determines if the student has a disability and whether the student requires supports and services in the Least-Restrictive Environment (LRE).
- The IEP team, including the parent, develops goals to meet student need, determines corresponding services, and agrees upon an offer of Free and Public Education (FAPE). After IEP goals are formulated and service time is determined, the IEP is implemented. A copy of the IEP is given to the parent in accordance with state laws and SELPA policies.
- If a parent requests a special education evaluation, the process typically occurs concurrently with the SST/RTI process in order to support the student in the greatest area of need.

Special Education services will be provided in several ways including, but not limited to consultative services by phone or videoconference, direct instruction via LiveLesson session, collaboration utilizing our general education staff and Education Specialists together in LiveLesson sessions, and DIS services which may be provided online or in person depending on what is appropriate and available near the student. All Special Education services will typically be provided by CalCA Monterey Coast's Special Education team or by contracted DIS providers as appropriate. The Director of Student Services will oversee all DIS service providers and ensures that student needs are being met and services are being delivered.

CalCA Monterey Coast will place each student with an IEP in the Least Restrictive Environment to maximize the student's time within the general education setting and with typical peers. Education Specialists partner with identified general education teachers and collaborate to ensure accommodations and service minutes are delivered to students with IEPs in a supported environment with their general education peers. Students may also receive additional service minutes directly from their special education teacher in a small group or one-on-one setting according to the students' IEP.

In order to make efficient use of staff resources, IEP meetings will be generally conducted using teleconferencing or through LiveLesson sessions in order to allow all parties to participate. IEP meetings may also be held at the school office or another location. Specific arrangements are made on a case-by-case basis and are in accordance with all applicable law. CalCA Monterey Coast will maintain responsibility for tracking and implementing IEP timelines and requirements as per the appropriate laws and regulations for charter schools and in accordance with SELPA policies.

As a public school CalCA Monterey Coast, through its policies and procedures, will comply with all applicable requirements of the Individuals with Disabilities Education Act, 20 U.S.C. 1400 et. seq. (IDEA), Section 504 of the Rehabilitation Act of 1973, and the Americans with Disabilities Act.

CalCA Monterey Coast, in association with the SELPA, will provide FAPE to students with disabilities including, but not limited to identifying, evaluating, planning educational programs, and implementing placements in accordance with applicable federal and state laws.

### Services under Section 504

CalCA Monterey Coast will be solely responsible for compliance with Section 504 of the Rehabilitation Act of 1973 (Section 504) and the Americans with Disabilities Act (ADA) with respect to eligible students. CalCA Monterey Coast will develop, maintain, and implement policies and procedures to ensure identification of and service to students who may require Section 504 accommodation(s)/ modification(s), and/or placement and related services. The school will use teachers to act as 504 Coordinators, and include teachers, administrators and other specialists when needed on the 504 team. Parents are also an integral part of the Section 504 team. Parents are provided documentation and Procedural Safeguards regularly and after each meeting. CalCA Monterey Coast will also provide professional development to assist teachers with identification and support of students with 504 plans.

Additional details of the Special Education and 504 programs can be included in the Memorandum of Understanding (MOU)(see Exhibit G) as necessary.

## III. ASSESSMENT AND USE OF DATA

### III.A MEASURABLE STUDENT OUTCOMES

*Describe the measurable student outcomes that will be used by the charter school. "Student outcomes," for the purposes of this part, means the extent to which all students enrolled in the school demonstrate that they have attained the skills, knowledge, and attitudes specified as goals in the school's educational program. The pupil outcomes shall align with the state priorities, as described in subdivision (d) of Section 52060, that apply for the grade levels served, or the nature of the program operated, by the charter school. [Ref. California Education Code § 47605 (b)(5)(B) and 47605 (b)(5)(A)(ii)]*

A crucial part of CalCA Monterey Coast's plan for overall excellence will be the establishment of clear academic and related goals for each student and for the school, as well as clear ways to measure progress toward those goals. The outcomes and goals described herein are intended to be achieved over the term of the charter. The school will track progress annually towards these long-term goals. Recognizing that California is still undergoing a major change in assessment and accountability, CalCA Monterey Coast will comply with all new regulations and expectations regarding the Local Control and Accountability Plan (LCAP). The required components will be substantially addressed by CalCA Monterey Coast in this charter and in the school's day-to-day operations and planning.

In addition, the school's LCAP will be developed to be consistent with current state guidelines and requirements, including the legal requirements in California Education Code section 47606.5 and associated regulations, for both content and timing, and will be updated annually. The LCAP may therefore be used to provide further detail on annual goals for student achievement, among other things. However, the LCAP and its annual updates will not require a material amendment to the charter, as the required state priorities applicable to CalCA Monterey Coast are integral parts of the charter. More information about actions designed to achieve the following goals can will be incorporated in the annual LCAP for the school.

**Academic outcomes:** CalCA Monterey Coast will establish several core academic goals, measurements, and performance criteria. These are in alignment with the state's pupil achievement priorities as well as the mission and purpose of the school.

### **Goal I: School Performance**

CalCA Monterey Coast will use standardized testing to calibrate student performance and improvement on a yearly basis. CalCA Monterey Coast will be fully accountable for its students' achievement in keeping with current California accountability laws, including California Education Code § 52052, as well as applicable federal law and any other applicable statutory achievement requirements for charter schools.

#### **Goal I: aligns with State Priority 4.**

**Goal I: Measurement:** CalCA Monterey Coast will expect and encourage students to participate in all state-mandated testing, primarily including the standardized assessments based on the California Common Core State Standards, known as the California Assessment of Student Performance and Progress (CAASPP). Participation in standardized testing is addressed in the Parent/Legal Guardian (Caretaker) Acknowledgment (see Exhibit D) and/or the Master Agreement (see sample in Exhibit C).

**Goal I: Performance Criteria:** CalCA Monterey Coast will actively work to meet or exceed academic performance of demographically comparable schools, and to increase student academic achievement both schoolwide and for numerically significant subgroups. In addition, CalCA Monterey Coast will actively work to meet other applicable standardized test performance targets established for charter schools. These performance criteria apply to the school overall as it is compared to other demographically comparable schools with similar student groups.

**Goal I: Planned Actions:** PLCs analyze academic data; Math Support Program; ELA Intervention strategies; and AVID Program.

## Goal II: Student Progress

Based on a value-added model of academic growth, students should demonstrate a year of academic growth for each year in school. While not every student starts or ends the year at the same place on the ladder, all students should climb the same number of rungs during the time they are with our school. Students master a set of learning objectives in the core subject areas outlined for each grade level and aligned with California Common Core State Standards. Students reach this level of achievement with a mastery loop approach—that is, when students do not meet initial performance targets, CalCA Monterey Coast will intervene and provide additional support until an acceptable level of achievement is reached.

### Goal II aligns with State Priority 4.

**Goal II: Measurement:** Students enrolled in the applicable grade levels for two consecutive calendar years of state testing (enrolled by October 1 or on the October state census date of the first year and enrolled through testing the second year) will be measured by review of their performance bands on the state’s standardized assessments.

**Goal II: Performance Criteria:** CalCA Monterey Coast will actively work towards meeting the goal of having more than 75% of its students, including each numerically significant pupil subgroup, demonstrate a year of academic growth on an annual basis. A year of academic growth can be defined as movement up at least one performance band (e.g., from “Standard Not Met” to “Standard Nearly Met”) on the state’s standardized assessments (in the grades for which comparisons are possible). Students who do not improve at least one performance band but who have either “Met Standard” or “Exceeded Standard” are also considered to have achieved a year of academic growth. For subgroup calculations, this performance measure only applies to subgroups that have sufficient numbers as defined in California Education Code § 52052 (or its successors).

**Goal II: Planned Actions:** PLCs analyze academic data; Math Support Program; ELA Intervention strategies; and AVID Program.

## Goal III: Graduation and Post-Secondary Plans

Based on Post-Secondary Plans, students will be prepared to pursue educational/career opportunities after graduation.

### Goal III aligns with State Priorities 7 and 8.

**Goal III: Measurement:** CalCA Monterey Coast will work to ensure that full academic year students in grade 12 (students who are enrolled in CalCA Monterey Coast by the October state census date) will be prepared to enter two- and/or four-year colleges or universities, and/or accredited vocational schools, and/or military service branches. Developing a post-secondary plan that is tailored to the circumstances of the student will help demonstrate this career and college readiness.

**Goal III: Performance Criteria:** 90% of full academic year students in grade 12 will complete their post-secondary plan prior to the end of the school year. This performance criteria will apply to all numerically significant student subgroups and well as to the school as a whole.

**Goal III: Planned Actions:** Credit checks and Four Year Plans; Credit Recovery Program; Enhance and Expand a-g Curriculum; Develop Career and Technical Education (CTE) Program; and Summer School Program.

**Non-academic outcomes:** CalCA Monterey Coast will also establish important goals for aspects of the school that go beyond core academic learning activities but clearly support student achievement and will be in alignment with the state priorities for student achievement. All non-academic outcomes apply to the entire school but may not be disaggregated for student subgroups.

#### **Goal IV: Attendance**

CalCA Monterey Coast students will maintain high attendance rates. Attendance is a measure of student and parent engagement and can be an indicator of success in the school.

**Goal IV aligns with State Priority 5.**

**Goal IV: Measurement:** CalCA Monterey Coast will integrate multiple methods for tracking attendance, including instructional days completed, time-on-task, teacher contact, lesson completion, and completed work products. Attendance will be tracked via a parent attendance log in Connexus as well as a teacher attendance log of the final attendance credit awarded to each student each school month. Intervention strategies will be implemented if a student's attendance falls below the expected target. Different grade bands have different attendance rates, with attendance rates typically decreasing as the students enter high school.

**Goal IV: Performance Criteria:** CalCA Monterey Coast will target an average school attendance rate of 93% over the school year.

**Goal IV: Planned Actions:** Implement High School Homeroom Model; Attendance Committee; and Learning Coach Support System.

#### **Goal V: High-Quality Teaching**

CalCA Monterey Coast will provide its students with excellent teaching by teachers who are dedicated to a specific teaching task and who will work closely together to ensure the success of students.

Goal V is not required to be aligned with a State Priority.

**Goal V: Measurement:** Teacher recruitment, retention, qualifications, and performance on staff evaluations.

**Goal V: Performance Criteria:** CalCA Monterey Coast will make every effort to hire teachers that meet all of the qualification guidelines established by the charter. CalCA Monterey Coast will also hire teachers who meet the state credentialing guidelines for charter schools and who will be assigned to teach the subject matter in alignment with their credential(s). CalCA Monterey Coast will set high standards in its evaluation of teachers. As an example, “Effective” is an excellent rating, and only a handful of CalCA teachers are rated “Highly Effective” each year. CalCA Monterey Coast will actively work to ensure that retention of “Effective” and “Highly Effective” teachers meets or exceeds 90% of teachers each year, and that the overall teacher performance ratings on the CalCA Monterey Coast evaluation provide evidence of a strong teaching faculty. The goal will be that at least 90% of returning teachers have “Effective” or “Highly Effective” ratings on the school’s evaluation system.

**Goal V: Planned Actions:** Staff professional development; and Enhance staff recruiting and retention through compensation and Career Ladder.

#### **Goal VI: Parent Satisfaction**

CalCA Monterey Coast parents and students will be satisfied with their school experience, community, and culture.

**Goal VI aligns with State Priority 3.**

**Goal VI: Measurement:** In order to understand the perception of parents and students and to include their input in making decisions for CalCA Monterey Coast each year, families will participate in a parent satisfaction survey administered by an independent, third-party firm with results reported to all stakeholders.

**Goal VI: Performance Criteria:** CalCA Monterey Coast will work to ensure that families report an average of 85% or more positive responses across the 21 Parent Satisfaction Survey questions that are most directly affected by school staff. These 21 questions will be included each year as part of an annual, independent parent satisfaction survey.

**Goal VI: Planned Actions:** Learning Coach Support System; Implement High School Homeroom Model; and Enhance field trips and events.



### **III.B ACADEMIC ACCOUNTABILITY SYSTEM**

*Where applicable, include a plan for attaining improvement in pupil outcomes and addressing the state's evaluation rubrics.*

CalCA Monterey Coast will comply with all applicable state laws regarding academic accountability for public schools, including the CAASPP standardized assessments which are based on the California Common Core State Standards. California has a new accountability system that is based on multiple measures. The state has selected these measures as a way to determine the charter school's progress toward meeting the needs of its students. The measures are based on factors that contribute to a quality education, including high school graduation rates, college/career readiness, student test scores, English Learner (EL) progress, suspension rates, and parent engagement. With the implementation of the new California School Dashboard (the Dashboard), CalCA Monterey Coast will receive ratings on multiple areas each year based on the status and growth of any given measure, and based on both state and local indicators. The performance on the state indicators will be determined by the California Department of Education (CDE). CalCA Monterey Coast will participate in all assessments and report all data needed to generate the Dashboard results.

Part of each year's evaluation of the school program by the Governing Board, in coordination with school leadership, will include information on whether CalCA Monterey Coast attained its stated accountability targets. The staff of teachers, education specialists, and administrators will annually evaluate whether the CalCA Monterey Coast program needs to make any adjustments in order to meet its targets. A report will be presented annually to the school's Governing Board regarding student performance on state standardized testing as well as the Dashboard results and other relevant metrics. Based on the results, the school leadership team creates school goals for the upcoming year and presents those goals to the Governing Board as part of the School Improvement Cycle. Following approval or modification, this plan is then implemented for the upcoming school year. The annual update for the LCAP will also be considered part of the School Improvement Cycle, and LCAP goals and actions will be developed using results from an analysis of school needs.



### III.C METHOD(S) OF ASSESSMENT

*Describe the proposed method(s) by which student progress in meeting the desired student outcomes will be measured. To the extent practicable, the method for measuring pupil outcomes for state priorities shall be consistent with the way information is reported on a school accountability report card [Ref. California Education Code §47605(b)(5)(C)] The school's plan should describe a variety of assessment tools that are appropriate to the grade level, subject matter, skills, knowledge, and/or attitudes being assessed, including, at a minimum, tools that employ objective means of assessment that are frequent and sufficiently detailed enough to determine whether students are making satisfactory progress. Assessments should include annual results from the California Assessment of Student Performance and Progress (CAASPP) program and any other statewide standards or student assessments applicable to students in non-charter public schools, including, but not limited to, the California English Language Development Test or English Language Proficiency Assessments for California (ELPAC), and the physical performance test. [Ref. Criteria for Review; CCR-5 §11967.5.1(f)(2)(A), §11967.5.1(f)(3)(A-B) and California Education Code §47605(c)(1) and §47605(b)(5)(B)].*

#### Student Assessment Strategies

CalCA Monterey Coast will adhere to the same accountability measures, administer the same state assessments, and follow the same proficiency measures as all public charter schools in California, in addition to using its own internal assessment tools. CalCA Monterey Coast's various assessments will combine with top-quality curriculum and instruction to improve student achievement and maintain a high level of accountability. CalCA Monterey Coast's assessment efforts will begin with a thorough placement process and progress review, including online placements tests where indicated which help to customize the student's academic program and formulate the PLP. CalCA Monterey Coast will also utilize ongoing online and offline assessments to measure student progress on the curriculum and a technology-based assessment tool to measure student gains over the school year. The following describes the specific assessments CalCA Monterey Coast will use to evaluate the progress of students.

- **Assessment Objective Performance Report (AOPR):** This report provides real-time student performance data on essential skills and standards based upon individual math, language arts, and science assessment items. The report identifies the objectives students should master by the end of that grade level based upon the California Common Core State Standards and displays students' performance against the objectives. Data can be sorted to identify students who have or have not mastered specific objectives. Data can be sorted to identify students who have or have not mastered specific objectives. Teachers will use this data to determine which students need more help with a particular objective. They may complete individual or small group tutoring virtually with these students targeting specific skills. Currently, AOPR supports secondary courses.
- **Placement:** During enrollment in the program, each new student takes part in a placement process that includes review of previous school records and assessment results, review with parents, and use of placement tests as needed. High school students are then typically placed by grade-level as determined by their cohort year.

- **Yearly Progress:** Two internal assessments will help identify academic growth during the school year. LEAP (for students in grades K–8) provides essential diagnostic information for developing the PLP and planning instruction. It provides an early predictor of performance on mandated state tests and reports key accountability data on progress throughout the academic year. This will also be helpful for assessing students who are either significantly ahead or of behind their grade level peers. CalCA Monterey Coast plans to use the SPS assessment for students in grades 9-11 for pre- and post-testing. Connections has conducted an internal analysis of the relationship between academic growth, as assessed by LEAP and the SPS, and state test proficiency. Results indicated that growth as assessed by both assessments displayed a statistically significant relationship (through a logistic regression analysis) with state test scores. For both reading and math, the presence of growth during the year on LEAP and SPS was associated with proficiency on state assessments in the spring. (Note: The school may replace the LEAP or SPS tests with a comparable pre- and post-assessment of student progress if a superior assessment tool is found.)

- **Longitudinal Evaluation of Academic Progress (LEAP)**

This assessment tool would be used for students in grades K–8 as a technology-facilitated pre-, mid-, and posttest. It provides an essential benchmark relative to the student's grade level standards. This data is used for developing and planning instruction, provides an early read on a student's performance on state-mandated tests, and reports key accountability data on student progress throughout the academic year. It is expected that the school will use this benchmark assessment for students in K-8. However, benchmark assessments may change as the school progresses through the term of its charter.

Results are available to teachers through Connexus as students complete the assessment. Teachers have access to student's overall scores, scores within content areas, and information based on the student's overall score that highlights the extent to which a student is at-risk for struggling academically.

- **Scantron Performance Series (SPS)**

These tests are online adaptive assessments that CalCA Monterey Coast plans to use as a pre- and post-test academic assessment. The SPS assessments are managed by Global Scholar and align with the curriculum as well as state standards. High school students, in grades 9–11, are given these tests twice during the school year: once in the fall and once in the spring. There are separate tests for reading and math. Students are assigned the tests that align with their enrolled curriculum.

As with the LEAP assessment, SPS results are available to teachers through Connexus as students complete the assessment. Teachers have access to students' overall scores, scores within content areas, and information based on the student's overall score that highlights the extent to which a student is at-risk for struggling academically.

- **Ongoing Informal Assessments:** Students engage in several formative assessments that tap into all levels of student learning such as scored daily assignments, and daily checks for understanding which require students to apply and integrate new skills in a thoughtful manner. Other more subjective assessment activities include written journal responses and group discussions.
- **Unit Assessments and Offline and Online Portfolio Assignments:** Throughout each logical unit of study, students are required to complete a series of offline and online assessments. Offline assessments include written compositions, science lab reports, essays, book responses, and a variety of work samples. These assessments require direct teacher evaluation. Online assessments include quizzes and unit tests. While the quizzes are brief and frequent, the more comprehensive unit tests occur at the end of an entire unit. Online assessments provide students and families with immediate objective feedback while offline assessments provide valuable reflection, feedback, and expertise from credentialed teachers. Student progress reports and grades include a combination of quizzes, tests, work samples, and teacher feedback.
- **Curriculum-Based Assessments:** CalCA Monterey Coast will use curriculum-based assessments (CBAs) as a quick and effective way to gather additional information on students' understanding of concepts through telephone conversation. Diagnostic curriculum-based assessments (DCBA) pinpoint strengths and weaknesses in student mastery of concepts. Verification curriculum-based assessments (VCBA) authenticate student learning of concepts previously graded as completed with scores of B or higher.
- **Baseline Achievement Data:** Whenever possible, standardized test results are integrated into an incoming student's basic information in Connexus. Likewise, results for the state's standardized tests that students take while enrolled at CalCA Monterey Coast, which are proctored face-to-face at a physical location, are included in Connexus along with internal pre- and post-test data. This data is used to track student progress from year to year and within the year and to inform course placement and instructional needs of students.
- **State-mandated assessments:** CalCA Monterey Coast will be dedicated to meeting and exceeding all of California's goals and grade level requirements. At in-person, proctored locations, CalCA Monterey Coast students will participate in proficiency (CAASPP) tests and all other assessments required by California. Results of these annual assessments will be reported through the CDE as well as communicated directly to parents when required. Participation in the state testing program allows for comparisons between schools statewide. Because the tests must currently be administered face to face, and because a significant percentage of parents exercise their right to opt out their students, participation rates in state testing can be a challenge.

### School Assessment Policies

Responsibility for monitoring, evaluating, adjusting, and adhering to the school's assessment policies and practices will follow a traditional model. Teachers will have primary responsibility for administering assessments and providing feedback to administrators.

The Executive Director and Principals will oversee the assessment program and work with the Leadership Team as well as education specialists in evaluating and making recommendations for changes.

Connections also evaluates the assessment component and makes recommendations to the Executive Director and the Governing Board. The Governing Board will have ultimate responsibility for ensuring that the school is fulfilling the expectations and obligations under charter school law, the charter, and approved school policy.

CalCA Monterey Coast's assessment program will utilize solid baseline security, as described below, and integrate a variety of forms of assessments – offline as well as online, qualitative as well as quantitative, direct and indirect, informal and formal. The school will have multiple opportunities to ensure that students are doing their own work and are not being inappropriately helped by a parent or other family member.

Basic security will be provided by the Parent/Legal Guardian (Caretaker) Acknowledgement (see Exhibit D) which requires signed assurances of academic integrity, and also through a unique user name and password provided to each student, distinctive from that of parents and Learning Coaches, which assures proper access to online assessments. Students will be instructed about the school's Honor Code, laid out in the School Handbook (see Exhibit B), and will be reminded of and acknowledge their agreement to submit original work at the start of each online assessment.

CalCA Monterey Coast plans to use CheckMyWork, a plagiarism-checking tool (based on UniCheck™) to help teachers and students identify and correct inappropriate re-use of content. Following established guidelines, students may be required by their teacher to run their essays and other authentic assessment documents through CheckMyWork before submitting these assignments to the teacher and attaching the CheckMyWork report URL to their submissions. This gives students an opportunity to correct any unintentional plagiarism and allows teachers to see at a glance where academic integrity issues may exist.

The variety of assessment forms also promotes security. Frequent online quizzes, periodic online and offline unit tests, (some of which are randomized and/or timed), CBAs, and the standardized pre-and post-tests are compared against the student's portfolio samples to detect any mismatches. Teachers are specially trained in telephone and WebMail message questioning techniques to evaluate student mastery of concepts.

Students and parents suspected of inappropriate assessment behavior will be confronted immediately and subjected to standard disciplinary action as specified in the School Handbook (see Exhibit B). All students will be required to sign the school Honor Code indicating their understanding of the expectations of academic honesty. Cheating, plagiarizing, or other acts of academic dishonesty are directly counter to the principles of academic excellence and harm most those students who engage in such activities — they cheat themselves of the opportunity to fully develop their intellectual abilities. The Honor Code serves to reinforce students' commitment to academic excellence, and all students acknowledge the Honor Code.

### **School-wide Assessment Strategies**

In addition to assessment of students, CalCA Monterey Coast will use a variety of measures for determining the success of the overall school program.

**School self-assessment/evaluation:** CalCA Monterey Coast will have very specific and measurable objectives for success, based upon the academic progress of its students and the school's performance on several non-academic measures. The school administration will use Connexus to watch each of these variables very closely to monitor the school's overall success. The Executive Director, in collaboration with the staff and with the school Leadership Team will develop a list of measurable annual school goals that are designed to ensure continuous school improvement. The Governing Board approves these school goals.

**Teacher and administrator evaluation:** The purpose of the performance evaluation system will be to create a high-performance school by encouraging staff to put forth their best effort, focusing everyone on the school's main goals (as determined by the school leadership in collaboration with the Governing Board and based on the school's charter), rewarding and retaining staff based on outcomes/results, and providing continuous feedback for professional development.

Teachers and administrators will normally receive a formal mid-year review in December or January, and a formal end-of-year review in May or June. They will also receive periodic feedback both formally and informally from their manager throughout the school year.

Teachers and administrators will be evaluated based on competencies. The professional competencies align with the core standards for teaching, and may vary by type of teaching position (e.g., Special Education) or administrative position (e.g., Principal).

Competencies will be reviewed with staff and will be available for viewing and comment throughout the school year.

The core teaching competencies will typically include the following (additional competencies may be assigned based on position, responsibilities, and job level):

- Ensure high quality instruction,
- Personalize students' programs,
- Monitor student performance and provide timely feedback and intervention,
- Monitor student participation,
- Communicate frequently,
- Conduct and document all required contacts, and
- Collaborate and develop professionally.

Competencies will be evaluated in the context of the school's goals, which evaluate student growth and achievement metrics, and observations of a teacher's or administrator's proficiency within each competency are evaluated using various methods including parent and student feedback, observations of lessons and interactions, and review of relevant documentation and data.

Competencies will be evaluated using a standardized scale and will include comments from the supervisor. The scale currently in use has the following levels of performance:

- Highly Effective
- Effective
- Needs Improvement
- Ineffective

Teachers and administrators may receive an Overall Individual Rating on the end-of-year review based on evaluation of the competencies. All compensation increases, after an initial salary offer, will be based on performance. Teachers and administrators may receive an annual merit increase and may be eligible for an annual bonus incentive, both based on evaluation of competencies, and the Overall Individual Rating, as well as the school's overall achievement of its performance goals.

The outcome of an individual's evaluation will affect future decisions regarding staff retention, promotional opportunities, or disciplinary action and termination decisions. A teacher or administrator needing improvement will be placed on an individualized Performance Improvement Plan (PIP) and given opportunities for professional development, specifically in the areas requiring improvement.

### **III.D. USE AND REPORTING OF DATA**

*Outline the plan for collecting, analyzing, and reporting data on student achievement to school staff, parents, and guardians. Also describe the plan for utilizing the data continuously to monitor and improve the charter school's educational program.*

Connexus will capture all needed data about students, including information about their participation and their performance. This data will be accessible for viewing by school staff, teachers, and parents/guardians on a moment-by-moment, day-by-day basis. In addition, this data will be used for formal reporting to various stakeholders on the students' — and the school's — instructional progress.

#### **Grade Books and Data Tools**

Both Learning Coaches and teachers will have access to an electronic Grade Book that tracks all results and serves as the basis of changes in the student's learning plan. A key aspect to assessments is the detailed feedback provided by the teachers beyond the simple right/wrong grading of many traditional assessment vehicles. CalCA Monterey Coast will also utilize a variety of advanced data visualization tools that provides students, parents, teachers, school administrators, district partners, regulators, and researchers with views of how students are performing.

In addition to formal graded assignments, teachers will continuously monitor student work via Connexus. Teachers will note performance on computer-graded quizzes and checks for understanding. Teachers may also reach out to students via synchronous telephone or LiveLesson sessions-based CBAs to verify student work and/or diagnose difficulties in mastering discrete skills and concepts. Connexus will track teacher response time and teacher-student/teacher-parent communications. Connexus will provide the school leaders with rich, actionable data on this key aspect of teacher performance.

Also, a feature in Connexus will send auto-generated WebMail notifications to students and their Learning Coaches when teachers enter feedback in all assessments. Automatic WebMail notifications direct students and Learning Coaches to the specific assessments for which the feedback is provided, creating a continuous loop of communication on student learning.

Figure 22 is the teacher's homepage where they can track if students are on target. In a more detailed view of the class, shown in Figure 23, teachers can see if students have overdue lessons and are falling behind. Figure 24 shows a specific student's Grade Book.

Figure 22. Teacher's Homepage

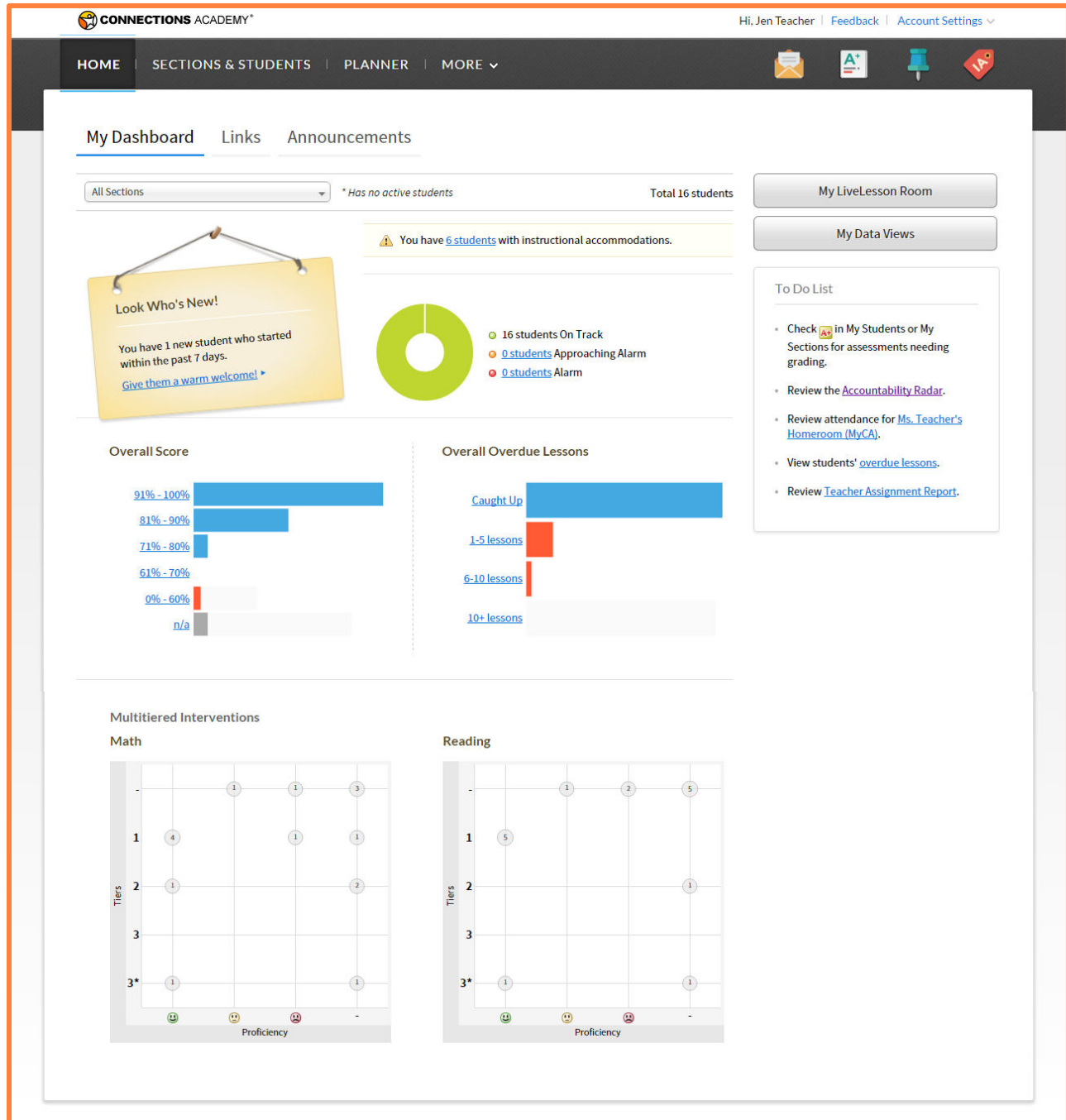




Figure 23. Students with Overdue Lessons

CONNECTIONS ACADEMY<sup>®</sup> Hi, Jen Teacher | [Feedback](#) | [Account Settings](#) ▾

HOME | **SECTIONS & STUDENTS** | PLANNER | MORE ▾

My Sections | **My Students**

All Sections ▾

\* indicates there are no active students

Quick Search  Score Range: 0% - 100% More than 0 overdue lessons Select Columns ▾

Total 16 students

ID	My Students	Days Enrolled	Grade	Attendance	Overall Score	Total Overdue	Alerts	Intervention
100661	Demo, Stella	179	10	On Track	n/a	0	0	M-~/R-~
128788	Demo, Dee	179	6	On Track	88%	6 lessons	0	M-~1/R-~1
146122	Demo, Chelsea	179	9	On Track	10%	0	0	M-3*/R-3*
167915	Demo, Meaghan	179	7	On Track	90%	5 lessons	0	M-~3*/R-~3*
216090	Demo, Anderson	179	12	On Track	n/a	4 lessons	0	M-1/R-2
216091	Demo, Jackson	179	8	On Track	95%	4 lessons	0	M-~2/R-~1
216092	Demo, Olivia	179	11	On Track	n/a	0	0	M-~/R-~

Figure 24. Specific Student Grade Book

CONNECTIONS ACADEMY<sup>®</sup> Hi, Anderson Demo | [Feedback](#) | [Account Settings](#) ▾

HOME | PLANNER | VIRTUAL LIBRARY | MORE ▾

Full Transcript | High School Transcript

**User Grade Book for Anderson Demo (ID 216090)**

Show me active ▾ sections ?

**Grade Book Details**

Section Summary: Click a section name to view details.

Section	Score	Grade	Lesson Completion	Teacher	Objectives
<a href="#">Calculus B</a>	87%	B+	40/43 (96%)	Teacher, Jen	<a href="#">29 objectives</a>
<a href="#">English 12 B</a>	92%	A	25/57 (45%)	Teacher, Jen	<a href="#">36 objectives</a>
<a href="#">Living Music I</a>	93%	A	37/46 (90%)	Teacher, Jen	
<a href="#">Marine Science B</a>	97%	A+	35/41 (89%)	Teacher, Jen	
<a href="#">Psychology B</a>	75%	C	34/35 (99%)	Teacher, Jen	
<a href="#">Web Design I B</a>	97%	A+	15/21 (79%)	Teacher, Jen	
<b>Overall</b>	<b>87%</b>		<b>201/243 (84%)</b>		

**Progress Reports**

[October 1 2015](#)

[October 1 2015](#)

[October 1 2015](#)

[October 30 2015](#)

[October 30 2015](#)

[October 30 2015](#)

[October 30 2015](#)

[October 30 2015](#)

### **Local Control and Accountability Plan (LCAP)**

Annually, in accordance with the legal and regulatory requirements for charter schools, the school will account for its progress against its performance measures to its stakeholders through updates to the Local Control and Accountability Plan (LCAP), submitted to the charter school Governing Board for input and approval, and then to PES and the County Office of Education (see also Sections III.A and VIII.A).

### **All Required Reports**

Connexus is fully customizable to meet school district, county, state, and federal reporting needs in the form best suited for integration with existing information systems. By using Connexus, school leaders can gather, monitor, analyze, and report more granular data about the virtual school's effectiveness than most traditional, brick-and-mortar schools find necessary.

Connexus was designed specifically for a full-time virtual school and is intended to provide 360-degree accountability through comprehensive data collection, analysis, and reporting to all stakeholders.

For example, the School Accountability Report Card (SARC) will be developed annually by CalCA Monterey Coast staff using data collected from Connexus and will then be made available to the Governing Board, parents, district staff, and members of the public through a posting on the school and state public websites.

In addition, the school will report student data to CALPADS (California Longitudinal Pupil Achievement Data System) as required, using a state approved student information system which is populated with data from Connexus.

The school will maintain student records in accordance with state, local, and federal requirements. All student record information will be the sole property of the school and subject to applicable law. Connexus is a thoroughly integrated content and student information system linking all aspects of the student learning process.

CalCA Monterey Coast will fully comply with the requirements of the Family Educational Rights and Privacy Act (FERPA), a federal law that gives parents/legal guardians and students certain rights regarding the student's education records. Included is the right to the protection of a student's personally identifiable information in their education records from unauthorized disclosure. In addition to the requirements of FERPA, the Individuals with Disabilities Education Act (IDEA) may provide additional privacy protections for students who are receiving special education and related services. Part B of the IDEA incorporates and cross-references FERPA. CalCA Monterey Coast will be aware of the cooperation between FERPA and IDEA and will adhere to the applicable requirements of both. CalCA Monterey Coast will comply with the Protection of Pupil Rights Amendment (PPRA) and the Children's Online Privacy Protection Act of 1998 (COPPA).

### III. GOVERNANCE

*Describe the planned governance structure of the school, including the process to be followed by the school to ensure the involvement of parents and guardians on behalf of the school's students. [Ref. California Education Code §47605(b)(5)(D)] and Ref. Criteria for Review; CCR-5, §11967.5.1(f)(4)] Specifically illustrate how the school will be organized – and how that structure is designed to support student success. Describe respective roles of the board and administration, the domains for which each will be responsible, and how their relationship will be managed. In addition, provide details of how the charter school's board will be developed, in terms of supplementing necessary skills and providing training in effective board practices.*

*Describe how the design of the governance structure reflects a seriousness of purpose necessary to ensure that: (1) the charter school will become and remain a viable enterprise; (2) there will be active and effective representation of interested parties, including, but not limited to parents and/or guardians; and (3) the educational program will be successful. Evidence of the organization's incorporation should be provided as an Attachment, as necessary. [Ref. Criteria for Review; CCR-5, §11967.5.1(f)(4)]*

#### IV.A GOVERNANCE STRUCTURE

##### Corporate Status

Pursuant to California Education Code section 47604(a), CalCA Monterey Coast is operated by California Online Public Schools (CalOPS)<sup>28</sup>, a California non-profit public benefit corporation. CalOPS shall comply with all provisions of the charter petition, as approved by PES, with respect to all activities and operations of the charter school. CalOPS may, consistent with its Articles of Incorporation and charitable purposes for which it was formed, carry out other activities which are complementary with, supportive of and not inconsistent with its charter school's operations.

##### Roles and Responsibilities

The Governing Board<sup>29</sup> governs the charter school. The Board sets policy and is responsible for assuring that all aspects of the financial and programmatic accountability systems fulfill CalCA Monterey Coast's charter with PES as well as its obligations to the California Department of Education. PES shall not be responsible or liable for the operations of CalOPS. The school will be governed pursuant to this charter (current Bylaws and Articles of Incorporation are attached in Exhibit E). The Governing Board adopts all policies as required for the independent study program of CalCA Monterey Coast.

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<sup>28</sup> In August of 2018 three existing non-profit corporations were merged to form California Online Public Schools, which now governs all the California Connections Academy Schools.

<sup>29</sup> In this document, use of the term "Board" or "Governing Board" refers to the California Online Public School (CalOPS) Governing Board (the school's Board) unless otherwise specifically indicated.

The roles and responsibilities of the Governing Board include, but are not limited to:

- Protecting the legal interests of the charter school;
- Determining the vision/mission of the school;
- Setting Board policy;
- Managing and governing the operations of the school;
- Exercising sound legal and ethical practices and policies;
- Managing liabilities wisely;
- Advocating good external relations with the community, school districts, media, neighbors, parents, and students;
- Hiring and evaluating the Executive Director (also referred to as the Lead School Administrator);
- Providing oversight and/or approval of major contracts as consistent with the Governing Board's responsibilities and the school's policies and procedures;
- Complying with state and federal reporting requirements;
- Practicing strategic planning;
- Approving an annual budget and interim reports as required by law;
- Ensuring adequate resources and managing them effectively; and
- Assessing the organization's performance.

The Board plans to contract with Connections to provide certain services to the school under the terms of a "Statement of Agreement." The contract is designed to have a term that coincides with the term of the charter, consequently, following charter approval, the Board plans to proceed with negotiation of a Statement of Agreement with Connections for the next five years, consistent with California law. The current draft of the Statement of Agreement is included as Exhibit F. The Board is responsible for ensuring the performance of Connections or its successor in accordance with its obligations under the Statement of Agreement. Further information about the Statement of Agreement is provided in Sections IV.C and VII.I.

The Board currently holds nine regular meetings per school year. The Board meetings are posted and typically held telephonically in compliance with California Government Code section 54953. Pursuant to the Ralph M. Brown Act, the agenda for regular meetings are publicly posted at least 72 hours in advance of the meeting, including a public posting on the school website. The public may directly address the Board at meetings, and members of the public, including parents, are also able to attend Board meetings via teleconference upon request or from any teleconference location.

### **Board Composition**

The members and officers of the Governing Board are selected in compliance with the Bylaws. The Governing Board, in selecting future Board Members, strives to ensure potential members are committed to the school's mission, are willing to actively support and promote the organization (both the corporation and any of its charter schools) and are dedicated to its educational endeavors.

In addition, the Board evaluates the potential members' credibility and integrity within the community. The Governing Board actively recruits Board Members who have professional skills that complement or add to the existing Board composition. The Board endeavors to seat at least one board member who a representative of each charter school operated by the corporation, such as someone who resides in the local area and/or a county served by that charter school, as well as a community leader in an area served by the schools operated by the corporation. The Board also considers members' professional, educational, and practical experience. The Board also makes an effort to seat someone with expertise in education. In order to ensure parental involvement in the governance of the school, the Board also makes efforts to recruit a qualified parent of a current or former student who is/are/were enrolled in a charter school operated by the corporation to serve as a Board member. One board member may satisfy multiple categories.

As per the Bylaws, the Board members vote to fill positions with new or continuing Board Members, with a majority vote required. The sponsoring district of any charter governed by the Governing Board may add a representative to the Board (reference California Education Code § 47604(b)). PES may choose instead to select a Board liaison who would be included in all meeting notifications, meeting agendas and open session materials, and who may also have time allocated on the agenda to provide PES updates to the charter school Board.

Any current employee of CalCA Monterey Coast will not be eligible to serve on the Governing Board. No current employees of Connections are eligible to serve on the Governing Board.

### Board Training

In order to ensure smooth operations and effective Board practices, the Governing Board members may participate in various training sessions in state (Annual California Charter Schools Conference) and national (National Charter Schools Conference and National School Boards Association) conferences, as well as other training opportunities provided by the Charter Schools Development Center (<http://www.chartercenter.org/>) and California Charter Schools Association (<http://www.ccsa.org/>). In the recent past, the CalOPS Board participated in two in-person retreats, a training in December 2017, and a strategic planning session in March 2018. Additional sessions such as these are planned periodically.

Training topics include charter school basics, non-profit management, conflict of interest, budgeting and financial oversight, effective meetings, policy development and human resources oversight. In addition, when Board Members participate in the California and National Charter School conferences and workshops they are able to network with other charter Board members and access additional resources in order to further their development as effective Board members.

### Compliance with Corporate Law

The Board adheres to all applicable laws for non-profit public benefit corporations operating charter schools including, but not limited to the laws regarding interested parties and conflict of interest. In addition, since the Governing Board assumes responsibility for a public charter school, the Board agrees to conduct its business in compliance with the relevant sections of the Ralph M. Brown Act. CalOPS shall conduct all operations of CalCA Monterey Coast, including Board meetings in accordance with applicable sections of the Ralph M. Brown Act as set forth in California Government Code § 54950, *et seq.* and applicable provisions of the Education Code.

The Board has adopted and regularly updates a Conflict of Interest Code consistent with the Political Reform Act which reflects CalCA Monterey Coast's full commitment to financial transparency and service. The Conflict of Interest Code requires Board members and key designated employees to annually file financial disclosure statements (known as the Form 700). CalOPS' Conflict of Interest Code adopts the California Fair Political Practices Commission's Model Code and is approved and periodically updated by the CalOPS Board and is also sent to the Fair Political Practices Commission (FPPC) for final approval. Updates will be submitted to the District Superintendent or designee following approval by the FPPC.

## Operating Structure

The operating structure of the school will include an Executive Director (also referred to as the Lead School Administrator<sup>30</sup>) who will oversee a Leadership Team made up of school principals and assistant principals, and other administrators. The Leadership Team will supervise the teachers and administrative support staff. The Executive Director will act according to the policies and procedures as approved by the Board. The Executive Director will also act in an information and advisory capacity to the Board and will be responsible for implementing Board policies in the day-to-day operation of the school. All personnel decisions concerning the Executive Director will ultimately be the responsibility of the Board.

### IV.B PARENTAL AND STUDENT INVOLVEMENT IN DECISION-MAKING

To promote student success, CalCA Monterey Coast will strive for a high level of parental involvement. This will extend beyond the central role parents play in their own children's day-to-day learning and allow parents/guardians to also be integrally involved in shaping CalCA Monterey Coast and making certain that it fulfills its overall mission. Parents will have the opportunity to serve on the Governing Board. Parents, staff, and students may also serve in ad hoc work groups and committees as needed to advise the Board or the school administration on specific matters of interest and concern, including through their membership in Club Orange, a parent support organization for schools support by Connections. While parental involvement is highly encouraged and critical to student success, parental involvement is not a requirement for acceptance or continued enrollment.

In keeping with the state's new accountability strategies under the Local Control Funding Formula, CalCA Monterey Coast will engage the school community in the development and review of the school's LCAP. This process will include soliciting feedback from parents. One route for parent feedback will be the annual Parent Satisfaction Survey (More information is provided in Section VIII.A).

Since the school's goal will be to provide all parents with the opportunity to be informed about and participate in school level decision-making, information about the Board meetings, agendas, and activities will be readily available to all families. For example, all agendas as well as contact information for Board members, are posted on the school website. In addition, CalCA Monterey Coast will provide for ongoing interaction with parents via electronic feedback tools and regular parent surveys. The Governing Board typically holds its meetings telephonically to ensure that the community has the ability to easily attend meetings. Parents and members of the public can attend the Board meetings via teleconference. Regular meetings of the Board are held according to the schedule adopted by the Board, and the agenda for regular meetings are posted on the website and at any physical location (as well as teleconference locations, if required) where the meeting will be held at least 72 hours in advance.

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<sup>30</sup> Position title used in the Statement of Agreement



Additional details of the various ways that parents may participate in CalCA Monterey Coast in many ways, including:

- **Parents Involved in Planning:** Prospective parents are invited to attend one of the many Information Sessions offered. Parents are represented on the School Advisory Committee, which is designed to gather input from parents on key school issues such as the Local Control and Accountability Plan, as well as the specialized academic programs such as the English Learner and academic intervention programs.
- **Parent Representation on the Board:** The bylaws provide for one position to be held by a parent. The parent position could be a parent or guardian of a student currently enrolled, formerly enrolled, or intending to enroll at the school. These parent members benefit from intensive Board training geared toward making them optimally effective representatives of parent interests. Parent Board members will be encouraged to seek officer positions and may be appointed to provide close review/feedback on key documents such as the School Handbook, Parent/Learning Coach Agreements, and other materials for parents before full Board action.
- **Public Comment:** Parents (as well as any other members of the public) attend and may make public comments during public portions of all Board meetings.
- **Parent Volunteers:** The school may create volunteer positions for parents called Community Coordinators. In either this more formal volunteer role, or through informal engagement between families, parent volunteers will play a critical role in the school by developing a vibrant and active school community to serve the needs of families distributed across a wide geographic region. In addition to facilitating family get-togethers and participating in formal field trips, the parent volunteers and/or Community Coordinators serve as an important communication link between families and the school, ensuring that school staff are attuned to parent community needs and vice versa. Volunteering is never a requirement for any parent.
- **Parent Club:** Parents can also join an exciting club that brings together parents of prospective and enrolled students who reach out to their local communities to spread the word about CalCA Monterey Coast and provide support and encouragement to other parents. This Parent Club, Club Orange, has similarities to a Parent Teacher Organization (PTO) in a traditional school setting.
- **StarTrack and Course Ratings and Parent Surveys:** As mentioned previously, parent input will be gathered on an ongoing basis via StarTrack ratings for lessons and courses. On every lesson in the curriculum, and on the home page for each Learning Coach, is a StarTrack rating box inviting ratings on a five-star scale and an opportunity to provide text feedback. Parent surveys are administered annually by an outside third-party administrator.



#### **IV.C SCHOOL SERVICES CONTRACT**

CalCA Monterey Coast plans to contract with Connections for certain services consistent with California law. The Statement of Agreement details the respective roles of the Governing Board and Connections (also described in Section VII.I and Exhibit F). The non-profit Board will operate the charter school and maintain responsibility for ensuring that the charter school program meets all educational, fiscal, and programmatic goals laid out in this charter.

The non-profit Board will regularly review Connections' services to ensure it is meeting the required accountability standards. The non-profit Board is a completely independent entity from Connections. The IRS conducted a rigorous review of the organization in order to make the decision to award tax exempt status to the charter school corporation (see Exhibit E). By conferring this status to the non-profit Board, the IRS validated the independence of the school and its Governing Board from Connections.

#### **IV.D GOVERNANCE FOR SUCCESS**

The governance structure has been designed to ensure success for CalCA Monterey Coast. The non-profit Board is the legal entity that holds the charter. This independent non-profit Board has overall governance authority over the charter school. The Board adds additional members based on the criteria outlined in the Bylaws. The Board Members embrace the roles and responsibilities of an effective charter school Board. The Governing Board represents a diverse array of experiences and qualifications including parents, educators, business and community leaders who are committed to deliver high-quality, highly accountable virtual schools in California.

The Board will ensure that the school receives input in decision making from all stakeholders: the authorizing district, parents, staff, and other community members.

CalCA Monterey Coast will provide a stable high quality virtual educational choice for families in Santa Cruz County and the surrounding counties.

## IV. HUMAN RESOURCES AND SAFETY

### V.A QUALIFICATIONS OF SCHOOL EMPLOYEES

*Describe the standards that will be used in hiring teachers, administrators, and other school staff, including, but not limited to the general qualifications for the various categories of employees the school anticipates hiring and the desired professional backgrounds, depth of experience, and other qualities to be sought in their selection. [Ref. California Education Code §47605(b)(5)(E)] Show how those qualities will help the school implement its vision, and how they will satisfy any requirements for fully qualified teachers under state or federal law. The qualifications should be sufficient to ensure the health and safety of the school's faculty, staff, and students. Identify positions that will be regarded as "key" in each category and specify the additional qualifications expected of individuals assigned to those positions. Include an assurance that all requirements for employment set forth in applicable provisions of law will be met, including, but not limited to credentials. [Ref. Criteria for Review; CCR-5, §11967.5.1(f)(5)]*

CalCA Monterey Coast will strive to offer a work environment that provides opportunities for each employee to maximize their potential and meet the highest performance standards. Incorporated in this organizational culture will be core values:

- We value creativity in all aspects. We expect and support employees to be creative with their ideas, their work environment, and their approach to their jobs.
- We value the health and comfort of our employees.
- We will recognize and reward exceptional performance.
- We will be available to answer questions or take suggestions from any employee.
- We appreciate employees' ideas. We firmly believe the person doing a job is in the best position to think of ways of doing it more easily, efficiently, and effectively.
- We value and support education and expect everyone to undertake life-long learning.
- We expect everyone to work very hard, but we value family above all else. We will always work to make sure that we provide the flexibility and support in our work environment so that our employees can attend to family emergencies and educational needs.

#### Teacher Certification

The school will employ teaching staff who hold appropriate California teaching certificates, permits, or other documents issued by the Commission on Teacher Credentialing, as required by state law for charter schools. The school will also monitor and, when required, adhere to California's implementation of federal qualification guidelines for teachers under Every Student Succeeds Act (ESSA) or its successors. These teachers will teach the core academic courses in mathematics, language arts, science, and history/social studies. These teachers will be responsible for overseeing the students' academic progress in the core subjects and for monitoring grading and matriculation decisions as specified in the school's operational policies.

All credential documents will be maintained on file at all times and are available, upon authorizer request, for inspection.

In limited circumstances, such as when a student or small group of students select a course that does not warrant a full-time teacher, the CalCA Monterey Coast may utilize the teaching resources of International Connections Academy (iNaCA), a fully accredited online private school. The school may also employ non-California-credentialed instructional support staff in any case where a prospective staff member has an appropriate mix of subject matter expertise, professional experience, and the demonstrated capacity to work successfully in the virtual environment. Instructional staff without California credentials may assign grades and evaluate student progress in non-core or non-college preparatory courses and activities, such as some electives, or if retained as a short-term substitute. In addition, instructional support staff may provide support for a credentialed teacher, such as when implementing in-person lab instruction. All staff members will possess experience and expertise appropriate for their position within the school, as outlined in the school's staffing plan and the school's adopted personnel policies.

### Staff Recruitment

The school will recruit staff through a variety of channels, including traditional methods for posting job opportunities, plus networking with area colleges, charter schools and charter school organizations; outreach via enrolled families; and special outreach to teachers and administrators who are seeking a more flexible or alternative environment.

### Human Resource Issues

In accordance with applicable law and in keeping with its goals of providing exceptional talent in the service of California children and their families, CalCA Monterey Coast will assure adherence to clear guidelines regarding such human resource issues as equal opportunity employment, harassment, personnel files, and other legally required issues. All of these issues will be documented in the Employee Handbook that is available to staff as part of the hiring process as well as available at any time through Connexus.

### Staff Qualifications

CalCA Monterey Coast will set the following experience and qualifications standards for personnel:

- **Principal and/or Site Administrator** – This professional should hold an advanced degree and an administrative credential. He or she should have a minimum three years management or administrative experience; a former principal or teacher is ideal. This professional must be technology literate and have good communication skills. She or he must be able to build consensus and inspire teachers to teach, students to learn, and parents to engage in their child's learning while following the mission of the school.

- **Teaching Staff** – Teachers in core college preparatory subjects hold an active California teaching credential (or other document issued by the California Commission on Teacher Credentialing) as required by state law for charter schools. Teachers must have a Bachelor’s degree. The school prefers to hire teachers with teaching experience, ideally three or more years. Teachers must be skilled at teaching a standards-based curriculum and incorporating innovative approaches to instruction. Teachers should demonstrate good communication skills and be technology literate. The school pays special attention to applicants who have experience in individualized instruction, virtual teams, and distance education. Teachers responsible for providing Special Education services have experience and/or hold a valid California certification in Special Education. Additionally, EL teachers are qualified to teach EL students, as required by applicable state law, and have experience teaching EL students. EL teachers are also sought who are bilingual.
- **Administrative Support Staff** – These staff members are responsible for daily administrative tasks such as answering phones and emails, receiving visitors, entering data into the online student information system, scheduling appointments, generating reports, performing enrollment, attendance and registrar duties, executing state reporting duties, assisting administrators and teachers with administrative tasks, filing, and other duties as assigned. These staff members have excellent communication and interpersonal skills and work well as part of a team.

### Virtual Education Support Center

Teachers will have access to a variety of curriculum and instructional resources and support staff through Connections’ virtual Education Support Center (also known as the Education Resource Center or ERC). This support system includes a mix of dedicated and shared-use personnel who deliver support to CalCA Monterey Coast. This support not only provides the CalCA Monterey Coast community with unparalleled level of educational expertise and experience, but also enables CalCA Monterey Coast to expand support for students and parents beyond the traditional school day.

The array of services will include:

- School support helpdesk to answer teacher questions regarding the platform, curriculum, assessments, or general instructional support questions;
- Instructional consultation support for teachers in personalizing learning, implementing multi-tiered instruction, using supplemental instructional support programs, engaging and motivating students, and differentiating instruction; and
- Assessment support services including assistance with the selection of testing instruments, test creation, test preparation strategies, and the analysis and use of test data.

### **Staffing Plans**

CalCA Monterey Coast will develop staffing plans and recruit and hire sufficient staff so that the school can meet any legally required student-to-teacher ratios for California. The projected budget will be developed each year based on the required student-to-teacher ratio in place for that year. The school will comply with applicable California regulations regarding the student-teacher ratio. The staffing plans will also identify how many administrative and support positions are available at the school each year and will lay out the allocation of staff between all of the CalCA schools for that year.

### **Staff Training**

Prior to the opening of school each year, CalCA Monterey Coast, with support from Connections, will provide a complete training program for program teachers, the school Leadership Team, and other staff who have direct contact with students. Training topics will include the curriculum, technology, monitoring student performance, and virtual school instructional techniques. Throughout the year, staff members will have multiple opportunities to participate in professional development activities for the school as well as opportunities to collaborate with teachers at other schools supported by Connections nationally. Teachers will have daily access to curriculum specialists for “just-in-time” training on particular curriculum issues. The teachers and school leaders also may provide their own informal ongoing professional development.

### **Onboarding Training and Teacher Orientation**

Newly hired teachers at CalCA Monterey Coast will participate in a series of synchronous and asynchronous activities with Connections’ Training Support team to transition from teaching in a brick-and-mortar school to teaching in a virtual school. During the synchronous sessions, teachers will learn about the school year cycle and associated tasks, and become familiar with instructional tools, reports, and resources in Connexus® that are used to engage and support learners. Connections’ Connexus and Curriculum course, designed for new and returning teachers, serves as an asynchronous handbook available throughout the year, providing teachers with deeper learning about effectively facilitating instruction in an online school environment.

### **Ongoing Professional Learning**

Research on effective professional learning indicates that professional development must be intensive, ongoing, and connected to practice. Teachers need to try out new ideas and strategies with their students and to reflect on the results of these strategies. Intensive professional development, especially when it includes application of knowledge to planning and instruction, has a greater chance of influencing teaching practices, and in turn, leading to gains in student learning.

Professional learning is:

- **Intensive** – Participants will identify the purpose of educational practices and examine how they can be implemented in the virtual environment. Participants will collaboratively discuss strategies that can be implemented with students.
- **Ongoing** – New instructional strategies and the latest learning science research will be connected to topics presented and discussed in prior sessions to demonstrate how specific educational practices form the “big picture” of effective instruction. Further discussion and exploration at the school level will strengthen these connections.
- **Connected to Practice** – Following each session, participants will apply what they have learned to their professional practice. They will integrate precise, targeted strategies into their planning and instruction, and reflect on the outcomes through the Teacher ePortfolio data view, a virtual portfolio which allows them to document their attendance and upload resources related to their professional learning.

Teaching in a virtual environment offers flexibility and allows for a greater level of professional learning throughout the school year. Although designated professional development days will have a specific focus, additional professional learning support will be available on a daily basis. Teachers will have multiple opportunities for seeking assistance and support with instructional strategies for engaging students and families, making decisions based on data, and completing school year cycle tasks in a timely and efficient manner. CalCA Monterey Coast will receive multiple levels of support from the Connections’ Training and Support team, including the School Support Teacher Help Desk. Connections will provide a team of specialists dedicated to meeting the needs of the school.

After completion of the foundational topics covered during their first year, teachers will participate in a systematic multi-year professional development plan. CalCA Monterey Coast takes a “flipped learning” approach to professional development which requires teachers to view a video and/or read an article or complete a pre-session activity prior to attending the synchronous professional learning session. This “flipped model” approach provides teachers with background on the session topic so that the actual session can focus on practice and application of new skills and concepts. After each session, teachers will upload an “artifact” to their professional learning e-portfolio demonstrating how they are using their professional learning to personalize instruction, implement new instructional strategies, make data-driven decisions, and reflect on their teaching practices. The e-portfolio requires teachers to provide evidence of their learning, based on the objectives of the professional development session. School leaders and supervisors provide teachers with feedback on their artifacts following the sessions.

CalCA Monterey Coast teachers will be provided with ongoing professional learning activities throughout the year, delivered by the Connections' Training Services team. Teachers will be required to attend monthly sessions virtually on topics such as:

- Using effective teaching practices and communication skills for a virtual environment,
- Implementing specific research-based instructional strategies,
- Utilizing the state and national standards to inform instruction,
- Using technology to engage students in collaborative learning activities, and
- Using data to guide instruction.

The school's leadership team will also develop a systematic plan to approach professional learning for all staff. Topics for professional learning will be selected based on school goals, student performance data, national initiatives in education, legal requirements, and research-based best practices.

Professional learning sessions include an evaluation survey to elicit teacher and administrator feedback. Audits, evaluations, and in person meetings are used to gauge the effectiveness of the training and to ensure initiatives are implemented with high fidelity.

### **Descriptions of Professional Learning Sessions (PL 100, PL 200 and PL 300)**

Second year teachers will participate in Connections' Professional Learning (PL) 100 series which focuses on:

- Making data-driven instructional decisions;
- Identifying risk factors that may require more intensive instructional interventions;
- Monitoring student performance based on data available at different points in the school year; and
- Providing teachers with strategies for giving effective feedback to students and evaluating evidence of learning.

Sessions emphasizes the "instructional shifts" required to support the level of rigor demanded by the California Common Core State Standards, next generation assessments, and college and career readiness expectations. During these sessions, teachers will be placed into virtual groups (e.g., chat pods, breakout rooms) for discussion and application activities with grade level/subject area teachers, when possible.

Teachers who have completed Professional Learning (PL) 100 will participate in the PL 200 series. The PL 200 series focuses on the learning sciences—deliberate practice, meaningful feedback, student engagement and motivation, multi-tiered intervention, and the role of mastery and transfer. PL 200 sessions engage teachers in thinking more critically about the topics presenting during the PL 100 sessions and provide additional opportunities for application of skills and strategies that impact student achievement across all grade levels and subject areas.

In the PL 300 series, teachers are grouped for professional learning by content area or grade level bands: grades K–5 are grouped by grade band K–2 and 3–5 instead of by subject area, since most teachers in these grades are teaching all subject areas. Time will also be provided during the PL 300 sessions to focus on specific content areas. A facilitator is able to guide discussions by asking targeted questions for content areas such as math and science. Teachers discuss research and strategies for topics such as: providing feedback, engagement, developing grit, and motivating students.

In addition to these required professional learning sessions, CalCA Monterey Coast will take advantage of a number of “Optional Professional Learning sessions” offered by Connections. These sessions will be made available to all teachers who seek to expand their professional knowledge. Each topic will be designed for specific content area teachers and grade level teams and will include strategies for effectively and actively engaging students in the learning process. These sessions are delivered synchronously but are recorded and available to any teachers that are not able to attend the session during the scheduled time.

### **Professional Learning Communities (PLCs)**

As a continuation of synchronous online professional development sessions, teachers will be expected to continue the conversation within their vertical and horizontal Professional Learning Communities (PLCs). This allows for true application of new strategies and resources as teachers strive to personalize instruction and make data-driven decisions.

In addition to the systematic approach toward onboarding, training, and professional learning, teachers will be able to connect to the latest educational conferences, webinars, online courses, professional organizations, and research/education updates through pertinent school news and announcements from the weekly issues provided by the Human Resources’ Communications team.



### Additional Instructional Resources

During the school year, ongoing professional development sessions will also be offered based on teacher feedback from surveys completed after professional learning sessions, and other needs as identified by the School Leadership Team at CalCA Monterey Coast. In addition, the following resources will be available to all school staff to support their professional goals and growth plans:

- **The School Interactive Program Handbook:** The Program Handbook is a resource for teachers and school personnel to use all year. It contains policies, procedures, and “how to” components that aid the teachers on a day-to-day basis. These “how to” components will also have accompanying on-line tutorial segments that visually demonstrate each process.
- **Teacher Central:** Teacher Central is a website that is easy to navigate and serves as a one-stop shop for teachers and staff to find guidance on instructional practices, professional learning, and training resources. Each section contains links to resources to support teacher effectiveness, best practices, and tools designed to personalize the learning experience for students.
- **Shared Content:** Shared Content is a collection of libraries sorted by content area that contain teacher-created instructional resources. These resources are tagged by course, grade, unit title, lesson title, key words, and other relevant data so teachers can easily upload or download them for implementation with students.
- **Instructional Support Database:** The Instructional Support database provides teachers with resources that provide students with additional practice with the skills and standards covered in the curriculum. These resources can be used with students at any intervention level when skill deficiencies become evident in English Language Arts/Reading, Math, Science, and Social Studies.
- **The Scoop:** All teachers will receive a weekly electronic newsletter that highlights improvements to the curriculum and Connexus, teacher tasks associated with the School Year Cycle, new procedures, shared tips, and community-building activities.
- Additional training in health and safety areas may be included as needed to comply with the school’s health and safety policies and/or with state law.

## **V.B COMPENSATION AND BENEFITS**

*Provide an explanation of how the school will structure employee compensation. Describe the manner by which staff members of the charter school will be covered by the State Teachers' Retirement System, the Public Employees' Retirement System, and/or federal social security; or how the school will create a system of its own to accommodate employees' retirement funding. Include the specific positions to be covered under each system and the staff designated to ensure that appropriate arrangements for that coverage are made. [Ref. California Education Code §47605(b)(5)(K) and Criteria for Review; CCR-5, §11967.5.1(f)(11)]*

The Governing Board will approve a compensation plan for teaching staff. The plan will include the base salary as well as additional compensation incentives. A salary range for the various teaching positions will be determined and re-evaluated regularly based on research of market compensation and financial considerations. Employment offers will be based on specific criteria including years of experience, education, and other relevant skills/qualifications. After the initial hire, compensation increases will be based on the factors described herein.

The staffing plan will be approved annually as part of the budget, and then in addition, the Board will also review and ratify changes to the staffing plan as necessary.

### **Teaching Positions**

Teachers may receive an annual salary increase and incentives contingent upon performance of the individual and the school. The Board will have the ability to adjust annual increase percentages in the event that the school does not meet financial expectations, state allocations are reduced, or required spending targets are not being met.

Teachers can also apply for the following career ladder roles annually. The career ladder levels which may earn additional compensation are currently as follows:

- Coordinator Teacher – base plus 4%
- Lead Teacher – base plus 9%
- Specialist Teacher—base plus 12%
- Master Teacher – base plus 15%

### **Non-Teaching and Administrative Positions**

A salary range for non-teaching positions will be determined and re-evaluated regularly based upon research of market compensation and financial considerations. Initial employment offers will be based on specific criteria, including years of experience, education, and other relevant skills/qualifications. After the initial hire, compensation increases and incentives will be based upon performance.

### Shared Services

The Board will employ a wide range of staff, who may be shared across all its other schools as needed. All staff costs are allocated to each school on a pro-rata basis in order to accurately allocate costs to each charter school operated by the corporation for the appropriate amount for staffing. Under this arrangement, staff serving CalCA Monterey Coast students may be located outside of the counties served by CalCA Monterey Coast, since staff members primarily interact with families virtually. This maximizes the school's ability to offer a wide range of online offerings and to employ the highest quality, geographically diverse and experienced staff. Administrators routinely travel between the schools. This staffing plan maximizes quality, increases course offerings, maximizes resources, allows flexibility in staffing, and assures the financial stability of the school.

### Retirement

The Board has elected to participate in the State Teachers' Retirement System (CalSTRS) for credentialed staff for the existing CalCA schools and intends to do so for CalCA Monterey Coast as well. Participants would include credentialed teachers and credentialed administrative positions which support the instructional program (eligibility for participation in CalSTRS is based on CalSTRS guidelines). The Board and administration coordinate such participation, as appropriate, with the social security system or other reciprocal systems. For participation in the CalSTRS systems, CalCA Monterey Coast makes appropriate arrangements with a county office of education to ensure proper reporting and pays that county office a reasonable fee for the provision of such services. The Orange County Department of Education currently handles CalSTRS reporting for California Connections Academy Schools.

The current option for other staff at CalCA Monterey Coast will be participation in the federal Social Security system. This option may be required by law for any staff members who are not eligible to participate in a state retirement system that is a replacement for social security (such as STRS). Staff members may also have access to other school-sponsored retirement plans according to policies developed by the Governing Board and adopted as the school's employment policies. The Board will retain the option to elect participation in the Public Employees' Retirement System, but has no plans to do so at this time.

The school and Board will also retain the right to create its own retirement system, within the parameters allowed by law, to provide equivalent retirement benefits to its employees. The Board will ensure that there is a process to identify which staff qualify for which retirement systems and ensure that all staff members are fairly covered.

## Benefits

CalCA Monterey Coast will provide an extensive benefits package which will include:

- Comprehensive health benefits (medical, dental, vision, prescription drug coverage);
- Health Care Flexible Spending Account and Dependent Care Flexible Spending Account;
- Employer paid life insurance, accidental death and dismemberment insurance, short term disability insurance, and long-term disability insurance and business travel accident insurance;
- Paid time off;
- Employee Assistance Program (resources for seniors, emotional well-being, parenting and child care, and pet care among other resources);
- Retirement savings plan with an employer match;
- Tuition reimbursement programs (currently up to \$5,250 per calendar year);
- Identity theft program; and
- Health advocate (a resource for employees to find health specialists, help transfer medical records and explain coverage among other services).

This robust benefits package will be provided to eligible full-time teachers and administrative staff. Other benefits for employees will be detailed in the Employee Handbook and Benefits Guide, published annually. The Board retains the right to review and revise the benefits offered to its employees as may be necessary and/or appropriate from time to time.

## **V.C RIGHTS OF SCHOOL DISTRICT EMPLOYEES**

*Provide, as applicable, a description of the rights of any employee of the school district upon leaving the employment of the school district to work in a charter school, and of any rights of return to the school district after employment at a charter school. [Ref. California Education Code §47605(b)(5)(M) and Criteria for Review; CCR-5, §11967.5.1(f)(13)]*

### **Return Rights**

If an employee leaves district employment to work at the charter school, the collective bargaining agreements and Board policies of that district will govern the return rights of such employees.

CalCA Monterey Coast may negotiate with a district to “loan” employees who would then retain their status and benefits through the district, but who would work under CalCA Monterey Coast’s employment policies. Neither the district nor the charter school are obligated to agree to such a loan, but may do so if mutually agreeable. If a district employee is working at CalCA Monterey Coast, the school will notify the district prior to March 15 of each year, if any such employee is not going to be re-employed by the school the following year.

### **Exclusive Public Employer**

The non-profit corporation, California Online Public Schools (CalOPS) which will operate CalCA Monterey Coast will be deemed the exclusive public school employer of the employees of the charter school for the purposes of Educational Employment Act [Chapter 10.7 (commencing with section 3540) of Division 4 of Title 4 of Title 1 of the Government Code] [Ref. California Education Code section 47605(b)(6)].

## **V.D HEALTH AND SAFETY**

*Describe the procedures that the school will follow to ensure the health and safety of students and staff, including how the school will provide for proper immunization, as well as vision, hearing, and scoliosis screening for students; and the steps the school will take to ensure that criminal background checks are collected from all school personnel. [Ref. California Education Code §47605(b)(5)(F) and Criteria for Review; CCR-5, §11967.5.1(f)(6)]*

*Describe how the school will maintain safety on the school campus, including, but not limited to, disaster preparedness, visitor procedures/security and emergency drills. Also describe how the school will maintain a learning environment free of sexual harassment in accordance with applicable federal requirements. If district facilities will be requested for use by the charter school, include a statement that the school will require that all students and parents comply with school district safety policies on the school campus, and that the school will enforce the policies to the full extent possible. Describe how staff will receive training and how safety-related information will be communicated to parents and students.*

The Governing Board for CalCA Monterey Coast has adopted a comprehensive set of health, safety, and risk management policies, which will be implemented by the school. These policies will be reviewed regularly by the Governing Board to ensure they meet the needs of the school.

The policies and procedures address and/or include, but are not limited to, the following topics:

- A requirement that all enrolling students provide records documenting immunizations to the extent required for enrollment in an independent study program of a California public school;
- Policies relating to preventing contact with blood-borne pathogens and providing training to employees on such prevention;
- A policy regarding staff requirements and training in CPR, first aid and/or emergency response;
- Policies relating to the administration of prescription drugs and other medicines;
- A policy that if the school has a permanent classroom facility, it will have received state Fire Marshal approval and will have been evaluated by a qualified structural engineer who has determined that the facilities present no substantial seismic safety hazard, and that the school will maintain appropriate facility compliance documents on file;
- A policy establishing that the school functions as a drug, alcohol, and tobacco free workplace;
- A requirement to comply with the employee criminal background check requirements for employees, contractors, and volunteers, per California Education Code sections 44237, 45125.1 and 35021.1;
- A policy regarding health screenings for students, such as vision, hearing, etc.;
- Policies regarding visitors to any school facility and/or school activities, and other school security issues;
- Policies to ensure the school is in compliance with federal sexual harassment prevention guidelines and is maintaining a learning and work environment that is free from sexual harassment;
- Policies regarding safe student use of the Internet and prevention of cyberbullying; and
- A policy requiring mandatory annual training for school staff, and other persons working on behalf of the school who are mandated reporters, on child abuse, which shall occur within the first six weeks of each school year, or within the first six weeks of a person's employment if employed after the beginning of the school year, in accordance with the requirements of AB 1432 and per California Education Code section 44691.

These policies will be incorporated, as appropriate, into the school's student and staff handbooks and will be reviewed on an ongoing basis in the school's staff development efforts and Governing Board policies. Staff members will receive regular training regarding safety issues, including Internet safety, child abuse and harassment prevention. The Health and Safety Policies will be available at any time from the school upon request. The school will post information about Title IX on its website, in accordance with Education Code 221.6. In addition, the Governing Board has adopted a Suicide Prevention Policy.

## **V.E DISPUTE RESOLUTION**

*Provide a description of the procedures to be followed by the charter school and the entity granting the charter to resolve disputes relating to provisions of the charter. Describe how the costs of such a dispute resolution process, if needed, will be funded. [Ref. California Code §47605(b)(5)(N) and Criteria for Review; CCR-5, §11967.5.1(f)(14)]*

### **Disputes with the Authorizer**

In the event of a dispute between CalCA Monterey Coast and PES regarding the terms of this charter or any other issue regarding the school and district relationship, both parties agree to apprise the other, in writing, of the specific disputed issue(s). In the event the initiating party believes the dispute relates to an issue that could potentially lead to revocation of the charter, this will be specifically noted in the written dispute statement.

Within 30 days of sending written correspondence, or longer if both parties agree, the Executive Director of CalCA Monterey Coast and the PES Superintendent, or their designees, will meet and confer in an attempt to resolve the dispute. The designees must be identified and confirmed in writing ahead of time, and the parties' initial responses to the dispute should be included in this written correspondence. If this joint meeting fails to resolve the dispute, the charter representative and the district representative will meet again within 15 days, or longer if both parties agree, to identify a neutral, third party mediator to assist in dispute resolution. The mediation will incorporate informal rules of evidence and procedure unless both parties agree otherwise. Unless jointly agreed, the process involving assistance of a third party mediator will conclude within 45 days from selection of the mediator.

All mediation costs and all other costs associated with dispute resolution will be shared equally by CalCA Monterey Coast and PES, except that each party will bear and be solely responsible for all of its own attorney costs and fees.

In the event the third-party mediation process does not result in resolution of the dispute, both parties agree to continue good faith negotiations. If the dispute remains unresolved, either party may pursue any remedy available under law. If the district indicates in writing that the violation constitutes a severe and imminent threat to the health and safety of the school's pupils, the district reserves the right to take any action it deems appropriate to ensure the safety of students. The school reserves the right to seek legal redress for any such actions under the law.

The school is entitled to receive funds throughout the term of the charter. In the event of a dispute between the school and PES, PES will not be permitted to withhold, as a remedy or otherwise, any funds received on behalf of the charter school.

This dispute resolution process may be clarified as needed. Any and all necessary additional details may be included in the Memorandum of Understanding (MOU) with PES (See Exhibit G).

### Internal Disputes

In addition to these processes, the Governing Board will develop, adopt, and maintain updated policies and procedures for resolving internal and external disputes and grievances. These procedures will be included in the School and Employee Handbooks. The school will adopt a Uniform Complaint Procedure, the school's formal complaint procedure, which will be posted on the school website and referenced in the School Handbook (see Exhibit B).

PES agrees to refer all complaints regarding the school's operations to the CalCA Monterey Coast staff and/or Governing Board for resolution in accordance with the school's adopted policies.

All disputes or complaints that are not resolved by the school in accordance with its complaint procedures and which are related to the school's provision of Special Education services, including complaints regarding the initial placement or enrollment of students with disabilities in the school, will involve the school's SELPA, which is expected to be the Tulare County/District SELPA.



## V. STUDENT ADMISSIONS, ATTENDANCE, AND SUSPENSION / EXPULSION POLICIES

### VI.A STUDENT ADMISSION POLICIES AND PROCEDURES

*Describe the policies and procedures the school will develop and implement for the admission and enrollment of students, including any proposed timetable or calendar and the extent to which the school will develop a random lottery process, where applicable. Include assurance that the charter school will be nonsectarian in its programs, admission policies, employment practices, and all other operations, and will not charge tuition nor discriminate against any student based on ethnicity, national origin, gender, or disability. [Ref. California Education Code §47605(b)(5)(H), §47605(d) and Criteria for Review; CCR-5, §11967.5.1(f)(8)]*

#### Outreach and Recruitment

CalCA Monterey Coast will actively recruit families that represent the full cultural, demographic, and socioeconomic range of California communities. In order to leverage the additional visibility of other CalCA schools and to address the mobility of 21<sup>st</sup> century families, the school may use the name “California Connections Academy” or “CalCA” for outreach purposes.

CalCA Monterey Coast will use a variety of means to inform families about its services and provide them an opportunity to enroll including:

- **Website:** Connections, as one of the services provided to the school, will maintain a website ([www.connectionsacademy.com](http://www.connectionsacademy.com)) with a special link to CalCA Monterey Coast school information. The website will contain information about the school, its learning approach, and its curriculum. The site will also contain a regularly updated set of Frequently Asked Questions and their answers. The site will include enrollment information and procedures, required postings such as the LCAP and a link to the SARC, and many useful tools for prospective students and their families.
- **Telephone/e-mail information service:** CalCA Monterey Coast will, through its contract with Connections, maintain a toll-free information line and an email information service to answer parents’ questions about the charter school.
- **Information Sessions:** CalCA Monterey Coast plans to conduct multiple in-person and/or online information sessions for families throughout the counties served to assure that families from a variety of communities are able to attend. Some or all of these Information Sessions may be virtual, meaning that families attend the session from home via their computers. CalCA Monterey Coast will use these sessions to provide a complete array of information about its program including its curriculum, teaching methods, technology resources, and testing requirements.

- **Direct outreach:** CalCA Monterey Coast may conduct direct mail campaigns announcing the charter school to families with children throughout Santa Cruz County and its contiguous counties. In a typical mailing, CalCA Monterey Coast will send out a postcard inviting parents to attend the various types of information sessions, visit the website, and/or contact the call center. CalCA Monterey Coast will also use email to communicate with people who approach CalCA Monterey Coast and request information. CalCA Monterey Coast may also use e-mail to supplement or replace its physical mail campaign. Email correspondence will include valuable information to help prospective families understand if the program is a right for them.
- **Community and youth services partnerships:** As part of its outreach process, CalCA Monterey Coast will provide information about the charter school to community, family, and youth-serving organizations through community outreach activities; seek partnerships with parent groups, and organizations for young actors, dancers, and athletes.
- **School district referrals and outreach:** CalCA Monterey Coast will take every opportunity to brief school district administrators and guidance personnel on CalCA Monterey Coast as an alternative for students who might benefit from individualized instruction in a non-classroom setting.
- **Media outreach:** CalCA Monterey Coast will make use of paid media, broadcast announcements and/or digital advertisements. The school will also take full advantage of the local media's interest in raising awareness of the California Connections Academy Schools, celebrate the accomplishments of the students and teachers.
- **Referrals/Word of Mouth:** As CalCA Monterey Coast grows, it anticipates that a increasing number of families who come to the school enroll due to positive feedback received from their families, community members, and traditional school leaders.
- **Digital Media:** CalCA Monterey Coast will link to leading internet search engines with local reference capability to help families looking for a virtual school option to find this high-quality school. The school will benefit from Facebook, Twitter, and other social media campaigns to interact with families with an interest in learning from home.

### **Nondiscrimination in Admissions**

CalCA Monterey Coast will not discriminate against pupils on the basis of gender, gender identity, gender expression, race, ethnicity, religion, national origin, immigration status, ancestry, creed, pregnancy or parenting status, marital status, sexual orientation, or physical, mental, emotional, learning disability or handicap, or any other characteristics referenced in California Education Code section 220 in its education programs or activities including its admissions policies and procedures.

### **No Tuition**

As a public school, CalCA Monterey Coast will not charge tuition or any fees that are prohibited. Outreach communications and the School Handbook will inform families that the school is tuition-free. The School Handbook (see Exhibit B) will contain Board-approved policies regarding fees including statements about any allowable fees, as well as explanations about how the school provides a free public school program.

### **Non-sectarian**

As a public school, the charter will be non-sectarian in its programs, admission policies, employment practices, and all other operations.

### **Place of Residence**

Admission to the charter school is not determined according to the place of residence of any pupil, or his or her parent or guardian, within California, except for such restrictions or preferences that are required or allowed by law. As an independent study school, geographic restrictions are required and will be followed by the school. Students are considered eligible to attend if they provide evidence of residency within the counties served by the school. Students are eligible to enroll in CalCA Monterey Coast if they reside in one of the following counties: Santa Cruz, San Mateo, Santa Clara, Monterey, and San Benito.

### **Admission Methods and Eligibility Criteria**

Through its recruitment/marketing and application guidance activities, CalCA Monterey Coast will regularly disclose full details about its program and encourage families to carefully consider its academic demands and practical implementations before applying. CalCA Monterey Coast will also provide tools (such as an online self-quiz, contact with other parents and contact with a CalCA counselor if desired) to help parents decide whether CalCA Monterey Coast is truly the right fit for their children and themselves.

Admissions requirements include the expectation that parents complete all enrollment and placement activities in a timely and complete fashion. This includes signing and upholding all necessary school-family agreements (such as an Independent Study Master Agreement as shown in Exhibit C and/or the PLCA in Exhibit D). Students are subject to the age and geographic restrictions for California public school admission and funding. The school's policies regarding age eligibility will be included in the School Handbook (see Exhibit B).

### Timetable/Lottery

As a non-classroom based school, CalCA Monterey Coast will be able to accommodate all eligible students who may wish to attend. Enrollment for the following school year generally opens on or around March 1. The CalCA Monterey Coast enrollment team will assist parents in completing the required enrollment tasks and in meeting any state-mandated enrollment requirements. On or around June 1 of each year, parents will be able to confirm their intent to enroll in the school, and the student's enrollment can be completed. However, if demand for enrollment exceeds the school resources, the Board will ensure that students are admitted in a fair and transparent manner. In order to accomplish this, the Board may set an enrollment cap and then develop and implement a detailed public lottery procedure in accordance with California Education Code section 47605 (d)(2)(B). The Board also would address any applicable federal requirements for the lottery process.

In accordance with California Education Code section 47605 (d)(2)(A) and section 47605 (d)(2)(C), CalCA Monterey Coast, in partnership with PES, will make every reasonable attempt to accommodate all the students who wish to attend the charter school. Since the school anticipates that it will be able to accommodate all eligible students who apply during the enrollment window, development of a more detailed public lottery process is not necessary at this time. If the school adopts a lottery process, it will conform to all applicable federal and state requirements regarding how to weight or exempt various types of applicants and how to hold the lottery.

Once enrolled, students will be considered "existing pupils of the charter school" for purposes of any lottery. They therefore have admission priority as enrolled students and are exempt from any lottery, as long as they submit all updated registration documents in a timely manner and continue to meet the school's eligibility requirements in subsequent enrollment periods.

### Enrollment Window

The Board may annually select a date to close enrollment to the charter school. Typically, enrollment for the school year will close shortly after the beginning of the second semester. The school reserves the right to admit a student to the school after enrollment closes, upon approval of the exception by the Executive Director or designee. For example, students moving from another geographic area who attend a California Connections Academy school may be allowed to transfer after enrollment has closed.

## **VI.B NON-DISCRIMINATION AND RACIAL BALANCE**

*Describe how the charter school will ensure a racial and ethnic balance among its students that is reflective of the general population residing within the territorial jurisdiction of the school district to which the charter petition is submitted. [Ref. California Education Code §47605(b)(5)(G) and Criteria for Review; CCR-5, §11967.5.1(f)(7)]*

The CalCA schools typically reflect the statewide racial and ethnic balance, and CalCA Monterey Coast will actively work to do the same. Through extensive community outreach and full disclosure about the school's program, CalCA Monterey Coast expects to attract those students and families who are most committed to student success in a virtual school setting. The eligibility requirements for admission do not discriminate, and allow any family access to the school.

In addition, CalCA Monterey Coast will develop administrative procedures to ensure that the school's outreach, recruitment, and enrollment procedures do not discriminate against students based on physical, mental, emotional, learning disability or handicap, or any other legally protected classification. As part of that process, CalCA Monterey Coast will provide parents with a clear and accurate picture of the CalCA Monterey Coast learning experience so they can make the most appropriate choices for their children.

CalCA Monterey Coast will utilize a broad reaching student recruiting effort, thereby ensuring outreach to families with a wide variety of racial, ethnic, and socioeconomic backgrounds. In addition, certain subgroups may be targeted for extra recruitment efforts in order to achieve a pool of potential students that reflects a balanced student population. Partnerships and outreach efforts using a variety of community and youth organizations aid in this process.

Connexus allows accurate collection and analysis of the school's demographic data. The data collected in this way will be used to generate reports to the Board, PES, and the California Department of Education. It may also be used to evaluate and modify the school's outreach and recruiting strategies when necessary.

## **VI.C PUBLIC SCHOOL ATTENDANCE ALTERNATIVES**

*As applicable, describe the public school attendance alternatives for students in the district who choose not to attend the charter school. At a minimum, specify that the parent or guardian of each student enrolled in the charter school will be informed that the students have no right to admission in a particular school of any local education agency as a consequence of enrollment in the charter school, except to the extent that such a right is extended by the local education agency. [Ref. California Education Code §47605(b)(5)(L) and Criteria for Review; CCR-5, §11967.5.1(f)(12)]*

District students who choose not to attend the charter school may attend other district schools or may pursue an inter-district transfer in accordance with existing district enrollment and transfer policies. More information about district attendance alternatives is available from the district administrative offices. No PES student will be required to attend CalCA Monterey Coast.

If a pupil who is subject to compulsory full-time education pursuant to Education Code § 48200 leaves the charter school without graduating or completing the school year for any reason, CalCA Monterey Coast will notify the Superintendent or designee of the school district of the pupil's last known address within 30 days, and shall, upon written request, provide that school district with a copy of the cumulative record of the pupil, including a transcript of grades or report card, and health information.

Students enrolled in the charter school will have no right to admission in a particular school of any local education agency as a consequence of enrollment in the charter school, except to the extent that such a right is extended by the local education agency.

#### **VI.D SUSPENSION/EXPULSION PROCEDURES**

*Describe the procedures by which students can be suspended or expelled. [Ref. California Education Code §47605(b)(5)(J)] Include a preliminary list of the offenses for which students in the charter school must (where non-discretionary) and may (where discretionary) be suspended or expelled, respectively. Identify the procedure by which students can be suspended or expelled and the process by which parents/guardians and students will be informed about the reasons for any such actions and their due process rights. Explain how the charter school will take into account the rights of students with disabilities in regard to suspension and expulsion. Outline how policies and procedures regarding suspension and expulsion will be periodically reviewed and, when necessary, modified. Outline the process for notifying the school district in the case of suspension or expulsion of a student. [Ref. Criteria for Review; CCR-5, §11967.5.1(f)(10)]*

CalCA Monterey Coast will establish suspension and expulsion policies. As part of the enrollment process, and annually thereafter, parents/guardians will check a signature box confirming they have been provided access to and agree they are bound by the terms of the handbooks, including suspension/expulsion procedures.

Handbooks (General and supplement applicable to CalCA Monterey Coast—see Exhibit B) will be available in Connexus Education Management System (EMS) and updated as needed. The policies may be modified at any time, as necessary, by action of the Board. The school's discipline, suspension, and expulsion policies will be in accordance with students' rights and with applicable law.

As a charter school, the delineated suspension and expulsion offenses contained in California Education Code section 48900 et. seq. are not applicable to the school. However, the Board will review those sections of California Education Code and utilize similar guidelines when they are deemed appropriate to the desired disciplinary environment of the school.

#### **Code of Conduct**

Appropriate conduct will be expected of all students. The student's code of conduct will be explained in the School Handbook (see Exhibit B) and will include steps to be followed in the event of misbehavior.

### Academic Honesty

Academic Honesty will also be detailed in the General Handbook and California Connections Academy Schools Handbook Supplement (see Exhibit B). The school regards academic honesty as key to its mission, and academic honesty is essential in the virtual environment. It is expected that students adhere to the Honor Code throughout the year and that all schoolwork submitted in order to meet course or class requirements represents the original work of the student.

All individuals involved with the school will be important contributors to upholding the academic honesty of the school and will be held accountable for violations of the principles of academic integrity. Any form of academic dishonesty may cause a student to be subject to disciplinary action. The following principles are critical to maintaining academic honesty:

- Students must not submit work of any kind that is not their own work.
- Students must not plagiarize in any work (written, multimedia, oral, creative, etc.).
- Students must not post assessments, assignments, answers to assessments or assignments, or any other Connections curricular materials on any media that can be seen by other students or other third parties.
- Students must not give or receive unauthorized assistance on assessments.
- Learning Coaches must not give excessive assistance on assessments.
- Students must not present any forged document or signature to the school.
- Learning Coaches must not present any forged document or signature to the school.

### Board Policies

CalCA Monterey Coast will follow formal due process procedures to deal with the discipline of students. Students will be guaranteed due process of law as required by the Fourteenth Amendment to the Constitution. The discipline policies will be developed to identify the types of conduct subject to discipline, to offer an opportunity for a hearing in which the student may present evidence to defend his/her actions, and to ensure due process for the student. The School Handbook (see Exhibit B), including the discipline policies will be approved by the Board and will be reviewed regularly. The Board will review the policies to be sure they are within all current legal guidelines and that they are consistent with the school's mission and educational program.



Suspensions or expulsions for children designated as exceptional will follow all appropriate state and federal policies, regulations, and laws. If a student with a disability violates a code of conduct, they will be disciplined according to the discipline measures described herein. Upon subsequent violations that result in suspensions that exceed 10 days per school year or upon any recommendation for expulsion, the school will determine if the behavior manifested from the student's disability. If the school determines that the violation is not a manifestation of the student's disability, the school will apply the discipline procedures to the student in the same manner and for the same duration as the procedures would be applied to students without disabilities. However, if it is determined that the violation manifested from the student's disability, the school will conduct a functional behavior assessment and develop a behavior plan to address the behavior violation so that it does not recur.

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, but 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.

#### **Suspension (not more than nine days)**

The Executive Director or grade level principal, following the due process protocol, may suspend students for up to nine days. A suspension consists of removal or restriction of access to school activities including access to Connexus. The student will be expected to continue their schoolwork during this time. Violations that may lead to suspension include, but are not limited to the following breaches of conduct, whether committed electronically or in person:

- Bullying or harassment,
- Abusive or threatening language or conduct,
- Vandalism,
- Theft and robbery,
- Harassment or sexual harassment,
- Violation of academic honesty code,
- Unexcused absence due to truancy,
- Violation of acceptable use policy, and
- Repeated violations of any discipline issue.



The due process protocol that will be included in School Handbook includes first convening an informal hearing with the student, parent/caretaker, grade level principal or assistant principal, and other staff members as appropriate. The grade level principal (or assistant principal if designated) will inform the student and parent/caretaker of the allegations and an explanation of the evidence that supports the allegations. The student will be provided with an opportunity to present his or her version of the occurrence.

If the principal (or assistant principal if designated) determines that the incident(s) justifies suspension, written notice will be provided to the student and his/her parent/caretaker. The student will be provided all due process as required by law. The principal (or assistant principal if designated) has the authority to make a decision to suspend a student for up to nine days. The exact protocols to ensure due process are subject to change via changes to the Board-approved School Handbook and/or Board-approved discipline policies.

### Expulsion

For more serious violations (see below) or for conduct that warrants suspension of 10 or more days or expulsion, the following process is used. A student may be expelled by the Executive Director after providing an opportunity for a hearing before a neutral school official appointed by the school's Governing Board (the "Hearing Officer"). At a minimum, the Hearing Officer will comply with the "neutral officer" requirements under Education Code section 47605(b)(5)(J)(ii)(II). Suspensions or expulsions for children designated as exceptional will follow all appropriate state and federal policies, regulations, and laws.

Violations that may lead to expulsion include, but are not limited to any behavior that indicates that a student is a serious threat to the safety of others in the school, including possession of firearms, dangerous weapons, bombs, or explosives, criminal behavior, arson, possession of or sale of controlled substances or paraphernalia at the school (including through online communication) or at any school-sponsored event.

The due process protocol for expulsions as described here will be incorporated in the School Handbook. The process starts with the grade level principal. If the grade level principal believes that a student has committed an offense that may lead to expulsion, the principal may suspend the student for up to nine days pending further proceedings and/or a hearing. During this time, the principal will refer the case to the Executive Director, who may then request a hearing by the Hearing Officer to discuss the possible expulsion of the student. Upon a recommendation for expulsion, the Executive Director or grade level principal will determine whether the suspension should be extended while the expulsion process continues.

If the Executive Director determines that a student's conduct may warrant expulsion, the Executive Director will provide timely written notice to the parent/caretaker of the student of its determination and an explanation of the student's basic rights, including the right to a hearing.

Such notice includes:

- (1) the date, time and location of hearing;
- (2) a description of the incident(s) and charge(s) that is are subject of the hearing;
- (3) a description of student's right to a fair opportunity to present their version of the incident(s), present testimony and evidence, call witnesses, cross-examine witnesses and be represented by counsel or an advocate;
- (4) notice that the student and/or Caretaker have a right to review the student's school records prior to the hearing; and
- (5) a description of the hearing process, which shall be adjudicated by a neutral officer, and explanation of the consequences of an expulsion.

At this hearing, the allegations and supporting evidence will be reviewed. As described in the above notice, at the hearing, the student will have the right and a fair opportunity to present their version of the incident(s), present testimony and evidence, call witnesses, cross-examine witnesses and be represented by counsel or an advocate.

The Hearing Officer, through the Executive Director, will provide notification to the student and parent/caretaker of the Hearing Officer's decision and discipline determination. The decision of the Hearing Officer is final.

The exact protocols to ensure due process for expulsions are subject to change via changes to the Board-approved School Handbook and/or Board-approved discipline policies.

### Due Process

The School Handbook (see Exhibit B) and Board policies will lay out the due process for students with disciplinary issues. The discipline process will have three levels: Warning, Suspension, and Expulsion. A warning will be issued when a student has demonstrated a breach of conduct but is not as serious as those listed for suspension or expulsion. A warning will ultimately result in written documentation. Due process for suspensions and expulsions will include informing students and parents of the charges, of their rights, and of the due process protocols, holding hearing(s) with appropriate persons/parties, allowing the student and parents to present their version of the occurrence, and written documentation of the results. Examples of the current due process protocols are described previously in this application.

In compliance with applicable law, no student shall be involuntarily removed (e.g., disenrolled, dismissed, transferred, or terminated) by the school unless the parent or guardian of the student has been provided written notice of the intent to remove at least five schooldays before the effective date of the action. The written notice shall inform him or her of the right to request a hearing before the effective date of the action. If a hearing is requested, the student will remain enrolled until the school issues a final decision.

### Notification

The Board will be notified, in closed session or confidential correspondence as appropriate, of any expulsion decisions. Designated school district staff will be notified in a timely way of any expulsions by a designated member of the CalCA Monterey Coast staff. In addition, the school will include data regarding suspensions and expulsions in reports to the state. Documentation of student discipline will be maintained in the student's school records.

## FINANCIAL PLANNING, REPORTING, AND ACCOUNTABILITY

### VII.A BUDGETS

*Provide a detailed proposed first-year operational budget, including startup costs, that includes: Reasonable estimates of all anticipated revenues and expenditures necessary to operate the school – including special education; Budget notes that clearly describe assumptions or revenue estimates, including, but not limited to the basis for average daily attendance estimates and staffing levels, including salary and benefit assumptions. Also provide cash flow and financial projections for the first three years of operation; and plans for establishment of a reserve. [Ref. California Education Code §47605(g) and Criteria for Review; CCR-5, §11967.5.1(c)(3)(B)]*

CalCA Monterey Coast will annually develop a budget which will be submitted each year of operation to PES and the County Office of Education by the deadline established by the state. This deadline may be earlier if mutually agreed to, but in no case will it be later than July 1 each year, in accordance with California Education Code section 47604.33. CalCA Monterey Coast adheres to the charter school requirements of the state's Local Control Funding Formula (LCFF) statutes including compliance with LCAP requirements (see also Section VIII.A.).

### Budget Development

The Executive Director and the school's Director of Business Services, will prepare and submit a proposed budget for the upcoming fiscal year to the Governing Board at a public meeting. The Board will review and modify the budget as needed. Following Board approval, this preliminary budget will be submitted to PES staff in keeping with timelines outlined in the MOU and any legally required timelines. A copy of the preliminary budget will also be submitted to the County Office of Education following approval by the Governing Board. A revised school budget will typically be developed, adopted, and submitted to PES following the start of the school year.

### **Fiscal Year**

The fiscal year for CalCA Monterey Coast will be July 1 through June 30, as stated in the corporation Bylaws (see Exhibit E).

### **Budget Highlights and Assumptions**

The attached three-year budget, which starts with the 2019-20 school year, demonstrates a school with sound financial planning (see Exhibit H).

### **Cash Inflows and Reserves**

Revenue is based on conservative estimates of available ADA funding and conservative attendance estimates. Enrollment figures are based on the projections for school growth based upon initial enrollment projections for CalCA Monterey Coast, enrollment history for California Connections Academy Schools, and thorough market analysis.

Under the state Local Control Funding Formula (LCFF), the general purpose revenue includes three sources: the Education Protection Act funds, the state aid portion, and the local in-lieu of property tax payments. The LCFF revenue amount for the 2019-20 school year budget has been derived from an LCFF calculator which uses estimated state certified target per pupil funding rates, the anticipated annual cost of living adjustment, and the school's projected demographics.

Estimates of the rates and the methods of calculation of LCFF revenue will be obtained from agencies such as the California Department of Education, the California Charter School Association, the Fiscal Crisis and Management Assistance Team, and School Services of California. Lottery funds are estimated conservatively. CalCA Monterey Coast should be eligible for Federal Title funds and plans to access these programs annually after the first year in operation. Assuming the school is a member of the Tulare County/District SELPA as the school intends, the school will receive state and federal special education revenue directly from the SELPA. If other state categorical programs are available, the school will apply for those whenever eligible. Current funding sources outside of LCFF revenues are included in the budget (see Exhibit H).

## Cash Outflows

Expenditure distributions are designed to ensure that the majority of funds are spent on instruction related costs, and will therefore meet the requirements for full funding.

The program provides for the following:

- **Teaching and administrative staff:** Staff budgets and staffing numbers have been prepared to meet requirements for full funding. This budget provides for a student to teacher ratio of 25:1 or less. This ratio aligns with the state's charter school pupil-to-teacher ratio for an independent study program. Should these ratios require that an adjustment be made, and the Governing Board reserves the right to apply for a waiver with the appropriate agencies. Complete benefit packages will be assumed at approximately 24.5% of salary. Payroll taxes and STRS contributions are included, using the state's current STRS contribution rate chart. The costs for teaching and administrative services, including salary and benefits will be allocated as appropriate with CalCA Monterey Coast's sister schools through the employment arrangements.
- **High quality instructional program including materials and technology tools:** Costs for these items will be determined through the Statement of Agreement and the annually adopted fee schedule for instructional materials supplied by Connections. A number of the school's expenses will be directly drawn from the fee schedule. The fee schedule will include fees for all of the instructional materials. In addition to complete lesson plans provided for every subject, additional materials will be provided, which may include such items as high-quality electronic textbooks, online licensed content, interactive lesson components, synchronous instruction tools, science and art kits, and state of the art technology training, test preparation and assessment tools. Note that due to fluctuations in available funding in California and funding allocation requirements, certain adjustments may have to be made to the regular Connections program. These will be determined by agreement between the Governing Board and Connections. Connections will provide Connexus that includes, among other things, a student information system, lesson scheduling tools, accountability tools, webmail, instant messaging, chat, video and audio streaming for selected lessons and a school and local activities message board/forum.

- **Facility:** The school will be sharing office space with its sister schools in order to establish both operational and financial efficiency. This administrative facility will include offices for the site administrator and administrative staff, as well as conference rooms, student records storage and other storage space. A remote virtual teaching model will be used for the majority of the instruction. In this model, subject to approval by their grade level principal, most teachers will spend time working at home (elsewhere other than the office) in accordance with the school's work at home policy. CalCA Monterey Coast Academy will provide Internet access and technical support for staff while they are working from the office, as well as laptop computers that can be used from the office or from home. Due to the shared services model employed to more efficiently serve students, the school will use a cost allocation model with the other CalCA schools to offset the cost of its administrative office facility. The total office space rental costs will include the pro-rated square footage costs, while pro-rated utilities, phone and internet are budgeted separately.
- **Special Education:** The CalCA Monterey Coast budget will include expenditure items to provide for special education staff and services to fully meet the needs of students with disabilities. The charter plans to be an LEA in the Tulare County/District SELPA and will work with that SELPA regarding fiscal arrangements and reporting.
- **Administrative costs:** The school will have a full range of administrators and administrative support staff as employees, and in addition, the school plans to contract with Connections for many administrative services. These services will be shown in categories in the budget and will include such general administrative services as enrollment, records management, human resources, payroll services, accounting, facility management, regulatory reporting support, general administration and oversight, marketing services, financing services, student and parent satisfaction assessment, Board support and resource services, authorizer liaison services etc. In addition to the high-quality, turn-key educational program, Connections will offer a wide range of administrative support services to assist the school. Examples of items covered in the educational administrative services are: education program design, analysis, and revision; curriculum planning and selection services; school handbook development; professional development planning; school leader development; and so forth.
- **Other operational costs:** The school has budgeted for many other expenses necessary for school success such as teacher professional development, copier costs, student testing and assessment, loaned technology for students, technology support costs, insurance, audit fees, legal fees, banking costs, dues and memberships, STRS reporting fees, Board training, district oversight fees, and so forth. Each of these is shown in detail on the budget. The audit fees will include the cost of annual tax filing for the non-profit corporation.

- **Oversight fees:** Expenses related to the sponsoring District include the 1% District oversight fee. The details of the fiscal arrangement and the distribution of responsibilities are included in the MOU with PES (See Exhibit G), along with any District services that may be agreed upon on a fee-for-service basis. The District shall charge CalCA Monterey Coast for supervisory oversight of CalCA Monterey Coast, up to any maximum permitted by law (currently described and limited in Education Code § 47613), currently set at 1%. CalCA Monterey Coast acknowledges that the District's actual costs in conducting its oversight obligations could meet or exceed the maximum percentage permitted by law and the District shall not be required to submit documentation of its actual oversight costs.

The budget will be prepared to maximize cost efficiency and to leverage the resources available through CalCA Monterey Coast's relationship with Connections, as well as through the relationship with the other California Connections Academy Schools, with the goal of maximizing the amount of funds that are spent on items that directly support student learning. All items in the budget will be directly linked to essential elements of the educational program described in this charter and are components of a successful virtual school model. The majority of the school's resources will be directed to the places where they will have the most impact on students (i.e., applied to the teaching staff and to the curriculum).

### Overall Cash Flow

Connections will provide human resources, administrative, financial, accounting, and payroll services. The services to be provided will be explained in the Statement of Agreement between CalCA Monterey Coast and Connections. Since this will be provided as a turn-key program, many of the school's expenses will be either paid to Connections (such as fees for access to Connexus, curriculum, and so forth), will be paid for salary and benefits under the allocation model with the other CalCA schools, or will be reimbursed by the school to Connections (such as travel, facility costs, and so forth). The charter school will be invoiced monthly by Connections for all of the agreed upon costs. The invoices will be reviewed by the Governing Board Treasurer and the Director of Business Services prior to payment to Connections and will also be approved by the full Governing Board as part of the regular Board agenda.

Connections has considerable experience supporting public virtual schools and has gained expertise in dealing with the unique aspects of public school funding including funding in California. In order to protect the CalCA Monterey Coast charter school from experiencing cash flow problems as a result of delays in state or local funding, arrangements will be made to allow the charter school to pay the invoices *only if the school has sufficient funds available at that time*. The school must pay for services rendered as soon as funds become available, but there will be no demand for payment if sufficient funds have not yet been received by the school. Therefore, due to this favorable arrangement between the charter school and its service provider, any additional delays in state payments, such as have been imposed in the past by California on all public schools, will have limited negative effect on the charter school.



The Governing Board and school leadership are aware of the challenges of the state's past multiple and complex deferrals of payments which may be applied to public schools including charter schools. However, for the reasons listed herein, rather than needing to develop detailed cash flow analyses and seek outside financing, the charter school will rely on its arrangement with Connections to provide short term financing during times when cash is not received from the public revenue sources. This ability to obtain financing at a reasonable rate is one of many advantages offered to the school through its contract with Connections.

Due to potential variability of state and federal funding and the annual expenditures of the charter school, CalCA Monterey Coast and Connections will agree to negotiate, in good faith, a reduction in the fees, as needed. If the school's expenditures are projected to exceed its funding and would result in a cumulative net asset deficit on its audited financial statements, with the negotiated reduction in fees, the school will maintain overall positive net assets. Any reduction in fees will be limited to the year for which such reduction is negotiated, except if otherwise agreed.

### **Funding Determination**

As is required of all non-classroom-based programs, CalCA Monterey Coast will submit a funding determination application to the CDE by the mandated deadlines. CalCA Monterey Coast will request a multi-year funding determination by the Advisory Commission on Charter Schools, which is expected to initially give a two-year funding determination for the new school, and which would then allow for full funding for the first two years of operation. During the second year in operation, the school will apply for a funding determination for future years. The budgets will always be prepared to meet or exceed all of the tests required for full funding. In the event that full funding is not granted at any point, the school will work with the California Advisory Commission on Charter Schools and the CDE staff to modify the budget so that the school can receive full funding.

Alternatively, the school may modify its revenue and/or expenditure assumptions to ensure a balanced budget. In the event that full funding is not granted, CalCA Monterey Coast will submit a revised budget to PES for approval July 1 or the following fiscal year. The CalCA Monterey Coast educational program, as outlined in the charter petition, will be of the highest quality. CalCA Monterey Coast will be committed to providing this full program to its students and also to ensuring that funds are spent to carry out the mission of the school.



## **VII.B FINANCIAL REPORTING**

*Describe the systems and processes by which the school will keep track of financial data and compile information needed for the annual statement of receipts and expenditures that is due to the school district.*

### **Financial Reports**

CalCA Monterey Coast's Director of Business Services will provide regular financial reports to the Board. Following review by the Board, financial data will be reported to the District and the County Office of Education in a manner and timeline detailed in the MOU and in accordance with existing charter school law and district and state policy.

In accordance with current legally mandated timelines, the first interim report, which reports on budget and actuals through October 31, will be submitted annually to the District and the County Office of Education no later than December 15 each year. The second interim report, which reports on budget and actuals through January 31, will be submitted annually to the District and the County Office of Education office no later than March 15 each year. An annual update of certain school expenditures will be provided on or before July 1 as part of the LCAP, in accordance with California Education Code sections 47605.33(a) and 47606.5.

As per California Education Code section 42100, the school will prepare, in the format prescribed by the State Superintendent of Public Instruction, an unaudited annual statement of all receipts and expenditures for the preceding fiscal year. This statement will then be filed with PES by and will be sent to the County Office of Education by September 15 and sent to the California Department of Education following certification by PES.

Financial data for the charter school will be reported to the state via the District, except in cases where the law requires charter schools to report directly to the state. For example, the year-end unaudited actual financial report will be submitted by CalCA Monterey Coast to PES and the County Office of Education by the agreed upon deadlines each year, who will in turn submit it to the state. In other situations, such as the annual independent audit, the school will submit copies directly to the District, the County Office of Education, and the California Department of Education, among other parties, as required by law.

School financial records will be accessible to PES as the authorizing agency at any time, upon request. The school responds promptly to such requests.

## Fiscal Policies

The Board has adopted strong fiscal policies, including adequate internal control policies, and will require that Connections maintain adequate internal control policies and practices. In order to ensure responsible fiscal management, CalCA Monterey Coast will continue to consult with its independent auditor over the design of these policies. As part of the Board's responsibilities, oversight over these policies and the internal controls will occur.

## Attendance Accounting

Accurate attendance accounting is crucial to the fiscal well-being of an independent study charter school. In order to minimize risks to the school's revenue, CalCA Monterey Coast will utilize accurate and sophisticated systems for documenting student attendance. CalCA Monterey Coast's attendance accounting procedures will comply with California Independent Study requirements, and with the district's requirements for certifying the charter school's ADA. In addition, CalCA Monterey Coast will transfer all attendance data to a state approved attendance accounting program (e.g., Aeries) in order to generate the data required for the state's Principal Apportionment Data Collection forms. Alternatively, the attendance accounting data may be supplied in a format and level of detail similar to the Aeries program to allow efficient certification of the charter school's ADA.

## VII.C INSURANCE

*Agree that the school will acquire and finance general liability, workers compensation, and other necessary insurance of the types and in the amounts required for an enterprise of similar purpose and circumstance, and provide evidence that the cost and availability of such insurance has been researched by the petitioners. [Ref. Criteria for Review; CCR-5, §11967.5.1(c)(3)(C)]*

Under the terms of the Statement of Agreement, the school will be named as additional insured for the 2019-20 school year and will continue with the arrangement in future years. (Connections will maintain general liability insurance and the school will be named as additional insured under such policy.) The school will have the following levels of coverage, among others.

Note that annually PES will also be issued a certificate of insurance as an additional insured, if required through the MOU (see Exhibit I for a sample of the current certificates of insurance):

- Commercial General Liability: \$1,000,000 per occurrence, \$2,000,000 aggregate;
- Automobile: \$1,000,000;
- Excess umbrella liability: \$5,000,000; and
- Worker's Compensation: Complies with current statutory limits in accordance with California Labor Code.

The Board has obtained a Director's & Officer's Liability policy that provides \$1,000,000 in coverage. The certificate of insurance is included in Exhibit I.

CalCA Monterey Coast and its vendors will maintain and keep in force such insurance or self-insurance as Worker's Compensation, Liability, and Property Damage, as protect it from claims under Worker's Compensation Acts and also such insurance or self-insurance as protect CalCA Monterey Coast from any other claims for damages for personal injury, including death, and claims for damages to any property of CalCA Monterey Coast, or of the public, which may arise from school operations, whether such operations be by CalCA Monterey Coast or by any subcontractor or anyone directly or indirectly employed by any of them.

#### **VII.D ADMINISTRATIVE SERVICES**

*Describe the structure for providing business/administrative services (including, at a minimum, personnel transactions, attendance accounting; accounting, and payroll) that reflects an understanding of school business practices and expertise needed to carry out administrative services or a reasonable plan and timeline to develop and assemble such practices and expertise. For any contract services planned to serve the school, describe the criteria and procedures for the selection of contractors. [Ref. California Education Code §47605(g) and Criteria for the Review; CCR-5, §11967.5.1(c)(3)(A)]*

The Executive Director, with the assistance of Principals, will manage the school's day to day operations as its administrative manager, including supervising certificated and non-certificated personnel. The Director of Business Services and the Board Treasurer will manage budgeting and accounting for the school. The CalOPS administrative team may utilize contracted data management technology and related services from Connections, as consistent with the Statement of Agreement.

#### **VII.E FACILITIES**

*Describe the types and potential location of any facility/ies needed to operate the size and scope of educational program proposed in the charter. If (a) specific facility/ies has/have not been identified, provide evidence of the type and projected cost of the facility/ies that may be available in the location of the proposed charter school(s). Facilities plans must reflect reasonable costs for the acquisition or leasing of facilities to house the charter school. [Ref. California Education Code §47605(g) and Criteria for Review; CCR-5, §11967.5.1(c)(3)(D)]*

As a virtual charter school, CalCA Monterey Coast will not require a physical facility for day-to-day learning. Students can work from the setting of their families' choice, such as the home or a supervised community location. The school may also arrange for the use of temporary facilities for short term face to face activities, such as state testing. As a non-classroom-based charter, the school will not be eligible to request facilities from the District under Proposition 39 regulations.

Staff members log in and work to support students in a variety of ways, using a combination of both office based as well as home based support. It is anticipated that most staff members will work from remote locations.

Administrative support may be provided from various locations in accordance with various contracts for administrative services. Funds for administrative facilities and services are incorporated into the school budget.

If CalCA Monterey Coast needs to open a new office facility at some point in the future, it would plan to locate such a facility within the geographic boundaries of PES, or within Santa Cruz County, if it can be documented that it is not possible to locate with PES boundaries.

In the future, the school reserves the right, under the terms of California Education Code section 47605.1(c), to open resource centers if there is a need for them as determined by input of staff and families, and if allowable by law. CalCA Monterey Coast will provide all required notification to the district and county of classroom facilities that the charter school establishes.

#### **VII.F TRANSPORTATION**

*Provide a description of the arrangements, if any, to be made for transportation of students, including expected level of need, proposed contracts, and adequate types and levels of insurance.*

Students at CalCA Monterey Coast will not require transportation services for regular school activities. While the school will help facilitate local extracurricular and recreational activities among CalCA Monterey Coast students and their families, the families will be responsible for providing their own transportation for these activities. The school will assist families with arranging transportation to the greatest extent possible, and will comply with all legal requirements that may apply for transportation for students with special needs in order to access special education services. The only school event that would require students to report somewhere other than their home or immediate neighborhood is state- or school-mandated examinations, which students must take at proctored locations.

If CalCA Monterey Coast provides transportation for any special event, school administrators will assure that such transportation meets all applicable safety standards and bears any motor vehicle insurance required under California state law. Any parent or guardian (or their designee) transporting students in their car to school organized events will sign appropriate waivers/release forms if required by school policy. The School Handbook (Exhibit B) will also discuss parental responsibility for transportation to school events.

## **VII.G AUDITS**

*Describe the manner in which annual, independent financial audits, as required by law, will be completed by December 15 following the close of each fiscal year, and the anticipated timeline in which audit exceptions and deficiencies (if any) will be resolved to the satisfaction of the school district. [Ref. California Education Code §47605(b)(5)(I) and Criteria for Review; CCR-5, §11967.5.1(f)(9)] Additionally, describe who will be responsible for contracting and overseeing the independent audit, including a specification that the auditor will have experience in education finance. Outline, as applicable, the process for providing audit reports to the State Board of Education, California Department of Education, or other agency as the State Board of Education may designate. [Ref. Criteria for Review §11967.5.1(f)(9)]*

### **Annual Independent Audit**

CalCA Monterey Coast will be audited annually by an independent, certified public accounting firm according to the guidelines applicable to public charter schools in California.

The Board will commission the audit and engage an auditor with experience in public school finance. The cost of the independent audit will be borne by CalCA Monterey Coast. Copies of the audit will be submitted to the District, the County Office of Education, the state controller's office, the California Department of Education, and any other agency required by law within 180 days of the end of the fiscal year and in no case later than December 15 of each year. The Governing Board may appoint a standing or ad hoc Audit Committee to engage the auditor, review the audit, and make decisions on resolving any audit findings.

### **Audit Exceptions and Deficiencies**

The CalCA schools have not historically had audit findings, exceptions or deficiencies. A copy of the annual audit, including any auditor's findings will be forwarded to the Board, or if appointed, to a standing or ad hoc Audit Committee of the Governing Board. If so appointed, the Audit Committee would review any audit exceptions or deficiencies and then report to the Governing Board with recommendations on how to resolve them. This report would include timelines and deadlines for resolving the exceptions or deficiencies. The Board then would report to PES regarding how the exceptions and deficiencies have been or will be resolved. Any disputes regarding the resolution of audit exceptions and deficiencies will be referred to the dispute resolution process contained in Section V.E. The District may elect, at its own cost and expense, to have its accountants review the audit exceptions and deficiencies.

## VII.H CLOSURE PROTOCOL

*Provide a detailed description of the procedures to be used in the case of a decision by School District or State Board of Education to revoke the school's charter, a decision by the school district not to renew the charter, or a decision by the school voluntarily to close, including plans for a final audit of the school; disposition of net assets; communication of the closure to parents and staff; and maintenance and transfer of student records. [Ref. California Education Code §47605(b)(5)(O)]*

In the event that CalCA Monterey Coast ceases operation for any reason, CalCA Monterey Coast and its Governing Board will be responsible for school closure procedures and will cooperate with PES and the California Department of Education to the extent necessary to provide an orderly return of the students to their local schools or a school of choice. CalCA Monterey Coast will follow the charter school closure procedure regulations from the California Department of Education [CCR-5 §11962].

In the event of school closure, all assets of the school, including but not limited to all leaseholds, personal property, intellectual property, and all ADA apportionments and other revenues generated by students attending the school, remain the sole property of CalOPS. If for any reason CalOPS was dissolved, the disposal of any net assets remaining after the liabilities of all of its charter schools have been paid or otherwise addressed shall occur in accordance with applicable law and the corporation's Articles of Incorporation and Bylaws.

- Any grant funds and restricted categorical funds would be returned to their source if required by the terms of the grant or state and federal law, as appropriate, which may include submission of final expenditure reports for entitlement grants and the filing of any required Final Expenditure Reports and Final Performance Reports, and
- Any donated materials and property would be returned in accordance with conditions, if any, established when the donation of such materials or property was accepted.

The decision on distribution of the school's assets will be made by the Governing Board. If CalCA Monterey Coast does not have sufficient assets to pay all of its bills at the time it ceases operation, neither PES, the Santa Cruz County Department of Education, nor will the CDE be responsible for its unpaid bills.

### Other Closure Procedures

- The decision to close the charter school will be documented by an official action of the school's Governing Board and the District's Governing Board. The action will identify the reason for closure. A notice of school closure will be sent to PES, the California Department of Education Charter School Unit, the County Office of Education, the school's SELPA, and the State Teachers' Retirement System, the accrediting body WASC, the University of California a-g office, the NCAA, as well as all other agencies as required. This notice will contain all relevant and required information, including the effective date of closure.
- Parents/guardians and students will be notified in writing and will be provided with or have access to student information or records necessary to facilitate transfer to another school.

- Other school districts that may need to provide services to the charter school students may be notified in writing.
- The school's Governing Board or its designee shall create a list of students in each grade level and the classes they have completed, together with information on the students' district of residence, and will provide that to the person/entity responsible for closure activities.
- A process for transfer of student records, state assessment results and any special education records will be established and followed. In addition, a plan for the maintenance of school and student records for a reasonable period of time following the closure will be made. All student records will be turned over to the students' district of residence, when known, unless otherwise agreed in the adopted plan. Personnel records will be transferred or maintained as required by law.

An independent audit of the school will be completed as quickly as feasible, but not later than six months following closure of the school to determine the net assets and liabilities of the charter school and will include at least the following:

- An accounting of all financial assets, including cash and accounts receivable and an inventory of property, equipment, and other items of material value.
- An accounting of the liabilities, including accounts payable and any reduction in apportionments as a result of audit findings or other investigations, loans, and unpaid staff compensation.
- An assessment of the disposition of any restricted.
- Any required final financial or other reports will be submitted to the CDE and other applicable agencies.
- Copies of all financial and attendance records will be provided to the sponsoring district according to state and federal requirements, unless otherwise agreed upon by both the Board and PES's Governing Board.

If financial liabilities are incurred during the closure procedures, CalCA Monterey Coast will be fully responsible for payment of these, according to the Board adopted financial plan. This closure protocol shall survive the revocation, expiration, termination, cancellation of this charter or any other act or event that would end CalCA Monterey Coast's right to operate as a charter school pursuant to this charter or cause CalCA Monterey Coast to cease operation.



## **VII.I SCHOOL SERVICES CONTRACT**

*If the proposed charter school intends to enter into a contract with an education management organization (EMO), include the following:*

*A description of the proposed contract including roles and responsibilities, performance evaluation measures, payment structure, conditions for renewal and termination, and investment disclosure;*

*A draft of the proposed management contract;*

*A description of the firm's roles and responsibilities for the financial management of the proposed charter school and the internal controls that will be in place to guide this relationship;*

*A list of other schools managed by the school management company, including contact information; and*

*A summary of the company's history and philosophy, past results of its school management efforts, and background on its corporate leaders.*

### **Roles and Responsibilities**

The Statement of Agreement with Connections will cover provision of various products and services and a sample is provided in Exhibit F. Some examples include:

- Licensing of Connections' curriculum for use by CalCA Monterey Coast;
- Access to resources and assistance designed to enhance teacher effectiveness in creating Personalized Learning Plans for each student, as required to meet or exceed any educational standards established by the State of California or otherwise required by the authorizer;
- Access to student assessment tools in order to facilitate and support administration of ongoing evaluation efforts;
- Certain instructional services and personnel as permitted by California law;
- Access to assignment management and tracking tools, including Connexus;
- Communication via multiple technologies, including phone, webmail, and chat;
- Access to technology tools for students, teachers, and other school staff;
- Training materials for Learning Coaches and teachers;
- Student record management;
- Special needs accommodations of the curriculum;
- Other administrative services; and
- Trademark license rights to use of the Connections registered trademark as part of the school name, as well as rights to use of other trademarks in communicating the school's mission to parents, students, and the general public.



The Statement of Agreement will outline the respective roles and will be developed in accordance with California law regarding such relationships.

### **Financial Reporting and Controls**

The school's budget is developed and managed by CalCA Monterey Coast staff and approved by the school's Governing Board. Connections provides some administrative and fiscal support services. CalCA Monterey Coast staff, plus the Board Treasurer and Board will be responsible for reviewing, evaluating and/or approving these items, and for providing them (through their designees) to the appropriate state and local agencies (see also Section VII.B.).

### **Term, Termination, and Renewal**

In order to promote the charter school's mission of delivering an education program that is of high quality and is accountable, detailed language regarding termination and renewal of the Connections and CalCA Monterey Coast relationship will be included in the Statement of Agreement. In order to provide a stable educational program for CalCA Monterey Coast families, the term of the agreement covers the five years of the charter approval. The agreement will be renewable.

While termination is not desirable, the Statement of Agreement will provide for several different reasons that termination could occur. For example, the Board may terminate its agreement with Connections if it determines Connections has not performed as expected or if it determines that Connections has failed to provide educational services that meet California independent study requirements. Connections may terminate the agreement if CalCA Monterey Coast does not meet its financial obligations to Connections. Either party may terminate if there is breach of contract. The breaching party would be given an opportunity to respond and cure, and written notification is required at all times. In addition, both parties can terminate if they agree in writing to do so. In order to minimize disruption of students and staff, any termination would be planned to occur at the end of an academic year if possible.

### **Payments**

Payments will be made by the charter school to Connections under the terms of the Statement of Agreement. Payments will be made to Connections on a periodic basis, and while invoices are typically due within 30 days of approval by the Governing Board, the actual payment timeline may be extended to account for the timing of receipt of revenue by the charter school from state, local, and private agencies.

## VI. CHARTER SCHOOL ACCOUNTABILITY, RENEWAL AND REVOCATIONS

*Include a statement reflecting the conditions under which the charter may be revoked and/or may not be renewed. [Ref. California Education Code §47607]*

### VIII.A ACCOUNTABILITY REPORTS

In order to ensure adequate progress towards renewal of the charter, CalCA Monterey Coast will compile and provide a Local Control and Accountability Plan to PES as well as to any other required agencies as required by law (currently found in California Education Code section 47606.5). The format and evaluation of the plan will adhere to state laws (currently laid out in California Education Code sections 52064 and 52064.5). Additional information regarding the LCAP is found in Section III.A. The LCAP will include any state required elements, including a summary of progress towards the goals developed for the LCAP or other alternative accountability reports may include other optional data, such as:

- Summary data showing student progress toward the goals and outcomes specified in Section III.A from the assessment instruments and techniques in Section III.C.
- An analysis of whether student performance is meeting the goals specified in Section III.A. This data may be displayed on both a school-wide basis and by subgroups, which are disaggregated by numerically significant racial and ethnic and other categories.

Additional accountability measures related to the charter school's performance are listed herein and may be included in the SARC, the California School Dashboard, and/or other accountability reports:

- Data on the level of parent involvement in the school's governance (and other aspects of the school, where applicable) and summary data from an annual parent and student satisfaction survey;
- Data regarding the number of staff working at the school and their qualifications;
- Information on the racial, ethnic, and socioeconomic composition of the school, and a demonstration of whether the school implemented the means listed in charter Section VI.B to achieve a racially and ethnically balanced student population;
- Information regarding the school's outreach and admissions practices during the year and data regarding the numbers of students enrolled;
- Data on the number and resolution of disputes and complaints under the school's Uniform Complaint Procedures;

- Other information regarding the educational program and the administrative, legal, and governance operations of the school relative to compliance with the terms of the charter generally; and
- The annual audit and other relevant financial information.

In addition to meeting any requirements of the state, in particular for the LCAP, CalCA Monterey Coast will work with PES to jointly develop content, evaluation criteria, timelines, and process for any additional accountability reports.

When needed, these arrangements will be laid out in the MOU with PES, which will be reviewed annually.

The school and District may also jointly develop an annual site visitation process and protocol to enable the District to conduct its oversight responsibilities, gather information needed to confirm the school's performance and compliance with the terms of this charter. If the school does not have a local administrative office facility, the school and District may meet at the District office as part of the annual oversight process.

#### **VIII.B TERM OF THE CHARTER**

The term of the charter will be five years, commencing on the first day of the fiscal year in which the school opens and expiring five school years later, unless renewed. This charter is not intended to expire prior to the end of the fifth school year following school opening.

#### **VIII.C OVERSIGHT AND RESPONSE TO INQUIRIES**

PES may inspect or observe any part of the school at any time, but will provide reasonable notice to the Executive Director or Site Administrator, to the extent practicable prior to any observation or inspection. PES will provide such notice at least three working days prior to the inspection or observation unless the school's Governing Board or Executive Director agrees otherwise. Inspection, observation, monitoring, and oversight activities may not be assigned or subcontracted to a third party by PES without the consent of the Governing Board, which shall not be unreasonably withheld.

The school agrees to promptly respond to all reasonable inquiries, including requests for financial records, from the District, County Office of Education, or the California Department of Education. Records or data supplied would be subject to FERPA and employee privacy laws.

#### **VIII.D REVOCATION**

Prior to commencement of revocation proceedings, PES and CalCA Monterey Coast will first endeavor to resolve any dispute under the dispute resolution process set forth in Section V.E. If, following the completion of that process, the Governing Board of the District believes it has cause to revoke this charter, the District agrees to notify the Governing Board of the school in writing, noting the specific reasons for which the charter is in danger of being revoked, and grant the school reasonable time to respond to the notice and take appropriate corrective action.

In accordance with California Education Code section 47607(c)(1) and 47607.3, the following items may be considered violations that could lead to revocation or non-renewal of the charter:

- Failure to meet or pursue the pupil outcomes identified in the charter;
- A material violation of any of the conditions, standards or procedures set forth in the charter;
- Failure to meet generally accepted accounting principles;
- Fiscal mismanagement; and
- Violation of the law.

CalCA Monterey Coast and PES will agree to follow the interventions explained in California Education Code section 47607.3 regarding failure to meet pupil outcomes. If the charter school disputes the cause(s) for revocation, the dispute procedures listed in Section V.E will apply. Notwithstanding any other provision of this charter, the District shall comply with applicable laws and regulations regarding revocation proceedings.

All attempts will be made to avoid school closure due to revocation in the middle of a school year.

In the event that the school is closed, the closure protocols and processes as described in Section VII.H will be followed.

#### **VIII.E RENEWAL AND AMENDMENT PROCESS**

The Governing Board of CalCA Monterey Coast may request from the PES Governing Board a renewal or material revision of the charter at any time prior to expiration. However, renewal requests ideally should be presented by the school to the district no later than 120 days prior to the expiration of the charter. The PES Governing Board agrees to hear and render a renewal decision pursuant to the initial charter petition review timelines and processes as specified in the California Education Code section 47605(b) and CCR Title 5, Section 11966.4.

Renewals will be for a period of five years, as is currently specified in California Education Code section 47607(a)(1).

The charter may be materially revised at any time using a process similar to the renewal process. Any material revision of the charter requires an amendment that must be approved by the Governing Board of the charter granting authority. Non-material amendments to the charter may occur by approval of the charter school Governing Board and notification to PES. CalCA Monterey Coast and PES must agree on whether an amendment is material or non-material. The charter school agrees to contact the District Superintendent when any amendment, either material or non-material, is proposed. The charter school and PES do not anticipate that language regarding student performance, student outcomes, school finances or any other elements of the LCAP or its annual updates will constitute or create material revisions to the charter.

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## **IX. IMPACT ON THE CHARTER AUTHORIZER**

*Provide information regarding the potential effects of the charter school on the school district, including, but not limited to, the facilities to be utilized by the school, the manner in which administrative services of the school are to be provided, and potential civil liability effects. [Ref. California Education Code §47605(g)]*

### **IX.A PES'S VISION**

PES's vision is to "prepare children for life through experiential learning that addresses the needs of the whole child."<sup>31</sup>

CalCA Monterey Coast will support and enhance this vision by providing each student with a Personalized Learning Plan which challenges individual students to excel and succeed through a differentiated educational path. When students work at a challenging but realistic level that fits their educational needs and goals, they develop academic confidence, feel positive about their school experience, and in turn realize their potential and are empowered in their success. This allows students to become contributing citizens in a diverse and global society. CalCA Monterey Coast also promotes strong parent partnerships and offers a safe learning environment for all students.

### **IX.B BENEFITS**

There are many benefits that PES will receive through sponsoring CalCA Monterey Coast. One of the most significant benefits is being able to serve students that were underserved or not being served within the community. Providing access for students to fully qualified teachers and to innovative, interactive 21<sup>st</sup> century curriculum from a partner who has demonstrated success meets the goals and mission of PES. It also provides an opportunity for PES to reengage students in a charter sponsored by PES who may have chosen other virtual or charter opportunities.

The District will provide supervisory oversight as required by law, in exchange for an oversight fee of up to 1% of the portion of the charter school's annual public revenue, as defined in California Education Code section 47613 (f). The definition of which staff functions constitute District oversight will be included in the MOU (see Exhibit G).

CalCA Monterey Coast will represent an outstanding virtual educational choice for families in Santa Cruz County and contiguous counties and this will build awareness of PES's innovative approach to learning. Increased awareness of PES will be of benefit to PES's own community outreach efforts.

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<sup>31</sup> <https://www.pacificesd.org/mission-and-vision.html>

### **IX.C FACILITIES**

CalCA Monterey Coast will have no negative impact on the district with respect to facilities. As a non-classroom-based program, CalCA Monterey Coast will not be eligible for facilities under Proposition 39. The school will agree to comply with all applicable laws related to jurisdictional limitations to the locations of its facilities and any legally required notices regarding school sites.

### **IX.D ADMINISTRATIVE SERVICES**

The CalCA Monterey Coast staff will cooperate fully with District staff in the preparation and reporting of all required data and financial information. The District and the charter school may enter negotiations during the MOU process to provide services to the charter school. Neither party is obligated to provide or accept such services, but may do so by mutual agreement. The Superintendent or designee of the District will be authorized to negotiate and enter into an agreement to provide services to the charter school.

### **IX.E CIVIL LIABILITY EFFECTS**

Since the school will be operated by a non-profit public benefit corporation, CalCA Monterey Coast will be legally independent from PES. In addition, CalOPS will maintain adequate insurance coverage to further limit liability of the district. Internal dispute processes will be in place to decrease the incidence of legal disputes. CalCA Monterey Coast and CalOPS will retain services of attorneys familiar with charter school legal issues to prevent legal problems from arising.

## **X. ASSURANCES**

This Charter shall, in all respects, be governed by the laws of the State of California applicable to agreements executed and to be wholly performed within the State of California. Nothing contained herein shall be construed so as to require the commission of any act contrary to law.

This assurances page is intended to be signed by a duly authorized representative of the applicant and submitted with the full charter application.

As the authorized representative of the applicant, I hereby certify that the information submitted in this application for a charter renewal for California Connections Academy Monterey Coast, is true to the best of my knowledge and belief; and further I understand that if awarded a renewal of the charter, the School:

1. Will meet all statewide standards and conduct the student assessments required, pursuant to Education Code Section 60605, and any other statewide standards authorized in statute, or student assessments applicable to students in non-charter public schools. [Ref. California Education Code Section 47605(c) (1)].
2. The California non-profit public benefit corporation which operates California Connections Academy Monterey Coast will be the exclusive public school employer of the employees of the charter school for the purposes of the Educational Employment Relations Act [chapter 10.7 (commencing with Section 3540) of Division 4 of Title 1 of the Government Code.] [Ref. California Education Code Section 47605(b)(6)]
3. Will be nonsectarian in its programs, admissions policies, employment practices, and all other operations. [Ref. California Education Code Section 47605(d)(1)]
4. Will not charge tuition or other prohibited fees. [Ref. California Education Code Sections 47605(d) (1) and 49010 et seq.].
5. Will admit all eligible students who wish to attend the school, and who submit a timely application, unless the school receives a greater number of applications than there are spaces for students, in which case each applicant will be given equal chance of admission through a random lottery process. [Ref. California Education Code Section 47605(d)(2)]
6. Will comply with all laws establishing the minimum and maximum age for public school enrollment and funding. [Ref. California Education Code Section 47612(b), 47610(c)]
7. Will not discriminate against any student on the basis of ethnic background, national origin, immigration status, gender, gender identity, gender expression, disability, or any other basis protected by law. [Ref. California Education Code Section 47605(d)(1)].
8. Will adhere to all provisions of federal law relating to students with disabilities, including the IDEA, Section 504 of the Rehabilitation Act of 1974, and Title II of the Americans with Disabilities Act of 1990, that are applicable to it.



9. Will notify the superintendent of the school district of the pupil's last known address within 30 days if a pupil is expelled or leaves the school without graduating or completing the school year for any reason, and the school shall, upon written request, provide that school district with a copy of the cumulative record of the pupil, including a transcript of grades or report card and health information. [Ref. California Education Code § 47605(d)(3)].
10. Will, on a regular basis, consult with its parents and teachers regarding the school's education programs. [Ref. California Education Code § 47605(c)(2)]
11. Will meet all requirements for employment set forth in applicable provisions of law, including, but not limited to credentials, as necessary [Ref. Criteria for Review, section 11967.5.1(f)(5)(C)] and including the criminal record background check and summary required by Ed Code 44237.
12. Will ensure that teachers in the school hold a California Commission on Teacher Credentialing certificate, permit, or other document equivalent to that which a teacher in other public schools are required to hold. As allowed by statute, flexibility will be given to non-core, non-college preparatory teachers (as defined in this charter). [Ref. California Education Code Section 47605(l)] The school will also insure that copies of these credentials will be kept on file at the school and available for inspection upon request.
13. Will at all times maintain all necessary and appropriate insurance coverages.
14. Will comply with any applicable jurisdictional limitations and requirements set forth in the Education Code. [Ref. California Education Code §§ 47605 & 47605.1]
15. Will submit an annual accountability plan to the authorizer as laid out in California Education Code § 47606.5.
16. Will follow any and all other federal, state, and local laws and regulations that pertain to the operation of the charter school.
17. Will comply with all regulations regarding independent study programs that are applicable to charter schools.
18. Will comply with all state audit and other state reporting requirements for charter schools.
19. Will comply with all applicable portions of the Elementary and Secondary Education Act and the Every Student Succeeds Act.
20. Will comply with the Public Records Act.
21. Will comply with the Family Educational Rights and Privacy Act.
22. Will ensure that meetings of the Governing Board for the school shall comply with the applicable sections of the Ralph M. Brown Act.
23. Will maintain accurate and contemporaneous written records that document all pupil attendance and make these records available for audit and inspection. [Ref. California Education Code Section 47612.5(a)]

24. Will respond to all inquiries regarding records, both financial and other, and will provide access to the district to such records.

DRAFT

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Signature

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Date

Dr. Richard Savage

Printed Name

Executive Director

Title

DRAFT



# Watsonville/Aptos/Santa Cruz Adult Education

A Division of the Pajaro Valley Unified School District

## Administration (831) 786-2160

Dr. Nancy A. Billich  
Director

Todd Livingstone  
Assistant Director

## Departments

Basic and Secondary  
Adult Education

English as a Second  
Language

Career and Technical  
Education

Adults Training to  
Support Child School  
Success

Adults with Disabilities

## District

## Administration (831) 786-2100

Dr. Michelle Rodriguez  
Superintendent

Joe Dominguez  
Chief Business Officer

## Assistant

## Superintendents

## TBH

Secondary Education

Dr. Chona Killeen  
Human Resources

Lisa Aguerria Lewis  
Elementary Education

Susan Perez  
Educational and EL  
Services



California Adult Schools  
LEARNING FOR LIFE

## Memorandum Of Understanding

This is an agreement between the management of Pacific Elementary, Community Action Board of Santa Cruz (CAB) and Watsonville/Aptos/Santa Cruz Adult Education (WASCAE) for the period of January 2019 through June 2020

### WASCAE Adult Education agrees:

1. In cooperation with the management of the facility, WASCAE will employ those teachers necessary for the instructional program. Teacher selection, placement and evaluation are the primary responsibilities of the WASCAE Adult Education director.
2. WASCAE will abide by the policy and procedures of the facility regarding health and safety.
3. The instructor or the WASCAE Adult Education will notify the facility when a substitute teacher will be present. If no substitute can be found, the facility will be notified as early as possible.
4. Courses may be terminated by either party, following a written notice given a minimum of two (2) weeks' notice, may be waived in emergencies with the approval of both parties.
5. The teacher is to begin the class promptly and end at the scheduled time.
6. Consumable supplies and materials used by the teachers will be furnished by WASCAE.
7. To carry and maintain during the entire term of this agreement, comprehensive general liability insurance, and professional liability insurance in an amount not less than one million dollars (\$1,000,000) per occurrence. Such insurance carrier shall be written by an insurance carrier satisfactory to the District and shall include the Pajaro Valley Unified School District as "Additional Insured."

### The Facility agrees:

1. Appropriate class facilities and materials storage space for each class.
2. All WASCAE adult Education employees working at the facility will be instructed by the facility on procedures to follow in case of fire, earthquake and other emergencies.
3. Classroom furniture needed by the students shall be furnished by the facility upon agreement between facility director and the teacher.
4. Community Action Board will be responsible in obtaining the minimal amount of students to operate classes.

Dr. Nancy A. Billich, Director

NOVEMBER 1, 2018  
Date

Dr. Michelle Rodriguez, Superintendent  
  
Erik Gross, Superintendent/Principal  
Pacific Elementary

\_\_\_\_\_  
Date  
11/2/18  
Date

MariaElena De La Garza, Executive Director  
Community Action Board of Santa Cruz

\_\_\_\_\_  
Date



Green Valley Center: 294 Green Valley Road, Watsonville, CA 95076 Telephone: (831) 786-2160 Fax: (831) 722-2749  
ILC, Institute of Language and Culture: 320 Rodriguez Street, Watsonville, CA 95076 Telephone: (831) 786-8225 Fax: (831) 786-9420  
Santa Cruz Center: 319 La Fonda Avenue, Santa Cruz, CA 95062 Telephone: (831) 429-3966 Fax: (831) 429-3061  
Website: [www.wascae.pvusd.net](http://www.wascae.pvusd.net)

**Financial and Operational  
MEMORANDUM OF UNDERSTANDING  
Between**

**(Name)       School District and California Online Public Schools for  
California Connections Academy       (Region)        
Effective       (Month/Day)      , 2018**

**1. RECITALS**

The governing Board of       (Name)       School District (hereinafter referred to as "District") granted a charter to California Online Public Schools, a non-profit corporation (hereinafter referred to as "Corporation") for California Connections Academy       (Region)      , a charter school, (hereinafter referred to as "School") on       (Date)      , pursuant to the *Charter Schools Act* of 1992, as amended (the "Charter"). This Charter, among other matters, calls for the Corporation, acting on behalf of the school, and the District to enter into a mutually agreeable Memorandum of Understanding ("MOU" or "Agreement") that describes funding entitlements of the School, operation and oversight arrangements, and other matters of mutual interest. To the extent this MOU contains terms that are inconsistent with the terms of the approved charter, the terms of the Charter shall control.

**2. PURPOSE OF THIS MEMORANDUM**

- Define funding entitlements of the School and the terms under which the District will make funds available to the School
- Define fees to be paid from the School to the District
- Define services that the District will provide to the School
- Clarify the responsibilities of each party.

**3. TERM**

The term of this MOU shall be from       (Date)       and will continue in full force and effect until such time the School is no longer chartered by the District, unless the MOU is terminated pursuant to Section 21.3. Both parties agree to review this MOU annually and update this MOU as necessary.

**4. STATUS OF CHARTER SCHOOL**

The following characteristics describe the School and its relationship to the District for purposes of this MOU:

Legal status	<u>      </u> Dependent on District	<u>  X  </u> Non-profit Corporation
Employer for Collective Bargaining	<u>      </u> District	<u>  X  </u> School
Special Education	<u>      </u> Provided By District	<u>  X  </u> Provided By School
Legal Status of Special Ed	<u>      </u> Public School of District	<u>  X  </u> LEA in SELPA

(subject to acceptance by       (Name)       County/District SELPA)

## 5. FUNDING SOURCES

- 5.1 Direct Funding. The School shall receive direct state funding in accordance with Ed. Code Section 47633. The School will be responsible for providing the State Department of Education and/or the District with all data required for direct funding. The School shall receive funding from new or “one-time” funding sources available to schools or school districts provided by the State of California to the extent that the Charter School and its Students generate such entitlements. The District will cooperate with the School, as necessary, to procure such additional funds.
- 5.2 Property Taxes. The District shall distribute the funds known as “in lieu of property taxes” to the School as described in Ed. Code Section 47635, and as outlined in this agreement (See Section 6.1). In the case where distribution of property tax to the school in accordance with the schedule laid out in Ed. Code Section 47635(b) creates a financial hardship for the District, or as otherwise agreed to by both parties, the School and District will work out an alternative payment plan.
- 5.3 State and Federal Funds. The District and/or County Treasurer shall distribute funds to the School from state and federal sources in a manner and timeline similar to other public schools.
- 5.4 Special Education Funds. The \_\_\_\_\_ (Name) \_\_\_\_\_ County/District Special Education Local Plan Area (SELPA) and the School will maintain a separate arrangement for Special Education funding. However, if the District receives any of the Special Education funding for School students, the District shall immediately transfer such funds. The parties recognize the funds received for special education purposes from federal and state resources are currently inadequate, and that additional funds are required. It is the intent of the parties that, outside of the above-mentioned funding received from the SELPA and/or the District, the School will bear financial responsibility for the provision of special education services. The School, as a Local Educational Agency (LEA) in the SELPA, will be required to pay for all excess costs related to the provision of special education services to its Students. The School may participate in any risk pooling arrangements of the SELPA in the same manner as any other LEA of the SELPA. The School retains the right to join another SELPA and in which case, the parties will amend the MOU to reflect the name of the new SELPA.
- 5.5 Non-governmental Funds. The School retains the right to apply for and receive private grant money and/or private donations on its own, and to engage in other fund-raising and service providing activities. The School shall retain all such funds for its use consistent with the terms of such grants or activities. Any such monies received shall not reduce the annual apportionment received from the District.

## 6. CASH FLOW AND TRANSFER

- 6.1 Payments From District to School. The District agrees to pay the School “in lieu of property taxes” according to the schedule laid out in Ed Code Section 47635. The schedule will be developed and included in **Table 1** (*NOTE for SAMPLE: Table 1 to be developed based on mutually agreeable schedule of payments*) based initially on the most recent funding rates from the state and on the ADA projected in the school’s adopted budget. The amount due to the School may then be re-calculated based on the P1 certified property tax rates, and then modified again after the P2 certification occurs. At the end of the fiscal year, the final amounts of payments will be made, which will also include any calculations for prior year adjustments to property tax, as certified by the state. The District will make payments based on the current and updated Table 1 amounts within 30 days of the beginning of each month. Details of the amounts due from the District to the School will be calculated in **Table 1**, which may be updated as often as three times per year: prior to the commencement of school, after P1 certification and after P2 certification. This payment plan may be adjusted by mutual agreement pursuant to the adjustment and reconciliation process described in Section 7 below. Both parties agree to re-negotiate this section, as mentioned in Section 5.2 above, if the state schedule of payments creates a financial hardship for the District, or if otherwise desirable to both parties.
- 6.2 Payments From School to District. The School shall pay funds due to the District as described in the schedule developed as part of this MOU and as laid out in Table 2. **Table 2** (*NOTE for SAMPLE: Table 2 to be developed based on mutually agreeable schedule of payments*) contains details of ongoing funds due and is to be updated at least twice annually: prior to the commencement of the school year, based on the adopted budget, and then again after the P2 reporting period has ended, as soon as possible after certification of P2 by the state. The School may pay the amounts due to the District using the amounts in Table 2, or the District may elect to invoice the School separately for funds due to the District. If the District elects to invoice the School, the School shall pay the District as soon as possible and no later than sixty (60) days after the receipt of an invoice.
- Oversight fees are described in Section 8.3 of this Agreement. The schedule of payments may be adjusted by mutual agreement pursuant to the adjustment and reconciliation process described in Section 7 below.
  - Administrative service fees are described in Section 12 and will be adjusted annually.
- 6.3 Other Services. The estimates of costs for other services provided by the District to the School are based on mutual agreement and are discussed in Section 12 of this MOU. Other services shall be agreed upon and recorded in separate agreements. Payments may be incorporated herein with mutual written consent of parties.

## **7. ADJUSTMENTS AND RECONCILIATION**

The amounts described in Tables 1 and 2 are estimates of amounts due to be transferred between the District and the School based on the current best information available. These amounts are estimated based on the projected enrollment of the School, the budget adopted by the School's Board of Directors ("Board"), estimates of state and local funding rates, and the guidelines of the California Department of Education ("CDE") School Fiscal Services Division.

Either party may request, at any time, a meeting to discuss adjustments to, or reconciliation of, these figures whenever there is reason to believe that these estimates are not reflective of the actual amounts owing. Payments to the School will be adjusted following P2 adjustments to revenues made by the state, and reconciled annually during the fiscal close out of the prior fiscal year. Payments to the School shall also be subject to adjustment based on any adjustments to student counts as a result of an audit by the state of California.

Financial adjustments may be made in subsequent fiscal years between the School and the District that result from apportionment changes, audit adjustments, and/or other legally required adjustments.

Any funds due the School under the Charter School Law between the beginning of a contracted fiscal year and the commencement of the terms of this agreement will be paid as soon as possible following written invoice by the School for these funds, and no later than thirty (30) days following receipt by the District of the invoice.

## **8. SUPERVISORIAL OVERSIGHT**

The School, the Corporation, and the District agree that the "supervisory oversight" as used in Ed. Code sec. 47613 shall include the following:

1. All activities related to the charter revocation, renewal and amendment processes, as described in Ed. Code sec. 47607 and of the School Charter.
2. Activities related to monitoring the performance and compliance of the Charter School with respect to the terms of its Charter, related agreements and applicable laws.
3. Review of and timely response, if applicable, to any school performance reports, including LCAP (Charter, Section VIII.A.) and related processes as outlined in the School's Charter.
4. Participating in the dispute resolution process as described in Section V. E. of the Charter.
5. Development and updating of this MOU to clarify and interpret the charter and the operational relationship of the District and the School.
6. Completion of the following duties required under Education Code Section 47604.32:
  - a. Identify at least one (1) District staff member as a contact person for the School.
  - b. Visit the School at least annually. If the school does not have a local administrative office facility, the school and District may meet at the District office as part of the annual oversight process.
  - c. Ensure that the School complies with all reports required of charter schools by law.



- d. Monitor the fiscal condition of the School, including review of annual fiscal audit of the School.
  - e. Provide timely notification to the CDE if any of the following circumstances occur:  
Renewal of the charter is granted or denied; the charter is revoked; or, the School ceases operation for any reason.
7. Inspection of teacher credentials, as per EC 47605 (l). The District will attempt to provide one business days' notice of any inspection of credentials it wishes to conduct.
8. Communication between the School and District staff that relates to these oversight and monitoring activities will not be considered "other services" as defined in Section 12 of this MOU.
- 8.1 Local Control Accountability Plan. In addition to an annual audit and in accordance with Education Code Section 47606.5, the School shall deliver to the District by July 1 of each year, a report which provides an analysis of academic performance of Students during the prior school year as required by the state and as further described in the Charter Section VIII. A. The report shall include performance required in the state's accountability system, applicable requirements under the Every Student Succeeds Act, or equivalent federal requirements, and any other required elements.
- 8.2 Monitoring Activities by District. The District shall provide at least 24-hour advance notice prior to an official visit for the purpose of monitoring the School and shall make an effort not to disrupt instruction during any visit. After the 24-hour notice, the superintendent reserves the right to visit the school. This provision however, shall not impede the District's ability to visit the school without advance notice should the District have reason to believe that a severe and imminent threat to the health or safety of pupils exists at the school.
- 8.3 Oversight Fees. In accordance with Education Code Section 47613 (a) and (f), the District will charge the School for the actual costs of this oversight. **Table 2** indicates the current estimate of this amount. (See also Section 6.2.) The School and District agree that the Oversight Fee shall not exceed one (1%) percent of the School's Local Control Funding Formula general purpose revenues. The annual amount owed for the Oversight Fees will be adjusted at least once annually following the state's certification at P2 of the amount of revenue owed to the school as defined above. Subsequent adjustments may also be made during the following fiscal year if necessitated by adjustments to the school's revenue by the state.

## 9. DATA REPORTING

- 9.1 Average Daily Attendance (ADA). The School will develop an attendance reporting calendar and maintain a system to record and account for ADA. The School will report the ADA figures to the District, the County Office of Education, and/or the California Department of Education, as required by law, on a timely basis for the P1, P2 and annual reporting periods. When requested, the School shall report ADA to the District on a more frequent basis. The School and District will review and agree on the procedures to be used for attendance accounting when updating this MOU, including review of the school's attendance calendar.
- 9.2 California Pupil Longitudinal Achievement Data System (CALPADS). The School shall complete and submit enrollment and other necessary demographic information to CALPADS and obtain State Student Identification Numbers from CALPADS, as necessary, on its own behalf. The School and District may negotiate for the District to provide support for CALPADS reporting on a fee for service basis, but only if such a service is mutually agreeable to both parties.
- 9.3 Other Data. The District and the School shall work cooperatively to supply any other information necessary to enable the School and District to calculate entitlement to all available funding sources and to comply with any other state reporting requirements.
- 9.4 Information Systems Package. The School has elected to purchase its own software for Information Systems and will maintain the software so that ADA and other data reporting may be done in a timely and accurate manner in accordance with state guidelines.

## 10. BUDGET AND FINANCE

On behalf of the School, the Corporation shall annually provide the following financial information to the District:

- a) A proposed budget, approved by the Corporation's Board for the School, for the upcoming fiscal year. The budget will show estimated revenue and expenditures based on identified and reasonable assumptions. The approved budget will be available on or before July 1 of the fiscal year.
- b) Following final budget revisions at the State level, if the Corporation has revised the School's budget, the Corporation will provide the School's revised operational budget effective as of October 31. The revised Budget would be provided as part of the first interim financial report due on December 15 each year. The Corporation will notify the District prior to that date if the School becomes aware of any substantial budget changes.
- c) Monthly financial reports will be available to the District in the format used to present the reports to Corporation's Board.

- d) In accordance with Education Code Section 447604.33, mid-year financial reports displaying the financial status of the School as of October 31<sup>st</sup>, and January 31<sup>st</sup>, will be provided to the District and County Office of Education no later than December 15<sup>th</sup> and March 15<sup>th</sup>, respectively. Financial information will be provided in a format mutually agreed upon by the Corporation and District. The County Office of Education may also make requests regarding the format of the interim reports.
- e) The Corporation will provide the District and the County Office of Education with unaudited actual reports for the School for the full prior year no later than September 15, as required by Education Code Section 47604.33. The charter school alternative format provided annually by the CDE will be the format used unless otherwise mutually agreed upon by the School and District.
- f) The District reserves the right to request additional School financial information and inspect School financial records if District officials deem such information necessary to perform State required financial oversight responsibilities. Such requests would be made in writing and reasonable timeframes would be established to allow the Corporation to produce such additional financial information.

## 11. FISCAL AUDIT

The Corporation shall cause to be prepared an annual audit of the financial transactions of the School each year pursuant to the terms specified in the charter. The Corporation shall retain an auditor certified to audit public schools. This audit will include School attendance records (as described in the Charter). The Corporation shall forward a copy of the audit to the Superintendent of the District, as well as to other parties required by law, after review by the Corporation's Board of the final audit findings. An annual audit will be completed by December 15<sup>th</sup> following the close of the school year. Any negative findings or exceptions shall be resolved pursuant to the terms of the Charter and the relevant provisions of the Education Code.

## 12. OTHER SERVICES

- 12.1 Fees for Other Services.  
The District may provide other technical support to the School upon request at a mutually agreed upon rate.
- 12.2 Scheduling of Services. The School will submit requests for District services via mutually agreeable procedures. The School agrees to work cooperatively with District staff to coordinate the scheduling and scope of the services to be provided.
- 12.3 Optional Services. The School may opt for the following services from the District or from another provider.
  - a) Information/computer systems and support for attendance accounting and student information data management, technical and software support provided by District personnel, billed on a mutually agreeable basis.

- b) Fiscal consultation and planning (for services beyond the scope of Supervisorial oversight).
- c) Risk management.
- d) Staff development and training: Provided on a rate to be agreed upon prior to the training session. Training services may be obtained by attendance at district classes, or be organized specifically for School staff.
- e) Food Services.
- f) Counseling or academic advising services.
- g) Special education services.
- h) Temporary testing locations to administer proctored tests to students of the School.

12.4 Termination of Services. If either the District or the School (or the Corporation on behalf of the School) decide to terminate provision of ongoing services being provided under Section 12.3, that party must give the other at least sixty (60) days' notice of its determination to terminate services being provided.

### **13. SPECIAL EDUCATION AND RELATED SERVICES**

The School has elected to be a Local Educational Agency for special education purposes pursuant to Education Code 47641. For purposes of this agreement, the SELPA shall provide the state and federal Special Education funding to the School and the School shall provide all services to the School's Students and shall be financially responsible for the provision of those services as further described below. This MOU constitutes written verifiable assurances that the School will provide special education services in compliance with all applicable laws and regulations. The information below provides additional information about how the School will provide Special Education Services to enrolled students in compliance with applicable laws.

- 13.1 Section 504 and the ADA. Absent agreement of the parties to the contrary, the School shall be solely responsible, at its own expense, for compliance with Section 504 and the Americans with Disabilities Act (ADA) with respect to eligible Students.
- 13.2 Interpretation of Agreement. Nothing in this MOU is intended to supersede any term or condition of the charter granted to the School.
- 13.3 Identification and Referral of Students. The School has the initial responsibility to make referrals for identification and assessments of any Students who are enrolled in the School who are believed to be eligible for special education assessment and/or services. Prior to making any referral, the School shall convene a Student study team, if at all possible (given a parent's right to refuse such an option) to determine if alternative interventions are appropriate. All referrals shall immediately be provided to the School Special Education staff and/or the School's contracted service provider for consultation, identification and assessment.

- 13.4 Assessment of Special Education Students. The School will determine what assessments, if any, are necessary and arrange for such assessments for all referred Students, for annual assessments, and for tri-annual assessments.
- 13.5 Individualized Education Program. The School shall be initially responsible for arranging the necessary Individualized Education Program (IEP) meetings. The School shall be responsible for providing adequate meeting arrangements, having the designated representative of the School participate in the IEP meeting, in addition to representatives who are knowledgeable about the regular education program at the School. Further, the School responsibilities shall include documentation of the IEP meeting and the provision of parent rights.
- 13.6 Eligibility and Placement. Decisions regarding eligibility, goals/objectives, program placement and exit from special education shall be the decision of the IEP team. Team membership shall be in compliance with federal law and shall include the designated representative of the School. Services and placement shall be provided to all eligible School Students in accordance with the IDEA and the policies, procedures and requirements of the SELPA.
- 13.7 Interim Placement. For Students who enroll in the School with a current IEP where the IEP team determined that Independent Study is appropriate, it is the responsibility of the School to implement the existing IEP to the extent possible at the School. The School will also require, as part of its admissions process, that prospective Students consent to acquisition of their cumulative files, including all special education files from their prior school. For Students who were previously enrolled in the District, the District agrees to forward the student's cumulative file, including all special education files to the School within ten (10) days of written notification.
- 13.8 Special Educational Services and Programs. The School can contract all or part of its above responsibilities for the provision of special needs services to a third party provider. To the extent that the agreed upon IEP requires educational or related services to be delivered by staff other than the School staff, the School shall provide such services through a contract with a third party special education provider(s). All services required by the IEP will be provided by the School and its contractor(s).
- 13.9 Parent/Guardian Concerns. Parent/Guardian concerns regarding special education services shall be directed to the School. The School shall address the Parent/Guardian concerns. The School shall distribute with its admissions material information pertaining to the provision of special education services.
- 13.10 Complaints. The School shall address, respond, investigate, and take any and all necessary action to respond to all complaints received under, among other things, the uniform complaint procedure, involving special education and IDEA compliance.

- 13.11 Due Process Hearing. The School may initiate a due process hearing on behalf of the Student enrolled in the School as the School determines is legally necessary to meet its responsibilities under federal law.
- 13.12 SELPA Activities and Meetings. The School shall participate in SELPA meetings and activities to the extent allowable under SELPA policies. To the extent that the District and/or SELPA provide training opportunities and/or information regarding special education to site staff, such opportunities/information shall be made available to the School and its staff.
- 13.13. Supervisory Oversight. The District will have “supervisory oversight”, as that term is defined in Ed. Code § 47613, over the School providing Special Education Services. The parties acknowledge that School has responsibility for following the policies and procedures of the SELPA, of which it is a member. In the event the District receives or initiates a complaint or inquiry regarding School's discharge of its responsibilities, it shall forward such complaint or inquiry to School and School shall be solely responsible for responding to such complaint or inquiry. In the event of a dispute between the parties arising out of such complaint or inquiry that the parties are unable or unwilling to resolve, such dispute shall be subject to the dispute resolution process set forth in the MOU. The parties agree that a representative of the SELPA shall be entitled to participate in any dispute resolution proceeding that relates to the School's responsibilities under this Section and/or the District's oversight responsibilities referenced in this Section, and the parties waive any right to object to such participation by SELPA. The oversight services performed by the District referenced in this section, together with the oversight services to be provided by the District pursuant to Section 8, will be subject to the oversight fee provided for in Section 8.3.
- 13.14 Special Education Funding. The SELPA shall provide the School all state or federal revenues that are generated by Students attending the School that are distributed to the SELPA by the state and in accordance with SELPA policies. The parties recognize the funds received for special education purposes from federal and state resources are currently inadequate, and that additional funds are required. It is the intent of the parties that, outside of the above-mentioned funding received by the SELPA, the School will bear financial responsibility for the provision of special education services. The School will be required to pay for all excess costs related to special education services to School Students.

## 14. STANDARDIZED TESTING

- 14.1 State Standardized Testing. The School will administer the California State standardized testing as required by law. Arrangements for ordering, administering, and obtaining reimbursement for the state tests will be done by the School independently from the District. The School is responsible to ensure the School's test scores and data are reported accurately according to law. Upon request, District may provide one (1) testing site for test administration. The District may charge a mutually agreed to usage fee for use of facilities. The School, however, will provide staff to administer the assessments.
- 14.2 English Language Proficiency Assessments for California (ELPAC) or California English Language Development Test (CELDT) Testing. The School will administer the ELPAC and/or CELDT or their successors as required by law. Arrangements for ordering, administering, and being reimbursed for the state tests will be done by the School. The School will insure the School's test scores and data are compiled and reported accurately and on time. In addition, the School will work to identify and designate the status of English Language Learners enrolled at the school. Upon request, District may provide one (1) testing site for test administration and annual training for schools' test administrators. The District may charge a mutually agreed to usage fee for use of facilities.
- 14.3 Staff Development. The School and District agree to communicate regarding District's staff development and training sessions that apply to either administration or interpretation of State tests, and District agrees that if requested by the School, representatives from School staff may choose to attend. If such training is requested by the School or the District offers other training sessions that the School staff may wish to attend, the District will provide an estimate in advance of the anticipated cost of such training sessions, or may provide such training at no cost to the School.

## 15. DISTRICT REPRESENTATIVE TO GOVERNING BOARD

- 15.1 District Representative. The District has the option of appointing a representative to the Corporation's Board under Education Code 47604. Until and unless changed in writing by the District, the District elects at this time not to appoint a representative (*subject to discussion when finalizing the MOU*) to the Corporation's Board. The District may also designate at any time a liaison to the Board who will not be a member but who may attend meetings and receive public board agendas, minutes, and materials.

## 16. NOTIFICATIONS TO SCHOOL PARENTS

- 16.1 Notification of Transferability of High School Courses: The School will notify parents of the transferability of School courses to other high schools and colleges as part of the School Handbook.

## 17. SCHOOL RECORDS

17.1 School Records. The School will be responsible for keeping and maintaining accurate and legal records regarding its business, including, but not limited to, student and personnel records. On behalf of the school, the Corporation will implement policies and procedures regarding content and responsibility for these records and will comply with applicable law regarding retention, confidentiality, and destruction of school records. The District will be provided with a copy of this policy for review upon request. The Corporation and School agree to cooperate with the District regarding input on this policy. The School and District agree to provide any applicable student or personnel records to the other in a timely way. The School or District may charge for the actual cost of providing such records (e.g. copying and mailing). The School and District shall cooperate on maintaining long-term student records. The School and District also agree to cooperate with each other if further assistance beyond student records is needed following a student transfer.

## 18. PERSONNEL AGREEMENT

18.1 Personnel Agreement. As stated in the Charter in Section V.C., Rights of School District Employees, if an employee leaves District employment, from either the sponsoring District or any other district, to work at the charter school, the collective bargaining agreements and District Board policies of that district shall govern the return rights of such employees. The District and the Corporation are separate employers.

Upon request, the School shall provide the District proof of employment of appropriately credentialed teachers at the School for that school year consistent with the qualification requirements for "Teachers" set forth in the Charter. The District reserves the right to review School staffing lists to ensure compliance with applicable law and to determine whether a teacher is deemed to be appropriately credentialed. Flexibility will be given to teachers hired by the School for non-core, non-college preparatory courses as permitted by Education Code Section 47605(l).

## 19. INSURANCE AND INDEMNIFICATION

19.1.1 General liability. The Corporation on behalf of the School shall maintain in force during the term of this Agreement, general and public liability coverage in amounts of not less than One Million (\$1,000,000) Dollars primary and Five Million (\$5,000,000) Dollars excess. The insurance or self-insurance program will include the District as an additional insured or the equivalent thereof, and certificates of insurance will be provided upon request.



19.1.2 Workers' Compensation. The Corporation on behalf of the School agrees to carry workers' compensation insurance to protect its employees at a limit determined by the Labor Code of the State of California and Employers' Liability insurance in the amount of One Million (\$1,000,000) Dollars or its current limit of each, whichever is greater. Proof of such coverage will be furnished to the District upon request.

19.2 Property Insurance. The School shall have the sole responsibility for insuring its personal property and securing property insurance for its facility and/or property.

19.3 Indemnification. The District agrees to indemnify and hold the Corporation and the School and their officers, directors, employees, and agents harmless and free from all claims, actions, audits, losses, liabilities or expenses arising under this agreement that are the responsibility of the District that may arise as a result of the District's acts or omissions in the performance of this agreement except such loss or damage caused solely by the negligence or willful misconduct of the Corporation.

The Corporation and the School agree to indemnify and hold the District and its officers, directors, employees, and agents harmless and free from all claims, actions, audits, losses, liabilities or expenses arising under this agreement that are the responsibility of the School that may arise as a result of the School's acts or omissions in the performance of this agreement, except such loss or damage caused solely by the negligence or willful misconduct of the District.

19.4 Evidence of Coverage. The Corporation on behalf of the School will provide the District evidence of insurance coverage upon request.

## **20. FACILITIES USE AGREEMENT**

20.1 Facilities Use Agreement. Aside from the provision of facilities under Section 14, if the School has a need to use any District facilities, and the District agrees to provide such facilities, the School and District will prepare and approve a Facilities Use Agreement in addition to this MOU. This Agreement will contain the details of the arrangements, including fees, between the District and School for the use of a District facility.

20.2 Proposition 39 Waiver. The District shall have no responsibility to construct, fund, improve, or modernize the School's facility, except to the extent that the facility may be property of the District. The District has no obligation to provide facilities to the School pursuant to Education Code section 47614 throughout the term of its Charter.

## 21. CONSTRUCTION AND SEVERABILITY

- 21.1 Amendments. This agreement may be amended or modified, in whole or in part, only by an agreement in writing developed in the same manner as this agreement, mutually agreed upon and executed by the parties.
- 21.2 Severability. If any provision or any part of this agreement is for any reason held to be invalid and/or unenforceable or contrary to public policy, law, statute, and/or ordinance, the remainder of this agreement shall not be affected thereby and shall remain valid and fully enforceable.
- 21.2 Dispute Resolution. To the extent consistent with the Charter, in the event of a dispute between the School and the District regarding the terms of the Charter or any other issue regarding the School and District relationship, both parties agree to apprise the other, in writing, of the specific disputed issue(s). In the event the initiating party believes the dispute relates to an issue that could potentially lead to revocation of the Charter, this shall be specifically noted in the written dispute statement. Within 30 days of sending written correspondence, or longer if both parties agree, the principal of the School and the District superintendent, or their designees, shall meet and confer in an attempt to resolve the dispute. The designees must be identified and confirmed in writing. If this joint meeting fails to resolve the dispute, the School representative and the District representative shall meet again within 15 days, or longer if both parties agree, to identify a neutral, third party mediator to assist in dispute resolution. Unless jointly agreed, the process involving assistance of a third party mediator shall conclude within 45 days.

All mediation costs and all other costs associated with dispute resolution shall be shared equally by the School and the District, provided that each party shall be solely responsible for its own attorney's fees. The School is entitled to receive funds throughout the term of the Charter. In the event of a dispute between the School and the District, the District shall not be permitted to withhold, as a remedy or otherwise, any funds received on behalf of the School.

In the event the third party mediation process does not result in resolution of the dispute, both parties agree to continue good faith negotiations. If the District indicates in writing that the violation constitutes a severe and imminent threat to the health and safety of the School's students, the District is not required to be referred to mediation, but reserves the right to take any action it deems appropriate to insure the safety of students. The School reserves the right to seek legal redress for any such actions under the law.

In addition to the processes above, the Board will develop, adopt and maintain updated policies and procedures for resolving internal and external disputes and grievances. These procedures will be included in the School and Employee Handbooks.

The District agrees to refer all complaints regarding the School's operations to the School staff and/or the Board for resolution in accordance with the School's adopted policies, except for a complaint related to a severe or imminent threat to the health and safety of the students.

21.3 Termination. Except as otherwise provided in paragraph 12.5 of this MOU pursuant to which either party may separately terminate the provision of one or more of the "Other Services" upon no less than sixty (60) days' notice to the other party, the remaining provisions of this MOU may not be terminated except:

- a) In the event of a material breach of the MOU by a party and in that event only after the non-breaching party provides written notice to the breaching party specifically identifying the breach and a minimum of sixty (60) days opportunity to cure the specified breach in order to avoid termination; or
- b) In the event a party provides notification to the other party of its intent to terminate the MOU no less than sixty (60) days prior to the expiration of the existing charter term. Termination of this MOU under this subsection 21.3.b shall occur on the date the existing charter term ends.

In the event of termination, any amounts owed as of the date of termination shall be paid within sixty (60) days of such date. The parties' indemnity obligations and rights with respect to any liabilities and claims for damages, death, sickness or injury to persons or property from acts and/or omissions during the term of this Agreement shall survive the termination or expiration of this Agreement.

21.4 Charter School Governance. The Corporation is incorporated as a California non-profit public benefit corporation. The School will be governed by the Board of Directors pursuant to its bylaws.

The Board will adhere to all applicable laws for non-profit public benefit corporations operating a charter school, including but not limited to the laws regarding interested parties and conflict of interest. In addition, the Board agrees to conduct its business in compliance with all applicable sections of the Ralph M. Brown Act (Open Meeting Laws). The Board will adopt and regularly update a Conflict of Interest Code under the Political Reform Act. The Board will also adhere to any additional statutes or requirements regarding charter school governance that set in place that are specifically applicable to California charter schools.

21.5 Notifications. All notices, requests and other communications (collectively "Notices") under this agreement given to or by the parties shall be in writing. Notices shall be deemed to have been duly given on the date of service if personally served on the party to whom the Notice is to be given, or seventy two (72) hours after mailing by United States first class mail, registered or certified mail, postage pre-paid, and addressed to the party to whom Notice is to be given at the proper addresses as follows:

SAMPLE Memorandum of Understanding between TBD School District and California Online Public Schools for  
California Connections Academy \_\_\_\_ (Region) \_\_\_\_\_ Charter School

To the District at:

\_\_\_\_ (Name) \_\_\_\_\_ School District  
Attn: Superintendent  
\_\_\_\_ ( Street Address) \_\_\_\_\_  
\_\_\_\_ ( City, State, Zip) \_\_\_\_\_

To the Corporation and the School at:

California Connections Academy \_\_\_\_ (Region) \_\_\_\_\_ Charter School  
Procopio, Cory, Hargreaves & Savitch LLP  
525 B Street, Suite 2200  
San Diego, CA 92101  
Attn: Board President, c/o Greg Moser

**IN WITNESS WHEREOF**, the parties to this agreement have duly executed it on the day  
and year set forth below.

On behalf of the \_\_\_\_ (Name) \_\_\_\_\_ School District:

By \_\_\_\_\_ Date: \_\_\_\_\_  
\_\_\_\_ (Name) \_\_\_\_\_, Superintendent

On behalf of California Online Public Schools for California Connections Academy  
\_\_\_\_ (Region) \_\_\_\_\_ Charter School:

By \_\_\_\_\_ Date: \_\_\_\_\_  
\_\_\_\_ (Name) \_\_\_\_\_ President, California Online Public Schools

# The Common Message

**2018-19 First Interim**



**BASC**  
Business and Administration  
Steering Committee

# Sources

<b>Association of California School Administrators</b>
<b>Bob Blattner and Associates</b>
<b>Bob Canavan, Federal Management Strategies</b>
<b>California Association of School Business Officials</b>
<b>California Collaborative for Educational Excellence</b>
<b>California Department of Education</b>
<b>California Department of Finance</b>
<b>California State Board of Education</b>
<b>California School Boards Association</b>
<b>California School Information Services</b>
<b>Capitol Advisors</b>
<b>Fiscal Crisis and Management Assistance Team</b>
<b>Ball/Frost Group, LLC</b>
<b>K-12 High Speed Network</b>
<b>Michael Hulsizer, BASC Liaison &amp; Kern County Superintendent of Schools</b>
<b>National Forest Counties and Schools Coalition</b>
<b>School Services of California</b>
<b>Schools for Sound Finance (SF2)</b>
<b>Small School Districts' Association</b>
<b>Statewide LEC Co-chairs</b>
<b>WestEd</b>

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## First Interim Budget Key Guidance

Since adoption of the 2018-19 budget this past June, actual General Fund revenue collections for the prior year (May-June) and current year (July-September) are above projections by \$1.541 billion and \$1.032 billion, respectively.

Despite these overall increases in General Fund revenue, LEAs should NOT assume Prop. 98 will experience an upward adjustment in the 2018-19 spending guarantee because no outstanding Prop. 98 maintenance factor exists in 2018-19, and Prop. 98 is funded at Test 2 in 2018-19.

A new Governor will take office in January 2019, and LEAs should remain cautious regarding priority commitments to LCFF and discretionary funding until the Governor reveals his priorities.

The projected COLA for 2019-20 (2.57%) will require approximately \$1.6 billion in new, ongoing and available Prop. 98 growth for K-12 education in the budget year. Given the unique risks to Prop. 98 growth in 2019-20, LEAs should take additional caution in making any out-year expenditure commitments until the new administration's budget projections and proposals are released in January.

## Significant Changes Since Adopted Budget

The CDE has certified that overall **2017-18 ADA declined** from 2016-17 and, as a consequence, the ADA hold harmless provision would no longer apply to the calculation of the 2018-19 guarantee. Districts should expect the administration to propose a reduction in the minimum guarantee in January related to the 2017-18 ADA decline.

The CDE projected \$1,976 per eligible student for the **Low Performance Student Block Grant (LPSBG)**. The LPSBG requires no application but does require a plan to be developed.

The CDE now projects \$177 per FTE for the **Classified Professional Block Grant**.

## Planning Factors for 2018-19 and MYPs

Key planning factors for LEAs to incorporate into their 2018-19 budgets and MYPs are listed below and are based on the latest information available.



<b>Planning Factor</b>	<b>2018-19</b>	<b>2019-20</b>	<b>2020-21</b>
<b>Statutory COLA (DOF)</b>	2.71%	2.57%	2.67%
<b>LCFF COLA (school districts and charter schools)</b>	3.70%		
<b>LCFF Gap Funding Percentage (DOF)</b>	100.00%		
<b>LCFF Gap Funding (in millions)</b>	\$3,556		
<b>STRS Employer Statutory Rates (statute until 2020-21)</b>	16.28%	18.13%	19.10%
<b>PERS Employer Projected Rates (September 2018)</b>	18.062%	20.7%	23.4%
<b>Lottery – Unrestricted per ADA (did not change)</b>	\$151.00	\$151.00	\$151.00
<b>Lottery – Prop. 20 per ADA (did not change)</b>	\$53.00	\$53.00	\$53.00
<b>Mandated Cost per ADA for One-Time (may be adjusted for some districts for overpayment of MAA and LEA Billing Claims)</b>	\$184.00		
<b>Mandated Block Grant for Districts – K-8 per ADA (increase by COLA 2.71%, etc.)</b>	\$31.16	\$31.96	\$32.81
<b>Mandated Block Grant for Districts – 9-12 per ADA (increase by COLA 2.71%, etc.)</b>	\$59.83	\$61.37	\$63.01
<b>Mandated Block Grant for Charters – K-8 per ADA (increase by COLA 2.71%, etc.)</b>	\$16.33	\$16.75	\$17.20
<b>Mandated Block Grant for Charters – 9-12 per ADA (increase by COLA 2.71%, etc.)</b>	\$45.23	\$46.39	\$47.63
<b>State Preschool (CSPP) Part-Day Daily Reimbursement Rate</b>	\$29.90	\$29.90	\$29.90

Planning Factor	2018-19	2019-20	2020-21
State Preschool (CSPP) Full-Day Daily Reimbursement Rate	\$48.28	\$48.28	\$48.28
General Child Care (CCTR) Daily Reimbursement Rate	\$47.98	\$47.98	\$47.98
<b>Routine Restricted Maintenance Account</b>  <b>All LEAs that received ANY School Facility Program funding are required to deposit 3% into their Routine Restricted Maintenance Account in the year in which the LCFF is fully implemented, which is 2019-20.</b>  <b>If district received Prop. 51 funds in 2017-18 or 2018-19, the minimum 3% RRMA contribution is required in 2018-19.</b>	Greater of: Lesser of 3% or 2014-15 amount or 2%	Equal or greater than 3% of total GF expenditures	Equal or greater than 3% of total GF expenditures

## Reserves/Reserve Cap

County offices continue to reinforce the need for reserves in excess of the minimum reserve for economic uncertainty. The required reserve for economic uncertainty represents only a few weeks of payroll for most districts. The Government Finance Officers Association recommends reserves, at minimum, equal to two months of average general fund operating expenditures, or about 17%. In determining an appropriate level of reserves, districts should consider multiple external and local factors including but not limited to:

- State and federal economic forecasts and volatility.
- Unknown impacts of federal tax reform on state revenue.
- Forecasted revenue changes versus projected expenditure increases in budget and multiyear projection years.
- Ending balance impact of various district enrollment scenarios.
- Cash flow requirements and the relationship between budgeted reserves and actual cash on hand.
- Savings for future one-time planned expenditures.
- Protection against unanticipated/unbudgeted expenditures.
- Credit ratings and long-term borrowing costs.

**Prudent reserves afford districts and their governing boards time to thoughtfully identify and implement budget adjustments over time. Inadequate reserves force districts to react quickly, often causing significant disruption to student programs and employees.**

The district reserve cap is not activated in 2018-19 and is not expected to be activated in 2019-20. SB 751 modified Education Code 42127.01 (the district reserve cap), and these changes became effective January 1, 2018. The Public School System Stabilization Account (PSSSA) must now contain a balance of 3% or greater of the Prop. 98 amount in that year to trigger the reserve cap in the following year. Reserves would be capped at 10% (including designated and undesignated reserves Fund 01 and Fund 17) as long as the amount in the PSSSA remained at 3% or greater of the Prop. 98 amount in each preceding year. Basic aid and small school districts (those with fewer than 2,501 ADA) are exempted from the reserve cap. The four conditions that must be met to enable a transfer to the PSSSA are:

1. Prop. 98 is funded based on Test 1.
2. Prop. 98 maintenance factor is fully repaid.
3. Prop. 98 is sufficient for enrollment growth and statutory COLA.
4. At least 8% of state general fund revenues come from capital gains.

The likelihood of the reserve cap being activated in future years remains low but if this does come to pass, districts have the option to request a waiver from the county superintendent of schools for up to two consecutive years in a three-year period. Districts are advised to manage and maintain prudent reserves without consideration of the reserve cap language included in Education Code 42127.01.

## **Negotiations**

Although the adopted budget included one-time discretionary funds (\$184/student) and a 2018-19 LCFF augmentation of 0.99%, there is little expectation of any new dollars until the fiscal year 2019-20 state budget is adopted. In the meantime, these considerations are key:

- Full funding of the LCFF may provide a slight increase in funding in the budget year; however, estimates of future year increases are limited to COLA alone – or less than 3% per year.
- Full funding of the LCFF also requires districts to maintain a 24:1 class size ratio for kindergarten through grade 3 unless a collectively bargained alternative exists.
- Full funding of the LCFF also means that supplemental and concentration grants are fully funded, which may require an increase in expenditures for districts that were gradually increasing their grant amount by the annual gap factor.

Despite flattening revenues, escalating fixed expenditures are difficult to manage and, accordingly, may ultimately threaten fiscal solvency for many districts:

- It is unlikely that the annual COLA on the LCFF will be sufficient to fund the annual cost increases associated with step and column and the escalating employer retirement system costs at most districts. For these districts, any additional ongoing increases to the salary schedule are highly problematic in maintaining a balanced budget.
- Many districts adopted a practice of multiyear agreements during the implementation phase of the LCFF. However, continuing this practice now that revenue growth will slow, could lead to a rapid deterioration of fiscal solvency, and is strongly discouraged.

Many other risk factors on the horizon affect the negotiating environment and the affordability of collective bargaining agreements:

- The impact to health care costs resulting from the elimination of the individual mandate under the Affordable Care Act.
- Ongoing increases in the state minimum wage; start negotiations with your classified association regarding minimum wage increases if you have not already done so.
- The increasing risk of an economic downturn as the expansion cycle exceeds most previous cycles.

Regardless of the economic environment, districts always must be prepared to respond to employee requests for staff compensation and benefit increases. Nonetheless, fiscal solvency is paramount in negotiations and, if it is to be sustained, demands reasonable and accurate revenue and expenditure projections. Maintaining fiscal solvency while maximizing services to students with available financial resources will be a continuing challenge. It is inevitable that cost reductions will be required for many districts in the budget year and/or the out years of the multiyear financial projection period.

## **Local Control and Accountability Plan (LCAP)**

In developing and adopting their 2018-19 first interim reports, LEAs should:

- 1) Review progress to date on implementation of planned actions and services in their adopted LCAPs,
- 2) Begin gathering and reporting any preliminary data available for the next annual update, and
- 3) Transparently assess any budgetary changes in the first interim report that might impact the LEA's ability to implement the LCAP going forward.

In addition, LEAs should review local data and CALPADS submissions to anticipate possible areas of concern regarding budget priorities that may surface when the 2018 California School Dashboard is released in December 2018.

To prepare for the development of 2019-20 LCAPs, LEAs should review the current LCAP to see if amendments will need to be made to align with the federal addendum that will be required with next year's LCAP. The addendum requires the LEA to answer strategy and alignment questions for each of the federal programs they will be operating per the following instructions:

**Strategy:** Explain the LEA's strategy for using federal funds to supplement and enhance local priorities or initiatives funded with state funds, as reflected in the LEA's LCAP. This shall include describing the rationale/evidence for the selected use(s) of federal funds within the context of the LEA's broader strategy reflected in the LCAP.

**Alignment:** Describe the efforts that the LEA will take to align use of federal funds with activities funded by state and local funds and, as applicable, across different federal grant programs.

**LEAs need to be aware that further changes to the LCAP template are coming.**

The 2018-19 Budget Act (AB 1808) added Education Code 52064.1, which calls for the creation of a "local control funding formula budget overview for parents" that will be "attached as a cover" to the front of adopted LCAPs for 2019-20. The template for this overview shall be developed by CDE by December 31, 2018 (subject to approval by the executive director of the State Board of Education). Some of the information called for in the budget overview duplicates budget information in the LCAP Plan Summary section. Consequently, CDE anticipates taking minor revisions to the LCAP Template to the SBE for approval in January to remove redundant information in the Plan Summary.

Budget cleanup bill AB 1840, signed by the Governor in September, calls for further significant changes to the LCAP, including new expenditure summary tables. However, the actual revisions to the template are to be adopted by the SBE by January 31, 2020 and are not expected to be effective until the 2020-21 – 2022-23 LCAP cycle commencing with the 2020-21 school year.

The stated intent of the LCAP template revisions called for in AB 1808 and AB 1840 is to make the information easier for constituents – especially parents – to understand, and to improve fiscal transparency. In addition, legislative language appears to highlight the desire to see LCAPs used as a comprehensive planning tool, and not just as a plan for supplemental and concentration grant funds.

## **One-Time Discretionary Funding**

The enacted 2018-19 budget provides \$1.1 billion (estimated \$184 per ADA) in one-time Prop. 98 discretionary funding for school districts, charter schools and COEs. These one-time discretionary dollars are less than the amount included in the May Revision due to the increased funding of other education priorities such as the LCFF and Career Technical Education.

- As in prior years, these funds will offset outstanding local mandate claims owed to LEAs.

- Funds may be used for any one-time purpose determined by the LEA's governing board. The legislative intent was to prioritize the use of these funds for professional development, teacher induction, instructional materials, and technology infrastructure.
- Notification of allocation is anticipated by January 31, 2019.
- Funds will be allocated to LEAs based on 2017-18 P-2 ADA and will be released in January and June 2019.
- However, there is a provision to reduce a school district's one-time funds to repay any disallowed claims under the School-Based Medi-Cal Administrative Activities program or under the Medi-Cal Billing Option program. School districts that owe for disallowed claims will see a reduction in both the January and June disbursement of one-time discretionary funds. School districts should contact their local educational consortium or local governmental agency if they are unsure of the amount they were overpaid.

## Low-Performing Students Block Grant

The budget includes a one-time block grant to help address the achievement gap for all students. CDE currently estimates the funding at \$1,976 per eligible pupil. The funding will be distributed on a per-pupil basis to school districts, charter schools and COEs for pupils that are identified as low-performing on the latest available state English language arts or mathematics assessments (2016-17 data) and who are neither identified for special education services nor identified as low-income, English learner or foster youth. "Low-performing" is defined as not meeting academic achievement standards on the most recently available (2016-17) results of the CAASPP test in any of the following ways:

1. Does not meet achievement standard, "level 1," in both English language arts and mathematics.
2. Does not meet achievement standard, "level 1," in either English language arts or mathematics, and nearly meets the achievement standard, "level 2," in the other subject.
3. Does not meet achievement standard, "level 1," in either English language arts or mathematics, and does not have a valid score for the other subject.

All measures of a pupil's eligibility – low-performing, eligible for special education services, and identification as low-income, English learner or foster youth – should be for the same fiscal year.

To determine eligibility, districts will, therefore, subtract low-income, EL, foster youth and special education students from their low-performing population, and the remainder is the count that is eligible for this block grant. CDE will determine the eligible pupil count and automatically

apportion the block grant, currently estimated at \$1,976 per eligible pupil. However, there are conditions of receipt as noted below.

These block grant funds may be expended through 2020-21 and shall be used for evidence-based services that directly support pupil academic achievement, including, but not limited to, professional development activities for certificated staff, instructional materials, or additional supports for pupils.

**As a condition for receiving grant funds, the LEA shall develop a plan describing how the funds will increase or improve evidence-based services for the identified pupils to accelerate increases in academic achievement, and how the effectiveness of the services will be measured. The plan shall include information regarding how the services align with and are described in the LEA's LCAP. Finally, the plan shall be discussed and adopted at a regularly scheduled board meeting of the LEA's governing body. The LEA must report to the Superintendent of Public Instruction regarding the adopted plan on or before March 1, 2019.** The proposed code does not identify a specific plan template or application process. We anticipate these details will be forthcoming from CDE as the process to administer the block grant is developed.

Grant recipients must also report to the SPI on or before **November 1, 2021** regarding the implementation of the plan including strategies used and whether the plan increased the academic performance of the target pupils.

More information regarding the block grant may be found here:  
<https://www.cde.ca.gov/fg/aa/ca/lpsbg.asp>

## **Early Childhood Education**

### **Child Care and State Preschool**

The enacted state budget includes:

- A 2.71% COLA for both Prop. 98 and non-Prop. 98 direct service programs.
- A further 2.795% Standard Reimbursement Rate increase.
- Permanent extension of the Regional Market Reimbursement Rate hold harmless.
- Full year implementation of 2017 Budget Act investments including the final round of the increased 2,959 full-day State Preschool slots, to begin April 1, 2019.
- Increases in CalWORKs Stage 2 and Stage 3 childcare funding to reflect increases in the number of CalWORKs child care cases and cost of care.

- Creation of the one-time \$167 million Inclusive Early Education Expansion Program.
- Funding for 2,100 ongoing additional Alternative Payment childcare slots (\$19 million non-Prop. 98), and 11,307 temporary additional AP slots through June 30, 2022 (\$409.2 million limited-term federal funds).
- Increases to the adjustment factors for infants and toddlers served in a child day care center or a family childcare home. Adjustment factors for children with special needs were also increased (\$40.2 million non-Prop. 98, increasing to \$80.3 million in future years).
- The creation of a new county office Inclusive Early Care Pilot Program (\$10 million one-time).
- \$5 million one-time for licensed child care teacher professional development.
- \$5 million one-time for the California Child Care Initiative Program.
- \$6 million for other one-time quality activities, with priority given to activities that support state compliance with federal consumer education requirements.

In addition, the budget trailer bill (AB 1808) reaffirms the proposal in the 2017-18 budget to allow licensing flexibility for State Preschool programs operated by an LEA. The bill requires the CDE to adopt regulations for California State Preschool programs under Title 5, on or before July 1, 2019, related to outdoor shade, drinking water, restrooms, supervision of children, and maintenance of indoor and outdoor space. In addition, the Uniform Complaint Procedures section of the bill adds related provisions establishing a process for complaints related to the preschool health and safety requirements.

## Special Education

The enacted state budget provides a 2.71% COLA estimated at \$14.24 per ADA. This brings the AB 602 estimated statewide target rate to \$539.68 per ADA after removing the 2017-18 program specialist and regionalized services funding from the calculation.

**Local Solutions Grant Program.** The 2018-19 state budget includes funding to support the recruitment, preparation, and support of new special education teachers. A total of \$50 million is available for competitive grants to LEAs. Grants of up to \$20,000 per teacher participant that the identified solution proposes to support will be provided and these, along with required matching contributions, may be used for local efforts to recruit, develop, and retain special education teachers including but not limited to teacher service scholarships, student debt payment, living stipends for newly credentialed teachers who earned an education specialist credential, recruitment of former special education or other teachers who may be interested in working as special education teachers, signing bonuses for newly credentialed teachers who earn an



education specialist credential, service awards, mentors for existing teachers, professional learning communities, teacher career pathways or other solutions that address a local need for special education teachers. Proposals must be received by the Commission by 5 p.m. PDT on October 30, 2018. See the Commission on Teacher Credentialing website (<https://www.ctc.ca.gov/educator-prep/grant-funded-programs>) for detailed program information.

**Inclusive Early Education Expansion Program.** For the 2018-19 fiscal year, \$167,242,000 is appropriated for allocation to LEAs for the Inclusive Early Education Expansion Program. Grants shall be awarded on a competitive basis and may be used for one-time infrastructure costs only, including, but not limited to, adaptive and universal design facility renovations, adaptive equipment, and professional development. Funds shall not be used for ongoing expenditures and shall be available for encumbrance until June 30, 2023. Grant applications must include increasing access to subsidized inclusive early care and education programs for children up to five years of age, including those defined as “children with exceptional needs” pursuant to Section 8208, in low-income and high-need communities. Proposals shall quantify the number of additional subsidized children proposed to be served, including children with exceptional needs. A plan to fiscally sustain subsidized spaces or programs created by grant funds beyond the grant period is required. Subsidies may be funded with private, local, state, or federal funds and shall demonstrate a reasonable expectation of sustainability. The identification of local resources to contribute 33% of the total award amount is required and local resources may include in-kind contributions. Proposals must include resources necessary to support lead agency professional development to allow staff to develop the knowledge and skills required to implement effective inclusive practices and fiscal sustainability and must also include a description of the special education expertise to be utilized to ensure the funds are used in a high-quality, inclusive manner.

**Local Plan.** Districts and county offices are now required to post on their websites any special education local plan, annual budget plan and annual services plan that was approved or updated (revised) by their governing board. County offices are also required to post district special education local plans or links to the district local plans on the COE website. A copy of the special education local plan, including policies and procedures and the annual budget and service plans, shall be on file at the SELPA office and at the office of each participating LEA and shall be accessible to any interested party.

On or before July 1, 2019, CDE will develop local plan templates that shall be used by SELPAs, districts, and county superintendents of schools. Commencing July 1, 2020, each local plan shall include an annual assurances support plan. The purpose of the annual assurances support plan is to demonstrate how the SELPA and its participating agencies are coordinating to ensure effective outcomes for pupils with disabilities. The department shall develop a template for the annual assurances support plan by March 31, 2019.

**LCAP.** School districts must consult with SELPA administrators to determine that specific actions for individuals with exceptional needs are included in the LCAP or annual update to the LCAP, and are consistent with strategies included in the annual assurances support plan (when available) for the education of individuals with exceptional needs.

## Career Technical Education

The 2015 Budget Act established the Career Technical Education (CTE) Incentive Grant Program to incentivize LEAs to establish and maintain CTE programs during the phase in of the LCFF. The program provided \$400 million, \$300 million, and \$200 million Prop. 98 General Fund in 2015-16, 2016-17, and 2017-18, respectively. Funds provided through this initial three-year investment must be fully spent by June 30, 2019. The state will not allow carryover after this date.

The 2018 Budget Act reflects a compromise among several CTE proposals discussed in the Legislature during the budget process. The Budget Act contains \$164 million in ongoing funding (including \$14 million for technical assistance and administrative costs) for the K-12 Strong Workforce Program and \$150 million in ongoing funding for the CTE Incentive Grant, administered by the CDE.

The budget trailer bill (AB 1808) maintained the following adjustments and clarifications to the K-12 Strong Workforce Program Proposal made in May:

- Allocates funding through the Community Colleges Chancellor's Office to existing regional consortia based on these factors in each region: the unemployment rate (33%), the region's total average daily attendance for students in grades 7 to 12 (33%), and the proportion of projected job openings (34%).
- Specifies that grant decisions for the K-12 component are made exclusively by the K-12 Selection Committee specified in the trailer bill language.
- Expands and clarifies technical assistance roles within the program.
- Provides resources to consortia for administering the regional grant process, including resources to support the K-12 Selection Committee duties.

The proposed schedule for the K-12 Strong Workforce Program is as follows:

Application form for project submissions available to LEAs – **January 7, 2019**

- K-12 Selection Committees in place – **January 7, 2019.**
- Project submission deadlines – **March 15, 2019.**
- Training for K-12 Selection Committees on project submission rubric. **January 7-March 15.**
- Allocation Notification – **April 30, 2019.**
- NOVA training for LEAs receiving allocations – **April 30-June 15, 2019.**

- Allocations released to funded projects – **mid-June**.

The proposed schedule for the Career Technical Education Incentive Grant (CTEIG):

- November 2018: California Workforce Pathways Joint Advisory Committee to review and make recommendations regarding the metrics per E.C. 53071(c).
- December 2018: Mid-December – CTEIG application to be released to field.
- January 2019: January 25 – CTEIG application is due to CDE.
- March 2019: SBE Board Item – Will publicize a review of allocation formula, specific funding amounts, purposes for which grant funds may be used, allowable and non-allowable expenditures, and the number or grants to be awarded.
- 2019 May: LEAs to receive grant award notifications.
- 2019 June: Mid-June will be the 1<sup>st</sup> release of funds to the field.

Both grant programs are competitive and require a funding match. The K-12 component of the Strong Workforce Program requires either a one-to-one or a two-to-one match depending on the structure of each recipient's program. The CTEIG requires a two-to-one match.

The Community Colleges Chancellor's Office will host a series of regional consortium engagement meetings around the K-12 Strong Workforce Program from October 31, 2018- November 14, 2018. More information can be found on the California Community Colleges Doing What Matters website, under the Strong Workforce tab:  
<http://doingwhatmatters.cccco.edu/StrongWorkforce.aspx>

### Other Grants

LEAs have many new and targeted restricted funding opportunities as part of the 2018-19 state budget. LEAs should update the first interim report with the anticipated estimates of receiving any of these restricted funds. However, since several of these funding opportunities are not entitlements and are connected to a competitive grant process or have terms and conditions to which an LEA must adhere to receive the funding, it is important to determine if the district will be eligible for the funds before including the amounts in the budget.

Following is a brief list of the funding opportunities:

### **Special Education Local Plan Area (SELPA) – Assistance for LEAs on Special Education Outcomes**

\$10 million in ongoing Prop. 98 funding to incorporate SELPAs into the state system of support through the establishment of special education resource leads (SELPA leads) who will work with COEs to improve pupil outcomes. There will be two types of leads: SELPA systems

improvement leads and SELPA content leads. The competitive application process is under way for the SELPA systems improvement leads, with applications due October 26, 2018. A separate application for SELPA content leads will be available in mid-November 2018.

### **Classified School Employees Professional Development Block Grant Program**

\$50 million in one-time Prop. 98 funding for the Classified School Employee Professional Development Block Grant Program. This program will provide \$45 million to LEAs with a one-time grant based on the number of full-time equivalent classified school employees employed by the LEA as reported in the California Basic Educational Data System in the immediately preceding fiscal year. First priority for the funds is for the implementation of school safety plans, and the funding may be expended for any purpose described in EC Section 45391. The CDE will be required to apportion these funds to school districts, county offices of education, and charter schools as block grant funds. CDE currently estimates \$177 per FTE. The remaining \$5 million is provided to the California Community Colleges Chancellor's Office.

### **Classified School Employees Summer Assistance Program**

\$50 million in one-time Prop. 98 funding is provided for this program. Under the provisions of the program LEAs will have the ability to elect to participate. If LEAs decide to participate, the following requirements apply:

1. An LEA must notify classified employees by January 1, 2019, that it has elected to participate in the program for the 2019-20 school year.
2. Once an LEA provides notification to classified employees of its intent to participate, the LEA is prohibited from reversing its decision to participate in the program for the 2019-20 school year.
3. To be eligible to participate, a classified employee must be employed for less than 12 months per fiscal year and must have been employed for at least one year at the time the classified employee elects to participate.
4. Eligible classified employees that elect to participate in the program must notify their employer in writing on a CDE-developed form by March 1, 2019. Employees must specify the amount to be withheld from their monthly paycheck during the 2019-20 school year and whether they want to have the amounts withheld paid out during the summer recess period in one or two payments. Participating classified employees may elect to have up to 10% of their monthly pay withheld during the school year.
5. A classified employee whose regular annual pay is more than two times the full-time pay of a classified employee paid at the state minimum wage is NOT eligible to participate.
6. LEAs that elect to participate in the program must notify the CDE by April 1, 2019 and provide the number of classified employees that have elected to

participate and the total estimated amount to be withheld from their paychecks for the 2019-20 school year.

7. The CDE must notify participating LEAs by May 1, 2019, of the estimated amount of state match funding that a participating classified employee can expect to receive as a result of participating in the program. If the funding provided is insufficient to provide \$1 for each \$1 that has been withheld from participating classified employee monthly paychecks, the CDE must notify LEAs of the expected prorated amount of state match funds that a participating classified employee can expect to receive.
8. LEAs must notify participating classified employees by June 1, 2019, of the amount of estimated state match funds that a participating classified employee can expect to receive. After receiving that notification, a classified employee may withdraw his or her election to participate in the program or reduce the amount to be withheld from his or her paycheck by notifying his or her employing LEA within 30 days after the start of the school year.
9. The LEA must deposit the amounts withheld from participating classified employees' monthly paychecks in a separate account.
10. A classified employee that separates from employment with an LEA during the 2019-20 school year may request from the LEA any pay withheld from his or her paycheck. However, the classified employee will not be entitled to receive any state match funds provided pursuant to this section.
11. Participating LEAs must request payment from the CDE on or before July 31, 2020, and the CDE must apportion funds within 30 days of receiving a request for payment by the participating LEA.
12. The CDE shall apportion funds to participating LEAs to provide a participating classified employee up to \$1 for each \$1 that he or she has elected to have withheld from monthly paychecks. During the summer recess period, the LEA would be required to pay the participating classified employee from the program fund the amounts withheld in accordance with the classified employee's choices, plus the amount apportioned by the CDE that is attributable to the amount withheld from that classified employee's paychecks during the school year.
13. The state match funding shall not be considered compensation for the purposes of determining retirement benefits for PERS or STRS.

### **Teacher Residency Grants**

The 2018-19 state budget includes funding to support the development and implementation of teacher residency programs. A total of \$75 million is provided for competitive grants for LEAs, with \$50 million allocated for the preparation of special education residents and \$25 million allocated for the preparation of STEM and/or bilingual residents. The grants can be up to \$20,000 per teacher and require a matching local contribution, which can include an in-kind

match of mentor teacher personnel costs or other personnel costs related to the Teacher Residency Grant Program, provided by the grant recipient.

A teacher residency program is a partnership between an LEA and an institution of higher education with a commission-approved preliminary teacher preparation program in which a prospective teacher teaches at least one-half time alongside a teacher of record, who is designated as the experienced mentor teacher, for at least one full school year while engaging in initial preparation coursework. Eligible applicants for funding opportunities through the grant program are school districts, COEs, charter schools, regional occupational centers or programs operated by a joint powers authority, and nonpublic, nonsectarian schools as defined in Section 56034 of the Education Code.

The Commission on Teacher Credentialing (CTC) will release three separate Requests for Proposals (RFPs) for Teacher Residency grants in 2018-19. In the event of insufficient demand for the funds available, there may be additional opportunities to apply for residency funds in subsequent years. The RFP due date for round one has passed and grant recipients have been announced. See the CTC website (<https://www.ctc.ca.gov/educator-prep/grant-funded-programs>) for round one grant recipient information and important dates and details regarding round 2 and 3 grant opportunities.

### **Other Teacher Residency Programs**

\$25 million is provided to the CTC for the 2018-19 fiscal year to establish the Teacher Residency Grant Program to provide one-time competitive grants to develop new or expand existing teacher residency programs that recruit and support the preparation of bilingual education, science, technology, engineering, or mathematics teachers. There are similar program requirements as above, with a focus on bilingual education, science, technology, engineering, or mathematics teachers, as applicable.

### **ASES: Kids Code Grant Program**

\$15 million for CDE to provide one-time grant funds to eligible after school education and safety programs that focus on computer coding as part of their curriculum. The funding will be available for the 2018-19, 2019-20 and 2020-21 fiscal years.

### **Fire-Related Property Tax Backfill**

\$12.3 million is provided to backfill special education programs and basic aid districts for fire-related property tax revenue reductions to LEAs in areas impacted by the wildfires that began in northern California in October 2017 and in southern California in December 2017.

## **Interest Earnings**

In Santa Cruz County, interest earnings are estimated at 2% for the current fiscal year. Future years are difficult to project so at this point Districts can maintain this level of interest earnings through the multi-year projections.

## Basic Aid

Some districts may be transitioning out of basic aid status and will need to work closely with the County Office of Education to track the budgetary and cash flow implications of the transition. The guarantee of a minimum of \$200 per ADA from the Education Protection Account (EPA) is dependent on basic aid status, and districts that transition out of basic aid will lose this additional EPA revenue for every state dollar they receive as a state-funded LCFF district. In addition, under current law, districts that were basic aid in 2012-13, and lost their basic aid status during the transition to full implementation, will continue to have their Minimum State Aid (MSA) amount reduced by their 2012-13 fair share reduction amount.

Basic Aid districts should not exceed the standard CPI increase of 2% per year when making annual projections for increases in property tax revenues.

## Summary

The Common Message is devised to assist LEAs in developing budgets and interim reports. How this information affects each LEA is unique. With this in mind, LEAs should evaluate their individual educational and financial risks and work closely with the County Office of Education on their budget assumptions and financial projections.