

Blue Oak Charter School
450 W. East Avenue, Chico, CA 95926
CHARTER COUNCIL
REGULAR MEETING

Join Zoom Meeting

<https://zoom.us/j/99715488751?pwd=dHlwaHY2eW9pbmZsWklMRFFrWEh0QT09>

Meeting ID: 997 1548 8751

Passcode: c91ziZ

Tuesday, February 16th, 2021 - 6:00 PM

Vision: To be a model for successful education of the whole child.

*Mission: To nurture and deepen each child's academic and creative capacities using methods inspired by
Waldorf education in a public school setting.*

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Update: In Compliance with the Governor of California's "Safer-at-Home Order" due to COVID-19, the Blue Oak Charter Council will be conducting meetings virtually until further notice. This means there will be no specific physical meeting place; the meeting will be held remotely. Public participation continues to be welcomed and encouraged to those who join via Zoom and raise their hand. The chat bar will not be available to the public during the Zoom meetings to support the sanctity of the meeting.

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The Blue Oak Charter Council reserves the right to take action on any item on the agenda.

AGENDA

OPEN SESSION - 6:00 PM

1. OPENING

- 1.1. Call Meeting to Order
- 1.2. Roll Call of Council Members and Establish Quorum
- 1.3. Invocation - School Verse Read

"This is our school, May peace dwell here, May the rooms be full of contentment. May love abide here, Love of one another, Love of our school, Love of life itself. Let us remember that as many hands build a house, So many hearts build a school."

- 1.4. Agenda Modifications
- 1.5. Audience to Address the Council

This is an opportunity for members of the community to address the committee concerning items not on the agenda. Persons addressing the Committee will be allowed a maximum of three (3) minutes for their presentation. The chair may establish a maximum speaking time for any item.

Persons may not yield their time to another speaker (Gov. Code § 54954.3)

2. CONSENT AGENDA

- 2.1. Approve Minutes from January 19th, 2021 and January 27th, 2021
- 2.2. Charter Impact Monthly Report Jim Weber, Charter Impact
 - 2.2.1. Attendance and Enrollment
 - 2.2.2. Cash Flow
 - 2.2.3. Balance Sheet Detail
 - 2.2.4. Warrants/Aged Payable
 - 2.2.5. Point of Sale Transactions/Check Register
 - 2.2.5.1. December and January
 - 2.2.6. Actual to Budget Summary
- 2.3. Accept Donations

3. CLOSED SESSION

- 3.1. Real Estate Susan Domenighini
 - Conference with Real Property Negotiations (§ 54956.8)**

4. GOVERNANCE

- 4.1. Vice Chair Nomination
- 4.2. Establish Facilities Committee
- 4.3. Finance Committee Chelsea Parker
- 4.4. Policy Review Susan Domenighini
 - 4.4.1. Final Pay Policy
- 4.5. Parent Council Report Trisha Atehortua
- 4.6. Strategic Plan Review in May
- 4.7. Review of Council Members Term Lengths
- 4.8. Written Meeting Norms Chelsea Parker
 - 4.8.1. Roberts Rule
 - 4.8.2. In-Person Meetings
 - 4.8.3. Speaker Cards
- 4.9. What Parents Can Do to Get Action on a Concern
 - 4.9.1. Informal Complaint Process
- 4.10. Marketing Messaging
- 4.11. SELPA Local Plan B and Participation Agreement
- 4.12. Interim Charter Council Member Election

5. FACULTY

- 5.1. Grade Level Report Riley Murray & Brianna Lee

6. ADMINISTRATION

- 6.1. Executive Director's Report Susan Domenighini

7. NEXT MEETING - Tuesday, March 16th, 2021 at 6:00PM

8. ADJOURNMENT

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CHARTER COUNCIL
REGULAR MEETING

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Tuesday, January 19th 2021 - 6:00 PM

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AGENDA

OPEN SESSION - 6:00 PM

1. OPENING - 5 Minutes

1.1. Call Meeting to Order

- Monica McDaniel called the meeting to order at 6:04PM.

1.2. Roll Call of Council Members and Establish Quorum

- Present: Trisha Atehortua, Laurel Hill-Ward, Chelsea Parker, Vicki Wonacott, and Monica McDaniel
- Absent: Heather Bonea and Laura Swanson

1.3. Invocation - School Verse Read

"This is our school, May peace dwell here, May the rooms be full of contentment. May love abide here, Love of one another, Love of our school, Love of life itself. Let us remember that as many hands build a house, So many hearts build a school."

- Monica McDaniel read the school verse.
- Monica McDaniel asked for the Charter Council and audience members to take a moment of silence to acknowledge the passing of Caleb Casey, a beloved Blue Oak parent, volunteer, and community member.

1.4. Agenda Modifications

- No agenda modifications were made.

1.5. Meeting Norms

1.5.1. Review Meeting Norms

- Charter Council members reviewed BOCC meeting norms. They reminded the audience that there should be no side conversations happening in the chat bar as this reduces meeting efficiency. Additionally, Council members can only address topics that are listed on the agenda. If a topic is brought up during the meeting that is not listed on the agenda, Council members will not be able to address that item unless it is added to a future agenda. Agenda items may be requested by emailing the Executive Assistant, Alexandra Archer. Audience members are only given three minutes to speak when it is time for public comment and that there should be no discussion between audience members and Council members during the meeting; Council members discussion and public comment should serve as two separate functions.
- Susan was requested to add a process for speaking to the board and handling school complaints. A further detailed, written list of meeting norms and an informal complaint process will be presented at the next meeting.

1.5.2. Uniform Complaint Form

- Additionally, Council members shared with the audience that there is a formal Uniform Complaint Form on the website, both on the Parent Resources page and the BOCC page.

1.5.2.1. Website link

- <https://blueoakcharterschool.org/wp-content/uploads/2019/10/UNIFORM-COMPLAINT-FORM.docx-1.pdf>

1.6. Audience to Address the Council

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- Alicia Trider, a parent of 1st Grader at Blue Oak, who helped to create an Anti-Racism policy with the BOCC during the summer, wanted to thank Council members for their commitment to Blue Oak. Alicia wanted to check in because parts of this Anti-Racism policy called for action items, for example section 9 and 11, and she just wanted to check in about what action items Blue Oak has accomplished. She would like to propose an agenda item be added to monthly BOCC meetings to update the community about this Anti-Racism policy.
- Chelsea Parker apologized for presenting a clip of the CUSD Board Meeting at the last BOCC meeting without giving anyone context about the video content. She understood that was a real trigger point for some people, it was not her intention to catch people off guard, and will be more cautious and thoughtful about actions moving forward.

2. CONSENT AGENDA - 10 Minutes

2.1. Approve Minutes from December 15th, 2020.

2.2. Charter Impact Monthly Report

Jim Weber, Charter Impact

2.2.1. Attendance and Enrollment

2.2.2. Cash Flow

2.2.3. Balance Sheet Detail

2.2.4. Warrants/Aged Payable

2.2.5. Actual to Budget Summary

2.3. Accept Offers of Employment

2.3.1. Darlasia Miller

2.3.2. Lillian Golde

2.4. Accept Donations

- Chelsea Parker made a motion to accept the consent agenda. Vicki Wonacott seconded the motion.

- No further discussion.
- Vote.

Name	Yes	No	Abstain	Absent
Monica McDaniel	X			
Heather Bonea				X
Vicki Wonacott	X			
Laurel Hill-Ward	X			
Laura Swanson				X
Trisha Atehortua	X			
Chelsea Parker	X			

- Vote passes.

3. GOVERNANCE - 15 Minutes

3.1. Charter Council Member Resignation

Heather Bonea

- Heather Bonea who has been a parent and member of the Blue Oak community for around 20 years, and has been an employee and BOCC member during that time, has recently submitted her resignation to the Charter Council. She made a decision for her family which no longer qualifies her to remain a member of the BOCC. Although she was not in attendance, Charter Council members thanked Heather for all her hard work and dedication to Blue Oak. Charter Council members are sad to see her go.
- For those who are interested in applying to fill the vacant Council seat, the Blue Oak Executive Assistant will be sending out more information via ParentSquare.
- Chelsea Parker made a motion to accept Heather's resignation from the Charter Council. Trisha Atehortua seconded the motion.
- No further discussion.
- Vote.

Name	Yes	No	Abstain	Absent
Monica McDaniel	X			
Vicki Wonacott	X			
Laurel Hill-Ward	X			
Laura Swanson				X
Trisha Atehortua	X			
Chelsea Parker	X			

- Vote passes.

3.2. Finance Committee

Chelsea Parker

- The last BOFC meeting was a quick one. Committee members reviewed the financial report submitted by Charter Impact as well as the new budget proposal released from the state. This proposal includes additional COVID funding for schools but there is talk that this funding includes a lot of red tape that may make the total cost to the school greater

than the funds that would be received. Susan is preparing to apply to receive the funds so the school is prepared in the case that we want to move forward with the application.

Susan Domenighini

3.3. Policy Review

3.3.1. Homeless Policy (2nd Reading)

- Charter Council members reviewed the Homeless Policy that was presented at the last BOCC meeting. This is the second reading of this policy and adjustments have been made to include person-first language as suggested during the first reading. It is now ready for review and approval.
- Laurel Hill-Ward made a motion to approve the policy. Chelsea Parker seconded the motion.
- No further discussion.
- Vote.

Name	Yes	No	Abstain	Absent
Monica McDaniel	X			
Vicki Wonacott	X			
Laurel Hill-Ward	X			
Laura Swanson				X
Trisha Atehortua	X			
Chelsea Parker	X			

- Vote passes.

3.4. Marketing Meeting Volunteer

- Last meeting the BOCC approved the budget to consult with a marketing firm, MC2 Designs. Susan now has a meeting set up with the firm to decide on a Blue Oak message which should include voices from all areas of Blue Oak. Susan would love to have a board member join if anyone is interested.
- Monica McDaniel volunteered to attend the meeting.

3.5. School Calendar

- The school calendar presented has been approved by members of faculty and the leadership team. This year, the calendar includes Indigenous Peoples Day as a holiday.
- Chelsea Parker proposed that we list which holidays are being honored on the bottom of the calendar so our community is aware.
- Other Council members requested that teachers take a look at the events and activities that are offered in our community during Indigenous Peoples Day to help inform students and staff about the holiday.
- Alica Trider wanted the BOCC to be mindful of being inclusive of language and suggested using Fall, Winter or Spring Break instead of Thanksgiving, Christmas, or Easter break. Monica McDaniel seconded this idea and asked that this language be used when the holidays are being listed at the bottom of the calendar.
- Trisha Atehortua made a motion to accept the school calendar including a list of the holiday break dates. Monica McDaniel seconded the motion to also use inclusive language when we add the holiday break dates.
- No further discussion.
- Vote.

Name	Yes	No	Abstain	Absent
Monica McDaniel	X			

Vicki Wonacott	X			
Laurel Hill-Ward	X			
Laura Swanson				X
Trisha Atehortua	X			
Chelsea Parker	X			

- Vote passes.
- Laurel Hill-Ward reminded Council members to use a visual when you vote for those who may not be able to hear who is voting.

3.6. School Accountability Report Card

- This document provides information to the community to allow public comparison of schools for student achievement, environment, resources & demographics; it must be posted on our website and forwarded to the CDE for posting every year.
- Chelsea Parker pointed out some incorrect data on page 10. Susan will see if she can correct this mistake since the mistake is a part of the pre-written template Susan used to create this document.
- Alicia Trider used this document to look into our schools curriculum and had a few questions regarding the sources. She was curious if it was possible to have a committee, such as the Anti-Racism taskforce or Parent Council, vet the schools curriculum. Susan Domenighini assured Alicia that there is already a vetting process for the schools curriculum materials and explained that if she had any further questions or would like to review our curriculum she should reach out to the Executive Assistant, Alexandra Archer.
- Trisha Atehortua made a motion to accept the SARC including the edits, if it is possible to make those changes. Chelsea Parker seconded the motion.
- No further discussion.
- Vote.

Name	Yes	No	Abstain	Absent
Monica McDaniel	X			
Vicki Wonacott	X			
Laurel Hill-Ward	X			
Laura Swanson				X
Trisha Atehortua	X			
Chelsea Parker	X			

- Vote passes.

4. FACULTY

4.1. Grade Level Report

Riley Murray & Brianna Lee

- Riley Murray gave a faculty presentation via Powerpoint; this time, giving a more detailed description of the ongoings of one particular classroom. Riley shared what Ms. Sheila and her 3rd grade class has been up to lately, including working on their yearly calendars, appreciating the seasons, learning about time and measurement, reading stories such as Farmer Boy, and sharing poetry written by Ms. Sheila's grandmother.

- Alicia Trider had a question regarding the story Farmer Boy. She pointed out that the book and author is known to be highly racist towards Native Americans. She was concerned about this because, after a survey from the summer, the school recognized that many of our Blue Oak families reported that they identify as Native American. Susan Domenighini explained that the Anti-Racism taskforce and our Pedagogical team are continuously working to ensure that our materials are inclusive. This example, of using the story Farmer Boy, has already been brought to the Pedagogical team for review by Ms. Sheila who asked if she can use this material as an example of why the language used in this story is no longer okay to use.
- Monica McDaniel added that we are starting to see the world through a whole new lens, so she appreciates Alicia's additional input and the hard work of the Pedagogical team.

5. ADMINISTRATION - 30 Minutes

5.1. Executive Director's Report

Susan Domenighini

- Covid Funding
 - Referring to what Chelsea Parker mentioned early during the Finance Committee update, we are still waiting to hear from Mary Sukuma to get some more information about the governor's newest funding proposal.
- Online Concert
 - Our holiday concert over winter break, which included a full hour of live music sung by the Brandi family, raised close to \$1,200. Thank you to Chloe and Her Crew for the wonderful performance.
- Full Day Kinder/Preschool
 - Susan has been meeting with experts in the education field to learn more about starting a Kindergarten and Preschool program at Blue Oak. Additionally, there is a possibility of new funding that could help get these programs started.
- Facility
 - Susan is still in talks with John Roth regarding future real estate options.
- Pedagogical Team
 - The Pedagogical team is continuing work to review our schools curriculum; they are talking a lot about representation in our materials. The team is composed of teachers dear to our hearts: Kari Madera, Sheila Moss, and Cheryl Grant.
- Chico Unified Board
 - Charters leaders are asking CUSD if charter schools can have more time and representation during the CUSD Board meetings. The proposal is that each leader will take turns giving updates during the CUSD Board meetings so we can build a stronger bond with our authorizers.

5.1.1. COVID Response

- In order to keep up with the changing environment and still adhere to COVID regulations, Blue Oak has been trying out a few new ideas. A number of new aides have been hired to help support teachers because, starting on Monday, we will have about 67% of our students onsite who desire to be onsite. This school is still working to bring a few more students on to campus at a later date as well. Susan will be reaching out soon to get a pulse on the distance learning families to see if they are still interested in staying on distance learning for the rest of the year. There will be more information to come.
- There will be two classes that will be split into two rooms in order to accommodate the 6 foot distance while still allowing more students to come on to campus. This is all experimental and will be monitored by Admin regularly. The teacher and aide will go between both rooms to help support all students, and students will still be allowed to mix between the rooms as they are considered one big cohort.
- Blue Oak staff was able to get their first round of Moderna vaccines over the holiday weekend and the second will become available in February.

- There are a number of families who are advocating for our students to be onsite full time. The school is still working to keep a balance for both distance and onsite learners, and also to keep staff and faculty safe as well.
- Trisha Atehortua spoke about the last Parent Council meeting she attended, explaining that there were questions about Blue Oak opening homeschool again. Parents were wondering if this would be an option when Blue Oak chooses to go back full time; thinking, now that many families have had a taste of distance learning, they might be more interested in a homeschooling option now than they have in the past. Susan explained that while we are doing a Hybrid model, homeschooling is not an option but when campus reopens to a full, onsite program that may be a possibility to consider.

6. NEXT MEETING - Tuesday, February 16th 2021 at 6:00PM

ADJOURNMENT

- Monica adjourned the meeting at 7:09PM

Minutes Taken By: Alexandra Archer

Approved by: _____ Date: _____

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SPECIAL MEETING

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Wednesday, January 27th, 2021 - 6:00 PM

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OPEN SESSION - 6:00 PM

1. OPENING - 5 Minutes

1.1. Call Meeting to Order

- Monica McDaniel called the meeting to order at 6:04PM.

1.2. Roll Call of Council Members and Establish Quorum

- Present: Laurel Hill-Ward, Chelsea Parker, Laura Swanson, Trisha Atehortua, Monica McDaniel, Vicki Wonacott (arrived late)
- Absent: None

1.3. Invocation - School Verse Read

"This is our school, May peace dwell here, May the rooms be full of contentment. May love abide here, Love of one another, Love of our school, Love of life itself. Let us remember that as many hands build a house, So many hearts build a school."

- Brianna Lee read the school verse.

1.4. Agenda Modifications

- There were no agenda modifications made.

2. GOVERNANCE - 15 Minutes

2.1. Extension of Unused Families First Coronavirus Response Act (FFCRA) Leave. *These benefits expired on December 31, 2021 but can be extended through March 31, 2021*

- When schools shut down at the beginning of the pandemic, Families First Coronavirus Response Act was established which is an extension of leave for COVID reasons. Since we are still dealing with the coronavirus, Susan proposed that the BOCC accept the extension which would provide the FFCRA leave for Blue Oak employees until March 31st. Susan called a special meeting for this to ensure Blue Oak employees had this available to them as soon as possible in case they need to use it.
- Chelsea Parker explained that this is a federal program and the expectation is that it is only extended until March to give the new US President time to establish a new plan to either continue to extend this act or replace it with a new one. Since a new act is not available yet, they called for an extension so there is no gap in these benefits. There should hopefully be new information available to us soon in the next few months.
- Laurel Hill-Ward moves to accept the extension. Chelsea Parker seconded the motion.
- No further discussion.
- Vote

Name	Yes	No	Abstain	Absent
Monica McDaniel	X			
Vicki Wonacott				X
Laurel Hill-Ward	X			
Laura Swanson	X			
Trisha Atehortua	X			
Chelsea Parker	X			

- Vote passes.
- BOCC members are thankful Susan brought this up so our staff members are covered.

2.2. COVID-19 Safety Plan Updates *New updates to safety plan expectations and definitions from the state will be reviewed.*

- The governor released some new COVID-related safety updates last week that includes some slight changes for school safety as well as some new language. As it stands, our safety plan already covers his requirements, which is great news. However, there are a few additions and changes the BOCC needs to review. Susan wanted to make sure the language was out there and to have an understanding of how fast things are changing so we can do our best to keep up with it.
- Vicki Wonacott joined the meeting.
- This checklist was developed for schools who are not open so some of the language does not apply to us because we are already open. Some of the changes that this document highlights are: language change from cohorts to stable group structures; establishing the minimum and maximum number in a stable group; for physical distancing students desks, the maximum is 6ft and the minimum is 4ft; and our school needs to offer weekly student testing but it is up to the parents whether the student is actually allowed to test weekly.
- In regards to offering the students tests, the legislature is still working on the funding to provide these tests but this document is due now regardless of that piece. There is currently a provider through BCOE that Blue Oak could use for students, or there could be self-testing kits distributed to each school; we aren't sure which option we would have available to us because we need the funding first. Additionally, if Blue Oak offers testing,

parents would have to sign a form saying their information would have to be shared with the school.

- If we implement our students desks 4ft apart, yes, the dual classrooms could be together again. This may be a possibility after we see how our initial idea works out.
- Passing this document will override our current maximum number of students in a “cohort” outlined in our schools safety plan. If it passes, Susan will make those adjustments.
- An error in the minimum number of students in a stable group was pointed out, Susan will make the change to have the minimum number of stable groups to 2, the lowest number possible.
- Finally, the state has issued a warning that distance learning may have to continue through the year and possibly into next year
- Chelsea Parker made a motion to approve the recommendations included in the checklist, with the change to the minimum stable group structure size to 2. Laurel Hill-Ward seconded the motion.
- No further discussion.
- Vote.

Name	Yes	No	Abstain	Absent
Monica McDaniel	X			
Vicki Wonacott	X			
Laurel Hill-Ward	X			
Laura Swanson	X			
Trisha Atehortua	X			
Chelsea Parker	X			

- Vote
- Susan warned Council members that after comments from her meetings with YMC and Chico charter leaders, schools are expecting a lot of action from the legislature which means the BOCC may have to move quickly with another special meeting as well to adjust to the changes.
- Finally, Monica McDaniel pointed out that she may not be available on the 16th and our vice chair resigned during the last regular meeting so the BOCC will need to establish a new vice chair. Chelsea Parker requested that we include this item on the next agenda.

3. NEXT MEETING - Tuesday, February 16th, 2021 at 6:00PM

- Monica McDaniel adjourned the meeting at 6:38PM.

ADJOURNMENT

Minutes Taken By: Alexandra Archer

Approved by: _____ Date: _____

Blue Oak Charter School

Monthly Financial Presentation – January 2021

January Highlights

Highlights

- Forecast surplus **+\$687K**, includes PPP forgiveness, recommended to reserve surplus for future shortfalls.
- Revenue forecast exceeds budget, **+\$474K**. Excluding CARES Act and PPP timing **+\$25K**.
- Expenses forecast below budget **\$115K**.
- Cash ended month **\$546K**.
- State payment deferrals and ongoing economic uncertainty influence 2020/21 planning.

Compliance and Reporting

- 2nd Interim report will be prepared following January close (due March 15th).
- Consolidated Application for federal funding due Feb 28th.

Enrollment and Revenues

- 2020/21 funding is based on 2019/20 P-2 ADA (293.37), no ADA will be reported for 2020/21.
- 2020/21 CALPADS data will update rolling UPP for 2020/21, current forecast 58% (3 yr).

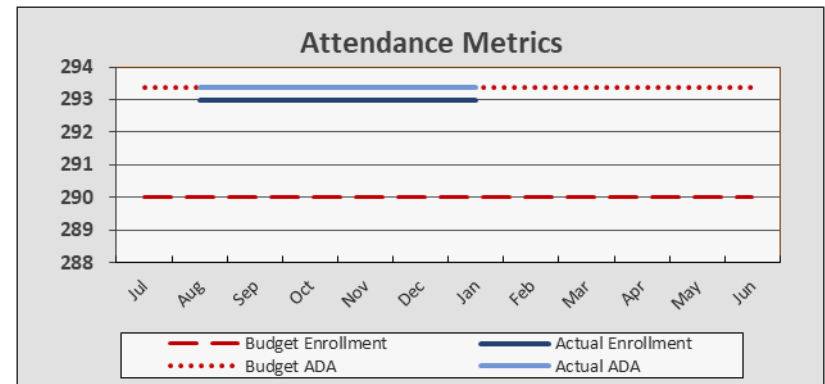
Attendance Data and Metrics



Enrollment and Per Pupil Data

Enrollment & Per Pupil Data			
	<u>Actual</u>	<u>Forecast</u>	<u>Budget</u>
Average Enrollment	293	293	290
ADA	293	293	293
Attendance Rate	100.1%	100.1%	101.2%
Unduplicated %		58.0%	58.0%
Revenue per ADA		\$14,186	\$12,570
Expenses per ADA		\$11,843	\$12,237

Attendance Metrics



2020/21 funding is based on 2019/20 P-2 ADA (293.37), no ADA will be reported for 2020/21.

Revenue

- **January Updates**
 - **Forecast PPP loan forgiveness \$529,920.**
 - **Learning Loss Mitigation and ESSER Funds:**
 - **\$153K** use by Dec 2020 (completed)
 - **\$23K** use by June 2021
 - **\$80K** removed from forecast until 2021/22 to maintain/expand current services.

Revenue

Year-to-Date		
Actual	Budget	Fav/(Unf)
\$ 1,300,660	\$ 1,271,376	\$ 29,284
209,848	251,277	(41,429)
23,604	198,672	(175,068)
112,947	122,309	(9,362)
<u>\$ 1,647,059</u>	<u>\$ 1,843,634</u>	<u>\$ (196,575)</u>

<i>Annual/Full Year</i>		
Forecast	Budget	Fav/(Unf)
\$ 2,678,787	\$ 2,678,690	\$ 97
817,792	372,705	445,087
441,115	414,765	26,350
224,143	221,543	2,600
\$ 4,161,836	\$ 3,687,703	\$ 474,133



Expenses

- January Updates
 - Expenses update** – Current trend favorable to budget **+\$116K**. Trend may revert with program changes.
 - 2021/22 planning** – Despite improved LCFF funding and \$80K federal, current budget at (\$100K) deficit. Proposed federal funding likely to solve current deficit, but long-term concerns at 290 enrollment.

	Year-to-Date			Annual/Full Year		
	Actual	Budget	Fav/(Unf)	Forecast	Budget	Fav/(Unf)
Expenses						
Certificated Salaries	\$ 880,366	\$ 967,760	\$ 87,394	\$ 1,324,236	\$ 1,428,037	\$ 103,801
Classified Salaries	171,341	218,601	47,260	351,866	399,225	47,359
Benefits	279,938	312,044	32,106	470,957	499,280	28,323
Books and Supplies	163,902	174,125	10,223	194,902	198,500	3,598
Subagreement Services	66,609	70,702	4,093	131,891	129,620	(2,271)
Operations	81,775	78,215	(3,560)	149,265	134,421	(14,843)
Facilities	351,427	356,652	5,226	609,858	611,404	1,545
Professional Services	117,304	95,927	(21,376)	221,980	169,988	(51,993)
Depreciation	11,332	11,332	0	19,426	19,426	0
Interest	3,135	-	(3,135)	-	-	-
Total Expenses	\$ 2,127,128	\$ 2,285,358	\$ 158,230	\$ 3,474,382	\$ 3,589,901	\$ 115,519

Surplus / (Deficit) & Fund Balance

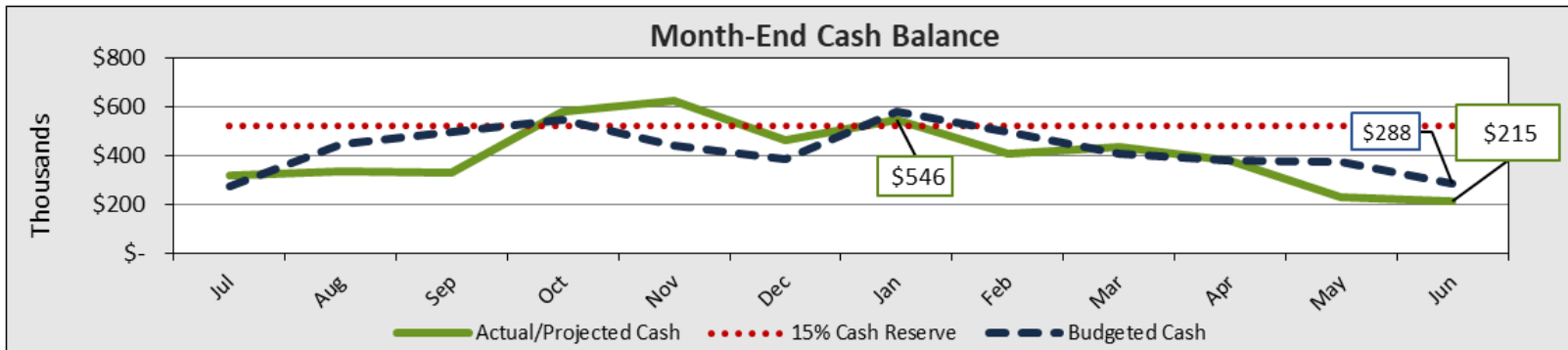
- Current forecast surplus **+\$687K**.
- Additional **\$80K** surplus **excluded** (LLMF and ESSER) eligible for use during 2021/22.
- Fund balance forecast **\$1.2 million**, 35%, 128 days expenses.
- Deferred funding reduces fund balance available as cash reserves.

	Year-to-Date		
	Actual	Budget	Fav/(Unf)
Total Surplus(Deficit)	\$ (480,070)	\$ (441,725)	\$ (38,345)
Beginning Fund Balance	<u>531,329</u>	<u>531,329</u>	
Ending Fund Balance	<u><u>\$ 51,259</u></u>	<u><u>\$ 89,604</u></u>	
<i>As a % of Annual Expenses</i>	<i>1.5%</i>	<i>2.5%</i>	

	Annual/Full Year		
	Forecast	Budget	Fav/(Unf)
	\$ 687,454	\$ 97,802	\$ 589,652
	<u>531,329</u>	<u>531,329</u>	
	<u><u>\$ 1,218,783</u></u>	<u><u>\$ 629,131</u></u>	
	<i>35.1%</i>	<i>17.5%</i>	

Cash Balance

- Current cash is \$546K.
- State payment deferrals and ongoing economic uncertainty influence 2020/21 planning.
- **Advance cash planning forecast to avoid short-term borrowing during June-Aug 2021.**
- Management and Charter Impact are monitoring activities to ensure adequate cash availability.



Compliance Deadlines (next 60 days)



Area	Due Date	Description	Completed By	Board Must Approve	Signature Required	Additional Information
DATA	Feb-01	School Accountability Report Card - All public schools in California are required to prepare an annual SARC (2019/20). SARCs are intended to provide the public with important information about each public school and to communicate a school's progress in achieving its goals. EC Section 35256 requires LEA governing boards to approve SARCs for publications.	BOCS	Yes	No	http://www.cde.ca.gov/ta/ac/sa/
FINANCE	Feb-15	Board of Equalization Property Tax Exemption - Property used exclusively for public schools, community colleges, state colleges, and state universities is exempt from property taxation (article XIII, section 3, subd. (d), Revenue and Taxation Code section 202, subd. (a)(3)). The property is exempt from taxation on the basis of its exclusive use for public school purposes. If the property is not owned by the public school, the owner of the property is required to file a claim for the Lessor's Exemption. If the owner of the property does not claim the exemption, the public school may file the Public School Exemption claim.	Charter Impact	No	Yes	https://www.boe.ca.gov/proptaxes/lessor_exemption.htm
FINANCE	Feb-20	Certification of the First Principal Apportionment - The Principal Apportionment includes funding for the Local Control Funding Formula, the primary source of an LEA's general purpose funding; Special Education (AB 602); and funding for several other programs. The First Principal Apportionment (P-1), certified by February 20, is based on the first period data that LEAs report to CDE in November through January. P-1 supersedes the Advance Apportionment calculations and establishes each LEA's monthly state aid payment for February through May.	Charter Impact	No	Yes	https://www.cde.ca.gov/fg/aa/pa/
FINANCE	Feb-24	E-Rate FCC Form 470 Due date (FY2021) - To request bids for service, applicants certify an FCC Form 470 in the E-rate Productivity Center (EPC). This is a formal process to identify and request the products and services you need so that potential service providers can review your requests and submit bids. The FCC Form 470 must be certified in EPC at least 28 days before the close of the filing window. February 24, 2021 is the deadline to certify an FY2021 FCC Form 470 and still be able to certify an FCC Form 471 within the FY2021 filing window.	BOCS	No	No	https://www.usac.org/si/tools/forms/
FINANCE	Feb-28	Consolidated Application (ConApp) reporting - Winter - The ConApp is used by the CDE to distribute categorical funds from various state and federal programs to county offices, school districts, and direct-funded charter schools throughout California. The winter release is submitted in January of each year and contains the LEA's entitlements for each funded program.	Charter Impact	No	No	https://www.cde.ca.gov/fg/aa/co/cars.asp
FINANCE	Mar-01	Every Student Succeeds Act Per-Pupil Expenditure Application - The Elementary and Secondary Education Act of 1965 (ESEA), as reauthorized by the Every Student Succeeds Act (ESSA), requires state educational agencies (SEAs) and their local educational agencies (LEAs) to prepare and publish annual report cards that contain specified data elements, including LEA and school-level per-pupil expenditures (PPE).	Charter Impact	No	No	https://www3.cde.ca.gov/essars
DATA	Mar-05	CALPADS - Fall 2 deadline - Please be mindful that Level-2 certification within CALPADS means that these data have been reviewed and approved by your superintendent or IRC administrator. Failure to properly review and amend these data in CALPADS within the allotted amendment window will result in the improper certification of official Fall 2 data within CALPADS, which can impact a number of things, including LCFF funding, student course enrollments, staff assignments and English learner education services.	Charter Impact submits with data provided by BOCS	No	No	https://www.cde.ca.gov/ds/sp/cl/rptcalendar.asp
FINANCE	Mar-15	2nd Interim Financial Report - Local educational agencies (LEAs) are required to file two reports during a fiscal year (interim reports) on the status of the LEA's financial health. The first interim report is due December 15 for the period ending October 31. The second is due March 15 for the period ending January 31.	Charter Impact	Yes	Yes	https://www.cde.ca.gov/fg/sf/fr/calendar19district.asp
FINANCE	Mar-19	El Dorado SELPA Pre-Test for Year-End Maintenance of Effort (Special Education) - Report due to Charter school's SELPA. Maintenance of Effort (MOE) is a requirement that you spend each year at least what you spent last year in the area of special education (with some exceptions). If you reduce your special education budget (or expenditures) in a given year, you need to be careful to ensure that you have met the MOE requirement. This does not mean you can't reduce costs, but you must do so within the guidelines of federal MOE.	Charter Impact	No	No	http://charterselpa.org/fiscal/
FINANCE	Mar-25	E-Rate FCC Form 471 Due date (FY2021) - To apply for program discounts, applicants file an FCC Form 471 in EPC to provide USAC with information about the services they are requesting and the discount(s) for which they are eligible. The FCC Form 471 must be certified by March 25, 2021.	BOCS	No	No	https://www.usac.org/si/tools/forms/

Appendices

As of January 31, 2021

- Cash Flow – Monthly and Annual Forecast
- Statement of Financial Position (Balance Sheet)
- Statement of Cash Flows
- Detailed Month and YTD Budget vs. Actual
- Accounts Payable Aging
- Check Register

Blue Oak Charter School

Financial Package
January 31, 2021

Presented by:



Blue Oak Charter School

Monthly Cash Flow/Forecast FY20-21

Revised 02/05/2021

ADA = 293.37



Revenues

State Aid - Revenue Limit

8011	LCFF State Aid	-	69,481	69,481	125,066	128,236	121,896	125,066	125,066	58,848	22,538	22,538	22,538	499,585
8012	Education Protection Account	-	-	-	138,207	-	-	138,207	-	-	138,206	-	-	138,207
8019	State Aid - Prior Year	-	-	-	11,477	-	-	-	-	(2,295)	(2,295)	(2,295)	(2,295)	(2,295)
8096	In Lieu of Property Taxes	-	44,825	89,650	59,767	59,767	59,767	59,767	59,767	100,771	50,385	50,385	50,385	50,385

Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Year-End Accruals
-	114,306	159,131	334,517	188,003	181,663	323,040	184,833	157,324	208,834	70,628	70,628	685,881

Annual Forecast
1,390,338
552,827
-
735,622
2,678,787

Revised Budget	Favorable / (Unfav.)
ADA = 293.37	
1,699,234	(308,895)
243,834	308,992
-	-
735,622	-
2,678,690	97

Federal Revenue

8181	Special Education - Entitlement	-	-	-	-	-	-	-	19,938	-	-	4,984	14,953
8290	Title I, Part A - Basic Low Income	-	-	-	-	18,794	32,957	-	-	18,688	-	-	4,312
8291	Title II, Part A - Teacher Quality	-	-	-	-	2,433	-	4,212	-	-	2,521	-	917
8296	Other Federal Revenue	-	-	-	37,287	55,930	62,447	-	-	-	-	529,920	7,500

-	-	-	37,287	55,930	83,674	32,957	4,212	19,938	18,688	2,521	534,904	27,682
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39,875
74,750
10,083
693,084
817,792

39,875	-
77,683	(2,933)
11,449	(1,366)
243,698	449,386
372,705	445,087

Other State Revenue

8545	School Facilities (SB740)
8550	Mandated Cost
8560	State Lottery
8598	Prior Year Revenue
8599	Other State Revenue

-	-	-	-	-	4,946	18,658	-	177,103	14,595	15,035	22,823	187,955
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319,744
4,946
58,381
2,217
55,827
441,115

312,615	7,129
4,946	(0)
58,381	-
-	2,217
38,823	17,004
414,765	26,350

Other Local Revenue

8689	Other Fees and Contracts	-	1,500	-	600	-	500	-	-	-	-	-	-
8699	School Fundraising	20	6,580	2,207	660	1,507	2,590	654	7,946	7,946	7,946	7,946	-
8792	Transfers of Apportionments	7,818	15,791	15,799	9,324	15,799	15,799	15,799	7,465	2,859	2,859	2,859	-

7,838	23,871	18,006	10,584	17,306	18,389	16,953	15,410	10,804	10,804	10,804	-	63,372
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2,600
46,000
175,543
224,143

-	2,600
46,000	-
175,543	-
221,543	2,600

Total Revenue

Expenses

Certificated Salaries

1100	Teachers' Salaries	91,139	106,143	108,402	110,925	111,348	108,386	111,830	106,397	106,397	106,397	15,852	-
1170	Teachers' Substitute Hours	-	-	-	-	600	(240)	-	3,192	3,192	3,192	3,192	1,596
1175	Teachers' Extra Duty/Stipends	699	736	1,506	1,140	840	840	840	1,733	1,733	1,733	-	-
1200	Pupil Support Salaries	-	583	7,574	6,457	5,243	2,442	3,603	4,070	4,070	4,070	4,070	2,035
1300	Administrators' Salaries	14,086	14,294	14,190	14,190	14,190	14,190	14,190	14,190	14,190	14,190	14,190	-

105,924	121,755	131,672	132,712	132,222	125,618	130,463	129,582	129,582	129,582	37,304	17,821	-
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1,083,217
14,724
11,800
44,217
170,279
1,324,236

1,164,716	81,499
34,941	20,218
11,800	-
40,700	(3,517)
175,879	5,600
1,428,037	103,801

Classified Salaries

2100	Instructional Salaries	229	221	14,186	10,356	8,204	6,764	9,050	12,591	12,591	12,591	12,591	6,295
2400	Clerical and Office Staff Salaries	6,264	11,854	8,861	12,544	10,990	7,430	8,530	12,669	12,669	12,669	12,669	-
2900	Other Classified Salaries	2,518	1,516	13,576	11,105	10,349	8,084	8,713	12,105	12,105	12,105	12,105	-

9,011	13,591	36,623	34,004	29,542	22,278	26,292	37,364	37,364	37,364	37,364	31,069	-
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105,667
129,816
116,383
351,866

125,907	20,240
147,445	17,629
125,873	9,490
399,225	47,359

Benefits

3101	STRS	16,034	18,530	19,824	19,554	19,358	17,076	19,129	20,839	20,839	20,839	5,999	2,866
3202	PERS	4,155	3,393	9,480	9,214	9,069	6,453	7,381	8,771	8,771	8,771	8,771	7,293
3301	OASDI	848	735	2,872	2,721	2,496	1,809	2,103	2,627	2,627	2,627	2,627	2,184
3311	Medicare	1,544	1,831	2,377	2,312	2,238	2,047	2,121	2,481	2,481	2,481	1,110	726
3401	Health and Welfare	12,044	3,695	10,107	7,425	8,416	12,720	10,737	9,525	9,525	9,525	9,525	-
3501	State Unemployment	53	63	82	80	(566)	70	73	420	210	105	105	105
3601	Workers' Compensation	953	953	953	953	953	2,091	953	1,711	1,711	1,711	765	501
3901	Other Benefits	51	64	67	56	61	61	64	64	64	64	64	-

35,683	29,263	45,762	42,315	42,025	42,327	42,562	46,438	46,228	46,123	28,966	23,265	-
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200,888
91,520
26,277
23,748
112,769
801
14,209
745
470,957

230,628	29,740
82,640	(8,881)
24,752	(1,525)
26,495	2,748
114,300	1,531
2,193	1,392
18,273	4,064
-	(745)
499,280	28,323

Books and Supplies

4100	Textbooks and Core Materials	-	3,490	4,674	12,540	-	-	-	-	-	-	-	-
4200	Books and Reference Materials	-	4,198	1,002	(4,707)	-	-	34	295	295	295	295	-
4302	School Supplies	-	14,883	2,535	2,679	2,976	(80)	936	2,414	2,414	2,414	2,414	-
4305	Software	129	129	9,954	(768)	774	3,133	786	272	272	272	272	-
4310	Office Expense	-	3,768	4,507	2,805	1,735	494	2,885	761	761	761	761	-
4312	School Fundraising Expense	-	-	-	-	-	-	-	500	500	500	500	-
4400	Noncapitalized Equipment	-	-	17,770	44,752	3,149	19,885	2,855	1,958	1,958	1,958	1,958	-

129	26,468	40,442	57,301	8,634	23,432	7,496	6,200	6,200	6,200	6,200	6,200	-
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20,704
2,000
36,000
15,495
20,000
2,500
98,203
194,902

16,000	(4,704)
6,000	4,000
46,000	10,000
-	(15,495)
10,000	(10,000)
2,500	-
118,000	19,797
198,500	3,598

Blue Oak Charter School

Monthly Cash Flow/Forecast FY20-21

Revised 02/05/2021

ADA = 293.37



Subagreement Services

5101	Nursing
5102	Special Education
5105	Security

Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Year-End Accruals
-	-	3,958	1,979	-	1,979	3,958	1,979	1,979	1,979	1,979	1,979	-
-	150	4,530	14,437	13,717	12,762	8,284	10,949	10,949	10,949	10,949	10,949	-
-	-	428	-	-	428	-	129	129	129	129	129	-
-	150	8,915	16,416	13,717	15,169	12,242	13,056	13,056	13,056	13,056	13,056	-

21,766 - (21,766)

108,625 128,120 19,495

1,500 1,500 -

131,891 129,620 (2,271)

Operations and Housekeeping

5201	Auto and Travel
5300	Dues & Memberships
5400	Insurance
5501	Utilities
5502	Janitorial Services
5900	Communications
5901	Postage and Shipping

-	-	-	-	-	-	-	600	600	600	600	600	-
-	-	50	885	-	2,950	-	-	-	-	-	-	-
2,175	922	5,541	3,643	3,643	3,553	3,554	3,922	3,922	3,922	3,922	3,922	-
5,081	5,387	8,318	4,775	4,913	3,136	4,490	6,780	6,780	6,780	6,780	6,780	-
-	-	1,846	-	-	2,797	923	1,087	1,087	1,087	1,087	1,087	-
652	742	563	240	1,112	7,910	463	1,109	1,109	1,109	1,109	1,109	-
-	533	433	193	18	78	258	-	-	-	-	-	-
7,908	7,584	16,750	9,735	9,685	20,424	9,688	13,498	13,498	13,498	13,498	13,498	-

3,000 3,000 -

3,885 1,000 (2,885)

42,640 38,421 (4,219)

70,000 70,000 -

11,000 11,000 -

17,227 10,000 (7,227)

1,513 1,000 (513)

149,265 134,421 (14,843)

Facilities, Repairs and Other Leases

5601	Rent
5603	Equipment Leases
5610	Repairs and Maintenance

48,867	48,867	48,867	48,867	48,867	48,867	48,867	48,867	48,867	48,867	48,867	48,867	-
1,395	1,524	962	786	1,376	896	1,666	1,450	1,450	1,450	1,450	1,450	-
-	120	50	240	-	268	76	1,369	1,369	1,369	1,369	1,369	-
50,262	50,511	49,879	49,893	50,243	50,030	50,609	51,686	51,686	51,686	51,686	51,686	-

586,404 586,404 -

15,855 17,400 1,545

7,600 7,600 -

609,858 611,404 1,545

Professional/Consulting Services

5801	IT
5802	Audit & Taxes
5803	Legal
5804	Professional Development
5805	General Consulting
5806	Special Activities/Field Trips
5809	Other taxes and fees
5810	Payroll Service Fee
5811	Management Fee
5812	District Oversight Fee
5815	Public Relations/Recruitment

-	-	427	7,037	2,736	3,044	9,213	2,373	2,373	2,373	2,373	2,373	-
-	-	2,730	6,405	-	1,838	1,575	-	-	-	-	-	-
-	-	416	296	624	-	-	1,233	1,233	1,233	1,233	1,233	-
-	5,487	678	945	(75)	350	280	-	-	-	-	-	-
-	375	5,087	1,696	2,071	1,696	1,696	1,846	1,846	1,846	1,846	1,846	-
-	-	-	-	(640)	(300)	-	2,188	2,188	2,188	2,188	2,188	-
1	449	1,221	987	917	818	1,052	946	946	946	946	946	-
150	555	578	718	439	675	579	241	241	241	241	241	-
5,579	5,862	5,862	5,862	6,317	6,317	6,317	8,224	8,224	8,224	8,224	8,224	-
-	695	695	2,633	-	2,502	2,633	1,848	1,573	2,088	706	706	10,707
-	750	-	-	255	-	200	359	359	359	359	359	-
5,730	14,173	17,694	26,579	12,643	16,939	23,545	19,258	18,983	19,498	18,116	18,116	10,707

34,320 12,200 (22,120)

12,548 3,500 (9,048)

7,500 7,500 -

7,665 5,000 (2,665)

21,847 20,347 (1,500)

10,000 10,000 -

10,176 3,000 (7,176)

4,900 4,900 -

83,237 73,754 (9,483)

26,788 26,787 (1)

3,000 3,000 -

221,980 169,988 (51,993)

Depreciation

6900	Depreciation Expense
------	----------------------

1,619	1,619	1,619	1,619	1,619	1,619	1,619	1,619	1,619	1,619	1,619	1,619	-
1,619	1,619	1,619	1,619	1,619	1,619	1,619	1,619	1,619	1,619	1,619	1,619	-

19,426 19,426 0

19,426 19,426 0

Interest

7438	Interest Expense
------	------------------

451	451	437	292	598	453	453	-	-	-	-	(3,135)	-
451	451	437	292	598	453	453	-	-	-	-	(3,135)	-

- - -

- - -

Total Expenses

216,717	265,565	349,794	370,866	300,929	318,289	304,969	318,701	318,216	318,626	207,809	173,195	10,707
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3,474,382 3,589,901 115,519

Monthly Surplus (Deficit)

(208,879)	(127,388)	(172,656)	11,522	(39,690)	(29,616)	86,639	(114,246)	46,952	(65,705)	(108,821)	455,160	954,183
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687,454 97,802 589,652

Cash Flow Adjustments

Monthly Surplus (Deficit)
Cash flows from operating activities
Depreciation/Amortization
Public Funding Receivables
Grants and Contributions Rec.
Prepaid Expenses
Accounts Payable
Accrued Expenses
Summer Holdback
Deferred Revenues
Cash flows from investing activities
Cash flows from financing activities
Proceeds(Payments) on Debt

(208,879)	(127,388)	(172,656)	11,522	(39,690)	(29,616)	86,639	(114,246)	46,952	(65,705)	(108,821)	455,160	954,183
1,619	1,619	1,619	1,619	1,619	1,619	1,619	1,619	1,619	1,619	1,619	1,619	-
9,140	88,186	152,479	94,809	45,000	15,450	(6,505)	135,299	-	-	-	55,879	(964,891)
9,909	12,248	3,957	-	-	-	-	-	-	-	-	-	-
3,279	7,801	(38,576)	1,779	19,131	(17,471)	5,165	4,163	4,163	4,163	4,163	4,163	-
(21,726)	-	-	-	33,116	(33,116)	1	-	-	-	-	-	10,707
16,998	31,219	40,953	(21,936)	35,371	(45,413)	(12,471)	(172,065)	(31,509)	-	(19,281)	47,040	-
-	5,492	5,204	5,774	5,774	5,774	5,186	5,774	5,774	5,774	(25,262)	(25,262)	-
-	-	-	154,694	(55,930)	(59,947)	4,140	-	-	-	-	(22,823)	-
451	451	437	292	598	453	453	-	-	-	-	(533,055)	-

19,426 19,426 0

(375,154) 26,115 1,924

(11,018) (131,093) -

- 20,134

(529,920)

Total Change in Cash

(189,209)	19,628	(6,583)	248,552	44,989	(162,267)	84,226	(139,456)	27,000	(54,149)	(147,582)	(17,279)
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Cash, Beginning of Month

506,855	317,646	337,274	330,691	579,243	624,232	461,964	546,190	406,734	433,734	379,584	232,002
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Cash, End of Month

317,646	337,274	330,691	579,243	624,232	461,964	546,190	406,734	433,734	379,584	232,002	214,724
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Blue Oak Charter School
Statement of Financial Position

January 31, 2021

	Current Balance	Beginning Year Balance	YTD Change	YTD % Change
Assets				
Current Assets				
Cash & Cash Equivalents	\$ 546,190	\$ 506,855	\$ 39,335	8%
Accounts Receivable	11,651	37,766	(26,115)	-69%
Public Funding Receivables	229,338	627,898	(398,560)	-63%
Prepaid Expenses	89,213	70,320	18,893	27%
Total Current Assets	876,392	1,242,838	(366,446)	-29%
Long-Term Assets				
Property & Equipment, Net	29,140	40,472	(11,332)	-28%
Deposits	28,000	28,000	-	0%
Total Long Term Assets	57,140	68,472	(11,332)	-17%
Total Assets	\$ 933,532	\$ 1,311,310	\$ (377,778)	-29%
Liabilities				
Current Liabilities				
Accounts Payable	\$ 1	\$ 21,726	\$ (21,725)	-100%
Accrued Liabilities	305,244	227,320	77,924	34%
Deferred Revenue	42,957	-	42,957	0%
Notes Payable, Current Portion	235,711	235,711	-	0%
Total Current Liabilities	583,913	484,757	99,156	20%
Long-Term Liabilities				
Notes Payable, Net of Current Portion	298,361	295,225	3,135	1%
Total Long-Term Liabilities	298,361	295,225	3,135	1%
Total Liabilities	882,274	779,983	102,292	13%
Total Net Assets	51,258	531,327	(480,070)	-90%
Total Liabilities and Net Assets	\$ 933,532	\$ 1,311,310	\$ (377,778)	-29%

Blue Oak Charter School

Statement of Cash Flows

For the period ended January 31, 2021

	Month Ended 01/31/20	YTD Ended 01/31/20
Cash Flows from Operating Activities		
Change in Net Assets	\$ 86,639	\$ (480,070)
Adjustments to reconcile change in net assets to net cash flows from operating activities:		
Depreciation	1,619	11,332
Decrease/(Increase) in Operating Assets:		
Public Funding Receivables	(6,505)	398,560
Grants, Contributions & Pledges Receivable	-	26,115
Prepaid Expenses	5,165	(18,893)
(Decrease)/Increase in Operating Liabilities:		
Accounts Payable	1	(21,725)
Accrued Expenses	(7,286)	77,924
Deferred Revenue	4,140	42,957
Total Cash Flows from Operating Activities	83,773	36,200
Cash Flows from Financing Activities		
Proceeds from (payments on) Long-Term Debt	453	3,135
Total Cash Flows from Financing Activities	453	3,135
Change in Cash & Cash Equivalents	84,226	39,335
Cash & Cash Equivalents, Beginning of Period	461,964	506,855
Cash and Cash Equivalents, End of Period	\$ 546,190	\$ 546,190

Blue Oak Charter School

Statement of Activities

For the period ended January 31, 2021

	Current Period Actual	Current Period Budget	Current Period Variance	Current Year Actual	YTD Budget	YTD Budget Variance	Total Budget
Revenues							
State Aid - Revenue Limit							
LCFF State Aid	\$ 125,066	\$ 152,931	\$ (27,865)	\$ 639,226	\$ 781,648	\$ (142,422)	\$ 1,699,234
Education Protection Account	138,207	60,959	77,248	276,414	121,917	154,497	243,834
State Aid - Prior Year	-	-	-	11,477	-	11,477	-
In Lieu of Property Taxes	59,767	58,850	917	373,543	367,811	5,732	735,622
Total State Aid - Revenue Limit	323,040	272,739	50,301	1,300,660	1,271,376	29,284	2,678,690
Federal Revenue							
Special Education - Entitlement	-	-	-	-	-	-	39,875
Title I, Part A - Basic Low Income	32,957	19,421	13,536	51,751	38,842	12,910	77,683
Title II, Part A - Teacher Quality	-	2,862	(2,862)	2,433	5,725	(3,292)	11,449
Other Federal Revenue	-	18,494	(18,494)	155,664	206,711	(51,047)	243,698
Total Federal Revenue	32,957	40,777	(7,820)	209,848	251,277	(41,429)	372,705
Other State Revenue							
School Facilities (SB740)	-	156,308	(156,308)	-	156,308	(156,308)	312,615
Mandated Cost	-	-	-	4,946	4,946	(0)	4,946
State Lottery	16,441	14,595	1,845	16,441	14,595	1,845	58,381
Prior Year Revenue	2,217	-	2,217	2,217	-	2,217	-
Other State Revenue	-	-	-	-	22,823	(22,823)	38,823
Total Other State Revenue	18,658	170,903	(152,245)	23,604	198,672	(175,068)	414,765
Other Local Revenue							
Other Fees and Contracts	500	-	500	2,600	-	2,600	-
School Fundraising	654	5,060	(4,406)	14,218	25,760	(11,542)	46,000
Transfers of Apportionments	15,799	15,799	0	96,129	96,549	(420)	175,543
Total Other Local Revenue	16,953	20,859	(3,906)	112,947	122,309	(9,362)	221,543
Total Revenues	391,607	505,277	(113,670)	1,647,059	1,843,634	(196,575)	3,687,703
Expenses							
Certificated Salaries							
Teachers' Salaries	111,830	116,472	4,641	748,174	815,301	67,127	1,164,716
Teachers' Substitute Hours	-	3,494	3,494	360	19,218	18,858	34,941
Teachers' Extra Duty/Stipends	840	1,180	340	6,601	8,260	1,659	11,800
Pupil Support Salaries	3,603	4,070	467	25,902	22,385	(3,517)	40,700
Administrators' Salaries	14,190	14,657	467	99,329	102,596	3,267	175,879
Total Certificated Salaries	130,463	139,872	9,409	880,366	967,760	87,394	1,428,037
Classified Salaries							
Instructional Salaries	9,050	12,591	3,541	49,008	69,249	20,240	125,907
Clerical and Office Staff Salaries	8,530	12,669	4,139	66,472	84,101	17,629	147,445
Other Classified Salaries	8,713	12,124	3,412	55,860	65,251	9,391	125,873
Total Classified Salaries	26,292	37,384	11,092	171,341	218,601	47,260	399,225
Benefits							
State Teachers' Retirement System, certificated	19,129	22,589	3,461	129,505	156,293	26,788	230,628
Public Employees' Retirement System, classified	7,381	7,738	357	49,145	45,250	(3,895)	82,640
OASDI/Medicare/Alternative, certificated	2,103	2,318	214	13,585	13,553	(31)	24,752
Medicare/Alternative, certificated	2,121	2,570	449	14,469	17,202	2,733	26,495
Health and Welfare Benefits, certificated	10,737	9,525	(1,212)	65,144	66,675	1,531	114,300
State Unemployment Insurance, certificated	73	548	475	(144)	1,206	1,350	2,193
Workers' Compensation Insurance, certificated	953	1,773	819	7,810	11,864	4,053	18,273
Other Benefits, certificated positions	64	-	(64)	424	-	(424)	-
Total Benefits	42,562	47,062	4,500	279,938	312,044	32,106	499,280

Blue Oak Charter School

Statement of Activities

For the period ended January 31, 2021

	Current Period Actual	Current Period Budget	Current Period Variance	Current Year Actual	YTD Budget	YTD Budget Variance	Total Budget
Books & Supplies							
Textbooks and Core Materials	-	-	-	20,704	16,000	(4,704)	16,000
Books and Reference Materials	34	-	(34)	527	6,000	5,473	6,000
School Supplies	936	3,833	2,898	23,929	26,833	2,905	46,000
Software	786	-	(786)	14,136	-	(14,136)	-
Office Expense	2,885	833	(2,052)	16,194	5,833	(10,361)	10,000
School Fundraising Expense	-	208	208	-	1,458	1,458	2,500
Noncapitalized Equipment	2,855	-	(2,855)	88,412	118,000	29,588	118,000
Total Books & Supplies	7,496	4,875	(2,621)	163,902	174,125	10,223	198,500
Subagreement Services							
Nursing	3,958	-	(3,958)	11,873	-	(11,873)	-
Special Education	8,284	11,647	3,363	53,881	69,884	16,002	128,120
Security	-	136	136	855	818	(37)	1,500
Total Subagreement Services	12,242	11,784	(458)	66,609	70,702	4,093	129,620
Operations & Housekeeping							
Auto and Travel	-	273	273	-	1,636	1,636	3,000
Dues & Memberships	-	83	83	3,885	583	(3,302)	1,000
Insurance	3,554	3,202	(352)	23,031	22,412	(618)	38,421
Utilities	4,490	5,833	1,343	36,100	40,833	4,734	70,000
Janitorial Services	923	917	(6)	5,566	6,417	851	11,000
Communications	463	833	370	11,681	5,833	(5,848)	10,000
Postage and Shipping	258	100	(158)	1,513	500	(1,013)	1,000
Total Operations & Housekeeping	9,688	11,241	1,553	81,775	78,215	(3,560)	134,421
Facilities, Repairs & Other Leases							
Rent	48,867	48,867	-	342,069	342,069	-	586,404
Equipment Leases	1,666	1,450	(216)	8,605	10,150	1,545	17,400
Repairs and Maintenance	76	633	558	753	4,433	3,680	7,600
Total Facilities, Repairs & Other Leases	50,609	50,950	341	351,427	356,652	5,226	611,404
Professional/Consulting Services							
IT	9,213	1,017	(8,196)	22,457	7,117	(15,340)	12,200
Audit & Taxes	1,575	-	(1,575)	12,548	3,500	(9,047)	3,500
Legal	-	625	625	1,336	4,375	3,039	7,500
Professional Development	280	500	220	7,665	2,500	(5,165)	5,000
General Consulting	1,696	2,035	339	12,619	10,174	(2,446)	20,347
Special Activities/Field Trips	-	3,333	3,333	(940)	6,667	7,607	10,000
Other Taxes and Fees	1,052	300	(752)	5,445	1,500	(3,945)	3,000
Payroll Service Fee	579	408	(171)	3,694	2,858	(836)	4,900
Management Fee	6,317	6,146	(171)	42,116	43,023	907	73,754
District Oversight Fee	2,633	2,727	94	9,158	12,714	3,556	26,787
Public Relations/Recruitment	200	300	100	1,205	1,500	295	3,000
Total Professional/Consulting Services	23,545	17,392	(6,153)	117,304	95,927	(21,376)	169,988
Depreciation							
Depreciation Expense	1,619	1,619	-	11,332	11,332	-	19,426
Total Depreciation	1,619	1,619	-	11,332	11,332	-	19,426
Interest							
Interest Expense	453	-	(453)	3,135	-	(3,135)	-
Total Interest	453	-	(453)	3,135	-	(3,135)	-
Total Expenses	304,969	322,178	17,210	2,127,128	2,285,358	158,230	3,589,901
Change in Net Assets	86,639	183,099	(96,460)	(480,070)	(441,725)	(38,345)	97,802
Net Assets, Beginning of Period	(35,381)			531,327			
Net Assets, End of Period	\$ 51,258			\$ 51,258			

Blue Oak Charter School

Accounts Payable Aging

January 31, 2021

Vendor Name	Invoice/Credit Number	Invoice Date	Date Due	Current	1 - 30 Days Past Due	31 - 60 Days Past Due	61 - 90 Days Past Due	Over 90 Days Past Due	Total
Maggie Buckley	BUCK012821	1/28/2021	1/28/2021	\$ -	\$ 1	\$ -	\$ -	\$ -	\$ 1
Total Outstanding Invoices				\$ -	\$ 1	\$ -	\$ -	\$ -	\$ 1

Blue Oak Charter School

Check Register

For the period ended January 31, 2021

Check Number	Vendor Name	Check Date	Check Amount
10419	Blue Shield of California	1/6/2021	\$ 331.60
10420	California Water Service	1/6/2021	789.52
10421	Charter Impact	1/6/2021	6,896.00
10422	CliftonLarsonAllen LLP	1/6/2021	1,575.00
10423	Comcast	1/6/2021	2,444.60
10424	Comcast	1/6/2021	279.44
10425	Department of Justice	1/6/2021	64.00
10426	Elizabeth Fuller	1/6/2021	375.00
10427	Employers Preferred Ins. Co.	1/6/2021	1,009.10
10428	Evergreen Janitorial Supply Inc	1/6/2021	44.74
10429	Full Circle Speech Therapy	1/6/2021	3,840.00
10430	Humana Insurance Co	1/6/2021	2,001.62
10431	Lotus Educational Services, Inc.	1/6/2021	1,875.60
10432	Mercurius Art Makes Sense	1/6/2021	97.34
10433	PG&E	1/6/2021	3,467.81
10434	Philadelphia Insurance Companies	1/6/2021	1,871.68
10435	Recology Butte Colusa Counties	1/6/2021	922.94
10436	STREAM Charter School	1/6/2021	2,193.75
10437	TIAA Commercial Finance, Inc.	1/6/2021	665.19
10438	TIAA Commercial Finance, Inc.	1/6/2021	316.01
10439	Syncb/Amazon	1/12/2021	4,438.58
10440	TIAA Commercial Finance, Inc.	1/12/2021	685.19
10441	Anthem Blue Cross	1/28/2021	14,830.57
10442	Chico Country Day School	1/28/2021	3,957.52
10443	Comcast	1/28/2021	2,448.15
10444	Leen-Liberty Park	1/28/2021	48,866.97
10445	Staples	1/28/2021	4,320.00
10446	Susan Whittlesey	1/28/2021	12.74
10447	Sutherland Landscape Center	1/28/2021	75.54
7304	Growing Up Chico Magazine	1/1/2021	Void
7306	Growing Up Chico Magazine	1/19/2021	200.00
APBOC212801-01	Maggie Buckley	1/28/2021	Void
ACH	Postal Plus	1/5/2021	239.98
ACH	Sprint	1/5/2021	33.59
ACH	Employment Development Department	1/7/2021	6.00
ACH	Employment Development Dept	1/11/2021	30.21
ACH	Employment Development Dept	1/11/2021	88.70
ACH	Internal Revenue Services	1/11/2021	1,234.17
ACH	Benefit Resource, Inc	1/12/2021	137.50
ACH	Employment Development Dept	1/12/2021	231.86
ACH	Walmart	1/14/2021	2,261.89

Blue Oak Charter School

Check Register

For the period ended January 31, 2021

Check Number	Vendor Name	Check Date	Check Amount
ACH	Benefit Resource, Inc	1/15/2021	104.00
ACH	CalPERS	1/21/2021	2,579.04
ACH	CalPERS	1/21/2021	7,437.28
ACH	Waldorf Early Childhood Association of North America	1/26/2021	100.00
ACH	Internal Revenue Services	1/27/2021	18,643.07
ACH	Employment Development Dept	1/27/2021	3,378.94
ACH	Employment Development Dept	1/27/2021	1,668.52
ACH	Benefit Resource, Inc	1/27/2021	1,282.71
ACH	GIA Publications, Inc.	1/25/2021	34.34
ACH	Stamp.com	1/28/2021	<u>17.99</u>

Total Disbursements Issued in January \$ 150,405.99

Business Checking – XXXXX0889

Search transactions

Activity: Date range; Start date: Dec 01, 2020; End date: Dec 31, 2020; Type: Debits

Transactions

🕒 Pending ● Posted

Date ▼	Description ◇	Debit ◇	Credit ◇	Balance
● Dec 31, 2020	<u>Check 10416</u>	1,871.68		
● Dec 30, 2020	<u>Check 10415</u>	350.00		
● Dec 29, 2020	<u>Check 70088</u>	219.24		
● Dec 29, 2020	ACH Payment BENEFIT RESOURCE BRI XFER	1,420.21		
● Dec 28, 2020	ACH Payment EMPLOYMENT DEVEL EDD EFTPMT	3,419.01		
● Dec 28, 2020	ACH Payment EMPLOYMENT DEVEL EDD EFTPMT	1,403.60		
● Dec 28, 2020	ACH Payment IRS USATAXPYMT	18,902.76		
● Dec 28, 2020	ATM RCR Payment STAMPS.COM 855-608-2677 CA #3136	17.99		
● Dec 24, 2020	<u>Check 10409</u>	6,847.54		
● Dec 24, 2020	ACH Payment BLUE OAK CHARTER PAYROLL	69,241.82		
● Dec 24, 2020	ACH Payment BLUE OAK CHARTER PAYROLL	9,882.58		
● Dec 24, 2020	ACH Payment BLUE OAK CHARTER PAYROLL	2,795.03		
● Dec 24, 2020	ACH Payment BLUE OAK CHARTER PAYROLL	3,878.86		
● Dec 24, 2020	ACH Payment BLUE OAK CHARTER PAYROLL	13,826.98		
● Dec 22, 2020	<u>Check 10410</u>	1,837.50		
● Dec 22, 2020	<u>Check 10382</u>	3,983.24		

Date ▼	Description ◇	Debit ◇	Credit ◇	Balance
● Dec 22, 2020	<u>Check 10418</u>	1,593.75		
● Dec 22, 2020	<u>Check 10411</u>	7,680.00		
● Dec 22, 2020	<u>Check 10412</u>	85.00		
● Dec 21, 2020	<u>Check 10377</u>	2,145.00		
● Dec 21, 2020	<u>Check 10401</u>	1,009.10		
● Dec 21, 2020	ACH Payment CALPERS 3100	7,717.38		
● Dec 21, 2020	ACH Payment CALPERS 3100	2,390.34		
● Dec 21, 2020	<u>Check 10368</u>	37.39		
● Dec 21, 2020	<u>Check 10414</u>	48,866.97		
● Dec 18, 2020	<u>Check 10398</u>	19,724.43		
● Dec 18, 2020	<u>Check 10394</u>	500.00		
● Dec 17, 2020	<u>Check 10405</u>	3,177.94		
● Dec 17, 2020	<u>Check 70087</u>	109.62		
● Dec 16, 2020	<u>Check 10400</u>	355.00		
● Dec 16, 2020	<u>Check 10404</u>	257.40		
● Dec 16, 2020	<u>Check 10367</u>	15,778.19		
● Dec 16, 2020	<u>Check 10403</u>	904.50		
● Dec 16, 2020	<u>Check 10402</u>	251.48		
● Dec 16, 2020	<u>Check 10406</u>	309.59		
● Dec 15, 2020	ACH Payment BENEFIT RESOURCE BRI XFER	104.00		
● Dec 15, 2020	<u>Check 10397</u>	331.60		
● Dec 15, 2020	<u>Check 10399</u>	675.47		
● Dec 14, 2020	POS Purchase ALAMEDA ELECTRICAL DI 530-781-1300 CA #3136 Maintenance/Repairs for kitchen refrigerator part-replacement	182.60		
● Dec 14, 2020	<u>Check 10395</u>	323.61		
● Dec 14, 2020	ACH Payment BENEFIT RESOURCE BRI XFER	137.50		

Date ▼	Description ◇	Debit ◇	Credit ◇	Balance
● Dec 14, 2020	ATM RCR Payment DNH*GODADDY.COM 480-5058855 AZ #3136 <i>Auto renewal #2 final</i>	239.88		
● Dec 11, 2020	<u>Check 10385</u>	1,514.70		
● Dec 11, 2020	ACH Payment IRS USATAXPYMT	2,233.82		
● Dec 11, 2020	ACH Payment EMPLOYMENT DEVEL EDD EFTPMT	125.49		
● Dec 11, 2020	ACH Payment EMPLOYMENT DEVEL EDD EFTPMT	87.72		
● Dec 11, 2020	<u>Check 10396</u>	834.76		
● Dec 11, 2020	<u>Check 10388</u>	300.21		
● Dec 10, 2020	ACH Payment BLUE OAK CHARTER PAYROLL	8,442.84		
● Dec 10, 2020	<u>Check 10379</u>	1,138.00		
● Dec 10, 2020	<u>Check 10383</u>	17.84		
● Dec 10, 2020	<u>Check 10373</u>	2,495.80		
● Dec 10, 2020	ACH Payment BLUE OAK CHARTER PAYROLL	1,590.26		
● Dec 10, 2020	<u>Check 10372</u>	173.00		
● Dec 10, 2020	<u>Check 10369</u>	3,375.00		
● Dec 09, 2020	<u>Check 10391</u>	37.00		
● Dec 09, 2020	<u>Check 10376</u>	79.00		
● Dec 09, 2020	<u>Check 10375</u>	1,529.60		
● Dec 09, 2020	<u>Check 10387</u>	350.00		
● Dec 08, 2020	<u>Check 10366</u>	217.97		
● Dec 08, 2020	<u>Check 10381</u>	7,680.00		
● Dec 08, 2020	<u>Check 70071</u>	5.35		
● Dec 08, 2020	<u>Check 10378</u>	375.00		
● Dec 08, 2020	<u>Check 10386</u>	279.20		

Date ▼	Description ↕	Debit ↕	Credit ↕	Balance
● Dec 08, 2020	<u>Check 10389</u>	1,871.68		
● Dec 08, 2020	<u>Check 10371</u>	6,337.00		
● Dec 07, 2020	<u>Check 10370</u>	846.23		
● Dec 07, 2020	<u>Check 10393</u>	7,226.51		
● Dec 07, 2020	<u>Check 10392</u>	32.16		
● Dec 07, 2020	POS Purchase POSTAL PLUS 530-8911626 CA #3136	60.00		
● Dec 07, 2020	<u>Check 10374</u>	278.13		
● Dec 07, 2020	<u>Check 10380</u>	1,292.08		
● Dec 07, 2020	<u>Check 70074</u>	7.01		
● Dec 04, 2020	ACH Payment SPRINT8006396111 ACHBILLPAY G8Y35LSKZPNFP3YD	33.52		
● Dec 03, 2020	<u>Check 10364</u>	60.00		
● Dec 01, 2020	<u>Check 70072</u>	8.37		
● Dec 01, 2020	ACH Payment BENEFIT RESOURCE BRI XFER	1,420.21		
● Dec 01, 2020	<u>Check 70078</u>	10.50		

Business Checking – XXXXX0889

Search transactions

Activity: Date range; Start date: Jan 01, 2021; End date: Jan 31, 2021; Type: Debits

Transactions

🕒 Pending ● Posted

Date ▼	Description ↕	Debit ↕	Credit ↕	Balance
● Jan 28, 2021	<u>Check 70083</u>	12.04		
● Jan 28, 2021	ACH Payment BENEFIT RESOURCE BRI XFER	137.50		
● Jan 27, 2021	ACH Payment IRS USATAXPYMT	18,643.07		
● Jan 27, 2021	ACH Payment EMPLOYMENT DEVEL EDD EFTPMT	3,378.94		
● Jan 27, 2021	ACH Payment EMPLOYMENT DEVEL EDD EFTPMT	1,668.52		
● Jan 27, 2021	ACH Payment BENEFIT RESOURCE BRI XFER	1,282.71		
● Jan 26, 2021	<u>Check 10440</u>	685.19		
● Jan 26, 2021	ACH Payment BLUE OAK CHARTER PAYROLL	69,698.92		
● Jan 26, 2021	ACH Payment BLUE OAK CHARTER PAYROLL	12,597.33		
● Jan 26, 2021	ACH Payment BLUE OAK CHARTER PAYROLL	9,878.71		
● Jan 26, 2021	ACH Payment BLUE OAK CHARTER PAYROLL	4,067.39		
● Jan 26, 2021	ACH Payment BLUE OAK CHARTER PAYROLL	3,450.00		
● Jan 26, 2021	POS Purchase WALDORFEARL 845-352-1690 NY #3136 Professional Development - K	100.00		
● Jan 25, 2021	<u>Check 10433</u>	3,467.81		
● Jan 25, 2021	POS Purchase GIA PUBLICATIONS INC 800- 4421358 IL #3136 Professional Development - K (Book)	34.34		
● Jan 21, 2021	<u>Check 10408</u>	427.50		

Date ▼	Description ◇	Debit ◇	Credit ◇	Balance
● Jan 21, 2021	ACH Payment CALPERS 3100	7,437.28		
● Jan 21, 2021	ACH Payment CALPERS 3100	2,579.04		
● Jan 19, 2021	<u>Check 10439</u>	4,438.58		
● Jan 19, 2021	<u>Check 10437</u>	665.19		
● Jan 19, 2021	<u>Check 10426</u>	375.00		
● Jan 19, 2021	<u>Check 10438</u>	316.01		
● Jan 19, 2021	<u>Check 7306</u>	200.00		
● Jan 19, 2021	<u>Check 70070</u>	2.68		
● Jan 15, 2021	<u>Check 10423</u>	2,444.60		
● Jan 15, 2021	<u>Check 10420</u>	789.52		
● Jan 15, 2021	ACH Payment BENEFIT RESOURCE BRI XFER	104.00		
● Jan 14, 2021	<u>Check 10429</u>	3,840.00		
● Jan 14, 2021	<u>Check 10436</u>	2,193.75		
● Jan 14, 2021	<u>Check 10427</u>	1,009.10		
● Jan 14, 2021	<u>Check 10425</u>	64.00		
● Jan 14, 2021	<u>Check 10348</u>	10.68		
● Jan 14, 2021	POS Purchase WALMART.COM BENTONVILLE AR #3136 <i>WEB CAMERAS - Distance Learning</i>	2,261.89		
● Jan 13, 2021	<u>Check 10434</u>	1,871.68		
● Jan 13, 2021	<u>Check 10428</u>	44.74		
● Jan 12, 2021	<u>Check 10421</u>	6,896.00		
● Jan 12, 2021	<u>Check 10424</u>	279.44		
● Jan 12, 2021	ACH Payment EMPLOYMENT DEVEL EDD EFTPMT	231.86		
● Jan 12, 2021	ACH Payment BENEFIT RESOURCE BRI XFER	137.50		
● Jan 11, 2021	<u>Check 107428</u>	2,006.25		

Date ▼	Description ↕	Debit ↕	Credit ↕	Balance
● Jan 11, 2021	<u>Check 10431</u>	1,875.60		
● Jan 11, 2021	<u>Check 10422</u>	1,575.00		
● Jan 11, 2021	<u>Check 10419</u>	331.60		
● Jan 11, 2021	<u>Check 107430</u>	316.01		
● Jan 11, 2021	ACH Payment IRS USATAXPYMT	1,234.17		
● Jan 11, 2021	ACH Payment EMPLOYMENT DEVEL EDD EFTPMT	88.70		
● Jan 11, 2021	ACH Payment EMPLOYMENT DEVEL EDD EFTPMT	30.21		
● Jan 08, 2021	<u>Check 107422</u>	89.00		
● Jan 08, 2021	ACH Payment BLUE OAK CHARTER PAYROLL	4,862.00		
● Jan 08, 2021	ACH Payment BLUE OAK CHARTER PAYROLL	1,143.21		
● Jan 07, 2021	<u>Check 107421</u>	1,978.76		

Agenda Item: Accept Donations/Thank Yous/Giving Campaign Donations

Prepared by: Alexandra Archer

Charter Council Date: 02/09/2021

Background Information:

Blue Oak would like to accept donations, from donors who gave \$500.00 or more, received in January 2021.

Donors who gave \$500.00 or more:

- 01/14/2021 - Mrs. Gladys Thatcher - \$500.00 for General Funds

We would like to say thank you to all who have donated to Blue Oak Charter School.

FINAL PAY

Employees who are discharged must be paid all wages due at the time of termination. “All wages” include any earned, but unused vacation pay. There is no requirement under California law that an employer pay accrued sick leave upon termination. An employer must pay a discharged employee at the place of discharge.

An employee who does not have a written agreement for a definite period of employment and who quits without giving prior notice, must be paid his or her wages within 72 hours. If the employee gives at least 72 hours notice of his or her intention to quit, those wages must be paid at the time of quitting. An employee who quits must be paid at the office or agency of the employer in the county where the employee worked. An employee who quits without 72 hours notice may request that his or her final wage payment be mailed to a designated address. The date of mailing will be considered the date of payment.

An employer who willfully fails to pay any wages due an employee who is discharged or quits within the time frames, may be assessed continuing wages as a penalty from the date the wages were due up to a maximum of 30 days. The penalty is calculated by multiplying the daily wage rate of the employee by 30 days. Penalties may be avoided if the employer can show that a good-faith dispute existed concerning whether any wages were due. A “good-faith” dispute means that the employer’s defense, based on law or fact, if successful, would preclude any recovery on part of the employee.

Even if there is a dispute, the employer must pay, without requiring a release, whatever wages are due and not in dispute. If the employer fails to pay what is undisputed, the “good faith” defense will be defeated whatever the outcome of the disputed wages.

SEVERANCE PAY

There is no legal requirement under California law that employers provide severance pay to an employee upon termination of employment. Employees should refer to their employer’s policy with respect to severance pay. Severance pay plans provided by an employer pursuant to the Employee Retirement Income Security Act of 1974, 29 U.S.C. § 1001, et seq., are subject to federal law. In certain limited situations, California laws may apply. However, a thorough review of the facts is necessary before a determination can be made.

UNEMPLOYMENT INSURANCE

California participates in a joint federal/state unemployment insurance program, which is designed to reduce the impact of economic fluctuations and assist those persons who become unemployed through no fault of their own.

With few exceptions, all California employers are covered under the unemployment insurance law and must pay the appropriate unemployment insurance tax. A former employee will be ineligible for benefits if he or she is out of work for one of the following reasons:

1. Voluntary quit without good cause;
2. Discharge for willful misconduct;
3. Refusal of suitable work;

Employers are given the opportunity to respond to a claim for unemployment insurance by a former employee. Employers and employees that disagree with the final determination of a benefit payment have the right to appeal the determination.

**Blue Oak Charter School:
Strategic Planning
Final Report**



BLUE OAK SCHOOL

A WALDORF-INSPIRED PUBLIC CHARTER (K-8)

**November 21, 2019
Prepared by Consuelo Gonzalez, MPA**

Executive Summary

A study of Blue Oaks Charter School's internal strengths and weaknesses along with the school's external opportunities and threats marks an essential step in its strategic plan. This study was conducted in three phases. First, survey data was collected to map the opportunity landscape of the school. Next, a tailored Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis was carried out. Finally, a strategic planning workshop was facilitated. Together, this first provided quantitative data aimed to determine the current state of Blue Oak Charter School and how it arrived at such a state. A deeper analysis of the data then provided an assessment of those conditions from within the campus and beyond, competing needs, to develop Specific, Measurable, Attainable, and Time-bound (SMART) goals while utilizing the stakeholder's input.

Several features of Blue Oak Charter School emerged from this study. Blue Oak Charter School has established strengths that truly entitle it to promote the Waldorf education philosophy in the city of Chico and surrounding communities. The School has the potential to continue to thrive during the transition to a more permanent physical location given the strong community and educational setting of the Waldorf philosophy. Blue Oak Charter School can build solid relationships and expand its community to increase parent involvement facilitating parent communication by using a variety of platforms that will create impact for positive change.

While Blue Oak Charter School has developed strong support among its current most active stakeholders, its community network of support is in need of expansion. For example, the school has established standard forms of communications and informational materials, such as handouts with talking points on Waldorf education; however, at some point, there needs to be an assessment of the efficacy of current methods of communicating knowledge. This assessment can aid in determining the most effective method to inform all possible stakeholders. This includes school-wide training on understanding the Waldorf philosophy, teacher-to-teacher training, and assessment of the implementation of consistent behavior goals throughout the school. Such modifications would likely address the need for sustainability and financial stability as well as the generation of new fundraising opportunities that include grants or donations.

Moreover, expansion outside of its current community is an opportunity to extend outreach to more stakeholders, such as potential new students, parents, local media, business owners, local industry and governmental representatives. All possible external competing educational ideas and schools that could be viewed as threats could be mitigated or eliminated by developing solid relationships with key stakeholders that will advocate for the school's sustainable existence. It is essential to eliminate some possible weaknesses and external threats and turn these into possible opportunities for growth. Additionally, Blue Oak Charter School has an opportunity to promote school-wide team building at all levels by providing workshops or events for students, teachers, and parents to address how to deal with student issues and fully establish a better understanding of what are the values of Waldorf educational philosophy.

The strategic plan set with SMART goals is data-driven and aligns with the vision and the mission of Blue Oak Charter School. In implementing the Strategic Plan, Task Forces with a specific subset of well-defined goals should be assembled. Across all implementation stages, the values of transparency, accountability, and trust-building among all the stakeholders should be upheld. The greatest strength in realizing the goals of the strategic plan is that Blue Oak Charters School is an entity defined by the high quality of its members, structure, and management that can bring the goals of this plan to completion.

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SWOT Analysis Results

Strengths	Weaknesses	Opportunity	Threats
<ol style="list-style-type: none"> 1. Waldorf education settings 2. Nourishing safe learning environment 3. Quality teachers that are student focus 4. Teacher-student relationships 	<ol style="list-style-type: none"> 1. Lack of fundraising, transparency & accountability 2. Students' behavior 3. Lack of parent involvement 4. Lack of communication 	<ol style="list-style-type: none"> 1. Waldorf education philosophy & pedagogy 2. Offer technology, art, other languages & more hands on learning 3. Provide learning opportunities to educate parents 4. Parent involvement 	<ol style="list-style-type: none"> 1. Employee turnover/low number of staff 2. Students' behavior 3. Volatile economy & financial sustainability 4. Adverse government policies

BLUE OAK SCHOOL
A WALDORF-INSPIRED PUBLIC CHARTER (K-8)

Figure 1 . Blue Oak Charter School's Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis result matrix conducted in Spring 2019.

The results of the SWOT analysis is based on the data gathered from a SurveyMonkey link sent to stakeholders. The results reported to be crucial are determined by themes and the frequency of phrases in the answers provided by the respondents. Blue Oak Charter School had five percent response given an estimated seven hundred possible emails assumed to be all stakeholders. Other themes emerged; however, it is recommended to focus on the top three to four themes and strategically focus resources and create fulfilling SMART goals.

SWOT Large Group Matrix

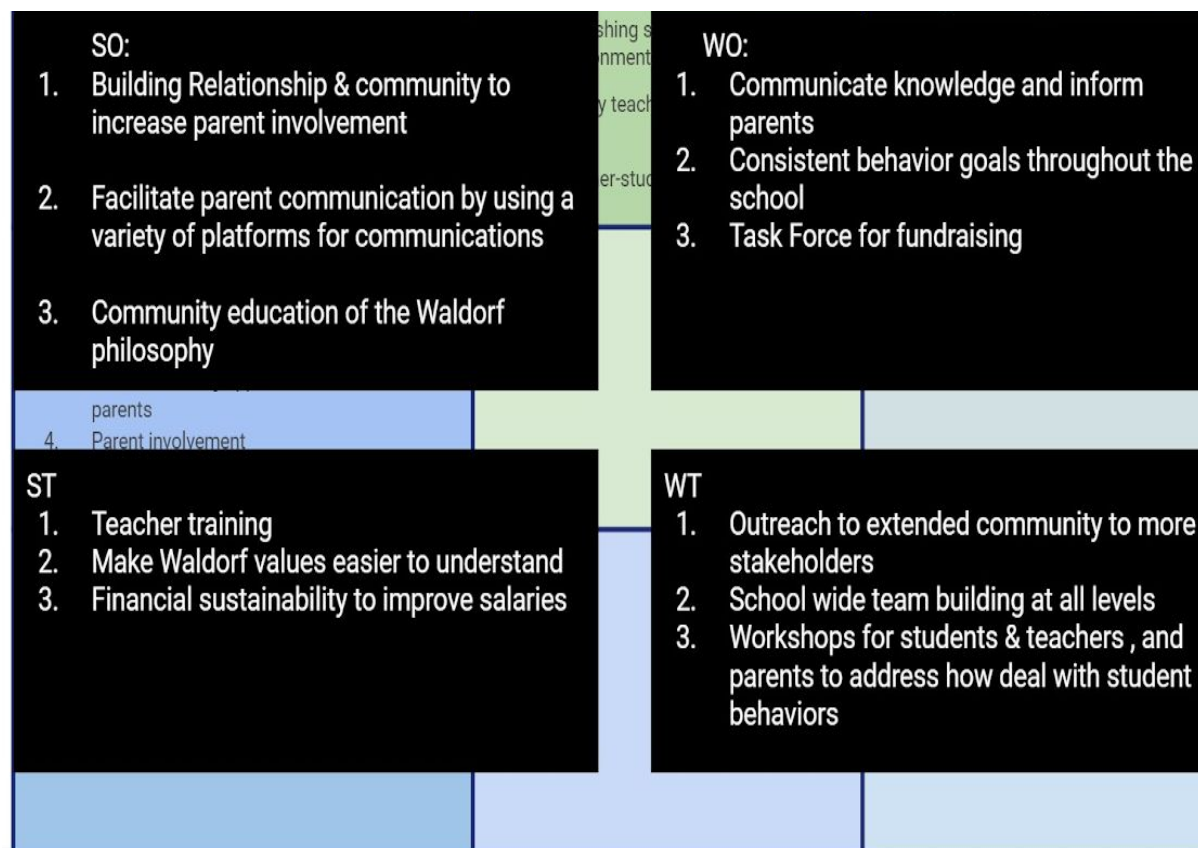


Figure 2. SWOT Matrix generated in strategic training and planning session November 9, 2019.

The SWOT Matrix shown in figure 2 was generated during the strategic training and planning at Blue Oak Charter School in Chico, California. The SWOT matrix was developed using the input of 15 stakeholders that attended the strategic training and planning session. Also, the SWOT matrix was generated from the collection of individuals SWOT matrices, and small group matrices and a large group discussion.

- SO Quadrant - Opportunities to Pursue
- ST Quadrant - Threats to Eliminate
- WO Quadrant - Things to Improve
- WT Quadrant - Risk Mitigation & Avoidance

BLUE OAK CHARTER SCHOOL STRATEGIC PLANNING FINAL REPORT

Strategic Plan

Vision: To be a model for the successful education of the whole child.

Mission: To nurture and deepen each child's academic and creative capacities using methods inspired by Waldorf education in a public school setting.

July 1, 2019 to June 1, 2020

Goal 1: Create a task force that will propose a sustainable school design with a single track scenario and a double-track scenario to be vetted through appropriate channels by or before **May 30, 2020**.

Goal 2: Create an In/Outreach Task Force that will determine the needs for further in-reach and outreach aligned with the mission and vision of Blue Oak Charter School consisting of parents, community members, Waldorf certified teachers, staff and perhaps two students appropriately selected to assist by or before **June 1, 2020**. The In/outreach task force will report to the designated administrator.

Sub-goals could be articulated as follows:

- The task force will determine at least four platforms that Blue Oak Charter School will use to reach 1,000 people a month to inform parents and community.
- The task force will identify a current Blue Oak Charters School handout with 5 to 8 key points that will be used to inform and inspire students, parents and community.

BLUE OAK CHARTER SCHOOL STRATEGIC PLANNING FINAL REPORT

Goal 3: Create a Fundraising Task Force that will **apply to at least 5 new grant or donation** opportunities. The task force will consist of parents, community members, Waldorf certified teachers, and staff by or before **June 30, 2020**.

July 1,

Goal 1: Finalize the plan for a sustainable school and develop a transition plan by or before **December 31, 2020**.

Goal 2: The In/Outreach Task Force will recommend two on-going events to the school's calendar to improve engagement of all stakeholders and the **media will be invited by December 31, 2020**.

Goal 3: Finalized the Blue Oak Charter school building options for a permanent home in regards to purchasing land to build, renewing a lease, etc. by **March 30, 2021**.

Goal 4: Plan, develop and implement the student behavior plan to assure that 100% of the Blue Oak faculty and staff will use the agreed-upon rules and tools for behavior and support at least 90% of the time by or before **June 30, 2021**.

July 1,

Goal 1: Blue Oak Charter School will have **100% family utilization** of a least **one platform for communication** by or before **August 1, 2021**.

Goal 2: To have a **Professional Development Staff-Wide Plan** in place that will align with the Blue Oak Charter School's vision and mission and promote Waldorf education by or before **June 30, 2022**.

Goal 3: Blue Oak Charter School will have **stable enrollment** as defined by the sustainable school task force to support the financial needs of the school that will facilitate Blue Oak charter school renewal by **June 30, 2022**.

Goal 4: A rough draft of charter renewal will be completed by **June 30, 2022**.

Recommendations

The strategic planning process is crucial to better serve students at Blue Oak Charter School and it must involve all stakeholders. Appendix A and B consist of word clouds and raw data as exhibits of the analysis and work done; however, it is not recommended to dwell on any singular comment given by the respondents since the purpose of the survey is meant to be used as aggregate data in awareness of confidentiality of the respondents and for the sole purpose of the SWOT analysis results, analyzed by the professional expert.

The following are recommendations to further assist the fulfillment of the strategic plan and the accomplishment of the SMART goals.

1. Strategic Management must be implemented to execute the strategic plan.
 - a. The strategic plan is a dynamic document that must be in constant review as goals are achieved and/or modified to meet the vision and mission of the organization; therefore, it is encouraged to review the plan in key meetings to make sure the developed SMART goals are still aligned with the vision and the mission of Blue Oak Charter School.
 - b. Leadership behavior must adjust to meet strategic goals.
 - c. A constant analysis of the environment must occur for the strategy to fit the structure.

BLUE OAK CHARTER SCHOOL STRATEGIC PLANNING FINAL REPORT

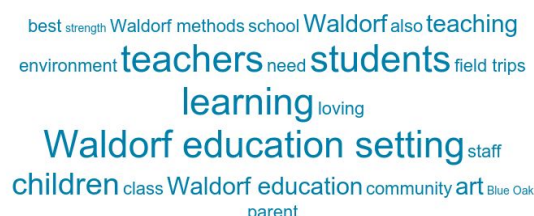
- d. Cultural compatibility of the strategy must be identified for the success of Blue Oak Charter School.
2. It is imperative that the mission, vision and strategic goals of the whole group are combined with accomplishments that align with beliefs, attitudes and the collective of stakeholders.
3. Waldorf's education and philosophy should be disseminated to the extended community to include other parties, such as industry, government officials, and successful alumni that will champion and support the school in order to be sustainable.

Appendix A

SWOT Word Clouds

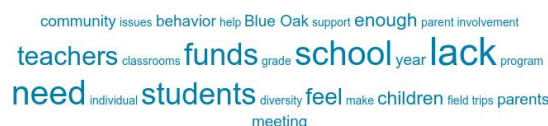
Word clouds (also known as text clouds or tag clouds) work in a simple way: the more a specific word appears in a source of textual data, the larger the word represented in font size.

Q1 Strengths: These are usually internal, but can sometimes be external. What specific advantages and unique resources does Blue Oak Charter School have in regards to educating their students and sparking excitement for learning? (E.g. After-school programs, effective faculty/staff/administrators, Waldorf education setting, etc.)



A word cloud for Q1 Strengths. The words are in shades of blue. The most prominent words are 'Waldorf education setting', 'learning', 'teachers', 'students', 'Waldorf methods', 'best strength', 'need', 'field trips', 'loving', 'staff', 'children', 'class', 'Waldorf education', 'community art', 'Blue Oak', and 'parent'.

Q2 Weaknesses: These are usually internal, but can sometimes be external. What would you say is an area or quality of the institution that the competing/leading school strives in? (E.g. involved and supportive parents and community, lack of funds to establish cultural events/traditions, not enough diversity in the school, etc.)



A word cloud for Q2 Weaknesses. The words are in shades of blue. The most prominent words are 'need', 'students', 'funds', 'school', 'year', 'lack', 'teachers', 'classrooms', 'grade', 'program', 'community issues', 'behavior help', 'Blue Oak support', 'enough', 'parent involvement', 'individual', 'diversity', 'feel', 'make', 'children', 'field trips', 'parents', and 'meeting'.

Q3 Opportunities: These are usually external, but can sometimes be internal. What opportunities can Blue Oak pursue in terms of staying aligned with the school's mission statement? What trends are you aware of? (E.g. new technology, changes in government policy, changes in social patterns, population profiles, etc.)



A word cloud for Q3 Opportunities. The words are in shades of blue. The most prominent words are 'opportunities', 'school', 'need', 'teachers', 'also', 'programs', 'classes', 'Children', 'love', 'see', 'grades', 'Waldorf', 'students', 'teaching', 'Better', and 'learning'.

Q4 Threats: These are usually external, but can sometimes be internal. What obstacles does Blue Oak School face that you believe might affect the alignment of the mission statement? (E.g. volatile economy, adverse government policies, insufficient after-school programs, lack of staff/faculty/administrators engagement, etc.)



A word cloud for Q4 Threats. The words are in shades of blue. The most prominent words are 'teachers', 'school', 'staff', 'Lack', 'issues', 'Blue Oak', 'enrollment', 'children', 'years', 'adverse government policies', 'support', 'lack staff', 'need', 'work', 'feel', 'see', and 'programs'.

BLUE OAK CHARTER SCHOOL STRATEGIC PLANNING FINAL REPORT

Intention for this Training World Cloud



Community Building Activity World Cloud



Appendix B

SWOT Raw Data

Q1 Strengths:

These are usually internal, but can sometimes be external. What specific advantages and unique resources does Blue Oak Charter School have in regards to educating their students and sparking excitement for learning? (E.g. After-school programs, effective faculty/staff/administrators, Waldorf education setting, etc.)

Answered:

34 Skipped: 0 # RESPONSES DATE

1. Engaged and dedicated teachers, unique clubs, friendly environment and hands on approach to leaning. 5/28/2019 4:16 PM
2. Blue Oak's Waldorf method does foster "creative and engaged" students, who have the best opportunity to become "self-motivated, competent, and lifelong learners." The goal of "teaching subject matter when children are at the appropriate developmental stage for learning" seems best met at the lower grade levels. 5/21/2019 3:33 PM
3. Waldorf education, small classes, Nurtured Heart 5/20/2019 4:31 PM
4. Encouragement of individuals pace, interests, creativity, imagination and style of learning. Nourishing emotional needs, and connection with one another, nature and its rythms, and our world. 5/20/2019 1:30 PM
5. The strength of Blue Oak is that it is based on a Waldorf education system which focuses on the whole child and infuses education with art, music and movement as ways to enhance learning. Blue Oak is strengthened by the administration and teachers who focus on providing a positive environment for each child. The parent volunteers are a strength as they donate time and goods to keep programs going. Keeping children in the same class with the same teacher is s strength as the children learn how to become an important part of a team joined in learning. Lastly I consider the school building to be a strength as it is both beautiful and functional. 5/20/2019 1:12 PM
6. Waldorf Education Setting 5/20/2019 12:01 PM
7. Spanish class 4/28/2019 1:25 PM
8. Dedicated teaching staff, Waldorf methods (when they are being applied), applicable and meaningful field trips, volunteerism, garden program, attentive Executive Director and Assistant, Teams (Behavior Leadership, Academic Leadership); Our Behavior Interventionist demonstrates respect for my teaching and behavior management, and has consistently been a great support for my students in need. 4/25/2019 8:59 PM
9. field trips, beautiful materials, loving teachers 4/25/2019 11:55 AM
10. Looping, long term relationships. After school homework help in math. 4/25/2019 10:42 AM
11. Looping, even with small loops, this would be a strength. Dedicated teachers, many who are Waldorf Trained. High quality products (crayons, pencils, etc). 4/25/2019 9:17 AM
12. We live Jason's teacher. We live that he is giving our son the tools he will need to be successful if High School. He hold them accountable for their assignments and homework. He is fun, but also firm. He is very knowledgeable about the Waldorf pedagogy and is easy to talk to as a parent. He brings in an enthusiasm for teaching and a love for learning. 4/25/2019 7:22 AM
13. Wonderful, nurturing, safe, environment. Love the "extra" stuff Waldorf provides (art, handwork, music ect) 4/24/2019 5:56 PM
14. Waldorf education setting 4/24/2019 11:47 AM

BLUE OAK CHARTER SCHOOL STRATEGIC PLANNING FINAL REPORT

15. A mostly energetic and ingenuitive staff, affordability, long term teachers who carry Waldorf traditions onward, seasonal rhythm, thriving alumni students, stable administration. 4/24/2019 8:57 AM
16. Waldorf education and a accepting loving environment for learning.4/24/2019 8:43 AM 1 / 9
17. Blue Oak fosters creative thinking by incorporating a variety of artistic practices in the curriculum. Teaching through storytelling, painting, drawing, movement, dance, handwork, cooking, creative writing, theater, etc., students are able to see and learn subjects through many different lenses. These practices help to engage a wide variety of thinkers and learners who might be discouraged or fall behind in more traditional learning settings. 4/23/2019 3:26 PM
18. Components of the Waldorf setting, specifically Strings and Spanish. 4/23/2019 12:34 PM
19. BOCS has a very small population. This allows students and teachers to create strong relationships to better support and meet the needs of students. 4/23/2019 12:19 PM
20. Faculty, s'cool moves, handwork, annual events, beautiful work, field trips, clubs, 4/23/2019 12:09 PM
21. Blue Oak charter school offers after school program through our local community card center. Blue Oak charter school I also find have faculty staff and administrators are effective in educating children as a whole being, and many are trained in Waldorf education. 4/23/2019 10:38 AM
22. Waldorf education setting, play-based learning, a long runway for parents and their children to adjust in the kindergarten years, parent involvement, a space for emotional and social development (not just academic advancement); safety of students (thank you for the new locks and for keeping external doors locked during school hours) 4/23/2019 10:33 AM
23. Waldorf methods. Also, the teachers that work so much to uphold Waldorf methods and individually support each student. 4/23/2019 9:55 AM
24. Waldorf methods, active parent engagement, community events, field trips, all the adults whether admin or custodial say hello to my child by name. 4/23/2019 6:45 AM
25. Waldorf Education 4/23/2019 6:31 AM
26. They offer art every day4/22/2019 10:35 PM
27. Waldorf education setting, 4/22/2019 8:13 PM
28. Good teachers, focus on art in curriculum, peaceful setting that teaches conflict resolution skills. Curriculum gives students time to digest the information. 4/22/2019 6:50 PM
29. Strengths are the deep relationships that students and students and students and teachers are able to form. Also, the creative side of children is cherished 4/22/2019 6:05 PM
30. Wonderful staff/community 4/22/2019 5:02 PM
31. Waldorf education setting 4/22/2019 4:30 PM
32. Class size 4/22/2019 2:11 PM
33. Waldorf education setting. The emphasis on the arts and the community feel. 4/22/2019 11:46 AM
34. Waldorf education setting 4/22/2019 11:44 AM

Q2 Weaknesses: These are usually internal, but can sometimes be external. What would you say is an area or quality of the institution that the competing/leading school strives in? (E.g. involved and supportive parents and community, lack of funds to establish cultural events/traditions, not enough diversity in the school, etc.)

Answered:

34 Skipped: 0 # RESPONSES DATE

1. Not enough fundraiser opportunities for school field trip's and supplies. Events can sometimes be unorganized and communication between teachers, council and front office can be confusing as they're not always on the same page. Volunteering can sometimes also be a challenge for the same reason. 5/28/2019 4:16 PM
2. It appears to be a very real challenge for Blue Oak to provide the highest quality education at the 7th and 8th Grade level. Attracting the most qualified teachers is also a challenge. In today's environment, the need for fiscal oversight cannot be underestimated. Public charter schools must exceed the standards, since voters may be persuaded that public funds are not safeguarded. Blue Oak has failed at times to "attract, develop, and retain highly-effective, adaptable faculty, staff and administrators." 5/21/2019 3:33 PM
3. Not sure. Now that Nathan Rose is gone, I can't think of any offhand 5/20/2019 4:31 PM
4. Encouraging community more often, and space for physical movement needs. Also an auditorium for concerts, assemblies, and plays. 5/20/2019 1:30 PM
5. A problem Blue Oak faced was having a dishonest administrator who misused funds who apparently wasn't held accountable by school checks and balances. We now have a new administrator and we have replaced some of the lost funding. The programs that suffered have been music, art and movement. Our school should be offering top notch music lessons. The children are missing the richness promised in a full Waldorf experience. This is also seen in the limited teaching of Spanish. The betrayal of the principal who stole money from the school definitely weakened Blue Oak. 5/20/2019 1:12 PM
6. uninvolved and supportive parents, continued mismanagement of funds, lack of transparency 5/20/2019 12:01 PM
7. Availability of after school paid activities like Fibo art, lego engineering. 4/28/2019 1:25 PM
8. ~ The Food Program offers 'food' that is damaging to children's health, and has negative effects on children's focus and behaviors. No food program would be better than the sugary junk that is poisoning our students breakfast time; ~ We are spending so much money on our rent that we will never be able to provide our students with what they need if this continues; ~ Some of the cornerstones of a Waldorf approach are human connection and experiential learning. Providing students with dittos and homework in the early grades is the opposite approach and has no place in a Waldorf school; ~ Another cornerstone is the artistic development and inner work of Waldorf educators. Unless a teacher is doing this completely independently and on their own time, there is no artistic or meditative work happening. It is not happening at the group level (faculty meetings); ~ Lack of Recycling Program: we should be models of protectors of the Earth for our younger generation. 4/25/2019 8:59 PM
9. lack of passion for reading and teaching reading 4/25/2019 11:55 AM
10. Low pay scale may not attract most qualified applicants. Lack of ethnic diversity. Lack of quality science instruction, lab, etc. 4/25/2019 10:42 AM
11. Lack of funds for the high cost field trips required- we are a title I school and Parent Council does so much fundraising, it makes it difficult as a class to come up with ideas/resources. This needs to be addressed as a whole school, not individual classrooms. School spirit around events- very disjointed

BLUE OAK CHARTER SCHOOL STRATEGIC PLANNING FINAL REPORT

and not unifying. Science department/equipment. Fear culture around job security never feeling that a job is secure because numbers could change and several people have lost their job after the year has started 4/25/2019 9:17 AM

12. There is not enough parent involvement. It is always the same parents doing everything. I don't think the administrators are in the classrooms enough. If they were roaming the school and in the classrooms, I feel like there would be less behavior problems. Not enough admin support for behaviors in the classroom. We need more no tolerance for certain behaviors that have been allowed to go on for years. More support for fire survivors would have been wonderful. Even if we had check ins with families or individual staff for individual needs. There are many students/staff/faculty that are still struggling in many different ways. 4/25/2019 7:22 AM
13. Weak on academics. Could use more direct instruction especially for kids who are struggling and SPED kids. Clear behavior expectations for students including what punishments should be. 4/24/2019 5:56 PM
14. Not enough follow through with behavior. Lack of consistent plans for behavior. 4/24/2019 11:47 AM
15. The school is sloppy professionally and physically. The school lacks a field. The needs of poorly behaved children are put before well behaved children. 4/24/2019 8:57 AM
16. Lack of needed school employees to assist other school employees in effectively doing their jobs. 4/24/2019 8:43 AM
17. -There have been so many drastic challenges and changes in the school culture over the years that I think many parents feel like it's difficult to connect and therefore parent involvement has waned. So much of what we offer takes a lot of help and when parents don't put in their volunteer hours, the quality of field trips, festivals and in class projects suffers. -Many incoming families don't understand what Waldorf education entails and it's difficult to maintain standards when parents aren't informed and working with teachers. -Funding has always been an issue. We offer very involved in-class projects, high quality materials and amazing field trips, but it often feels like we're going beyond our budgetary means. -It also feels like we are short staffed for counseling services, help with students who need extra attention beyond what teachers can do and admin duties. Looking at other schools in the area, our teachers are drastically underpaid. -There is often a lack of accountability and responsibility in terms of academics with some students. I would love to see higher academic standards within the student body. -There are many areas of ambiguity in terms of discipline, consequences, respect and social expectation in the school. 4/23/2019 3:26 PM
18. Reading curriculum and intervention 4/23/2019 12:34 PM
19. An increase in diversity and supportive differentiation is a goal of BOCS. In meeting this goal BOCS would benefit from strong PBIS knowledge and strategies. 4/23/2019 12:19 PM
20. parent involvement, parent education on school traditions, a science teacher, lower grades math support, whole school community (not just individual classes) 4/23/2019 12:09 PM
21. This is an interesting Question you're proposing, I do feel that we could definitely be more diverse however our community as a whole and Chico lacks diversity. I don't see this so much as a weakness with in our school but more in our community. 4/23/2019 10:38 AM
22. 1. Lack of communication from Parent Council and Academic Council - What are they up to? What issues are being discussed. If you sent out the meeting minutes from each meeting, this would help those of us who can't make it to meetings stay aware and engaged and make us feel more a part of the Blue Oak community. Also, please send out the agenda for each meeting ahead of time so that we have the opportunity to attend and voice opinions about the matter being discussed or voted upon. 2. Bias - Blue Oak has a diverse student population and the staff/faculty are mostly white. We need implicit bias training for all staff and faculty to ensure equity at Blue Oak for all the students you serve. 3. Nurtured Heart - I heard that you did this training for all staff and faculty at one point

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- and I would recommend that this be an annual training. 4. Math and Science Prep - we want to stay at Blue Oak; however, our kiddo is showing signs of interest and advancement in math and science, and I don't see the curriculum as very challenging in these areas. An afterschool program or an advanced studies program for math and science within Blue Oak would be awesome (similar to the GATE program when we were kids). 4/23/2019 10:33 AM
23. I'm not sure I understand the question; I find the way it's worded to be confusing. In my opinion, Blue Oak's weaknesses are a lack of diversity in its student population (but Chico has that, as well), a high level of drama in the administration in years past (that seems to be dying down now), and less parent involvement than there was in years past. 4/23/2019 9:55 AM
24. Funding for afterschool programs and offerings, support for teachers in the classrooms at all grade levels, need full time or more nurse and counselor, more field areas to play-nature 4/23/2019 6:45 AM
25. involved & supportive parents and community, lack of funds, mismanagment of funds, paying for things like extra help vs. programs for children 4/23/2019 6:31 AM
26. Not enough special needs children; not enough focus on actually doing work - excuses are accepted too often. Not developing critical thinking. Students are often rude to adults and lack common curiosity 4/22/2019 10:35 PM
27. Teacher turnover rate, lack of resources for students struggling 4/22/2019 8:13 PM
28. Lack of communication between teachers so each grade has to reinvent the wheel when it comes to lesson planning. This is a lot of work on teachers and leads to vast differences in assignments in the same grade from year to year. My sons were two grades apart so I saw this for 6, 7, 8 grade. I actually gave curriculum to a teacher from my previous teacher. Fundraising causes a lot of stress and politics among parents. I felt uncomfortable in meetings and felt like I had to avoid parents over fundraising issues that I did not want to participate in. Classroom funds need to be carefully monitored so that parents do not over pay for field trips. This has happened to me more than once. Make the middle school feel more like middle school to retain/ recruit more students. None of the suggestions in the prompt are a problem. 4/22/2019 6:50 PM
29. Lack of people in the front office. I can never get help up front. Sometimes my child is marked absent when they are present and sometimes absences are not excused even when called in as sick. It's just too big of a job for one part time front desk person 4/22/2019 6:05 PM
30. Funding 4/22/2019 5:02 PM
31. not enough diversity in the school 4/22/2019 4:30 PM
32. Teacher's aides 4/22/2019 2:11 PM
33. N/A 4/22/2019 11:46 AM
34. more consistent application of nurtured heart disciplinary philosophy and more thorough

Q3 Opportunities: These are usually external, but can sometimes be internal. What opportunities can Blue Oak pursue in terms of staying aligned with the school's mission statement? What trends are you aware of? (E.g. new technology, changes in government policy, changes in social patterns, population profiles, etc.)

Answered:

34 Skipped: 0 # RESPONSES DATE

1. I'd like to see another Language opportunity, like sign language. Education on the treats of unsupervised internet access and gaming. 5/28/2019 4:16 PM
2. Make it a priority to enhance the upper grades programs relative to technology, in a manner consistent with Waldorf values. Evaluate the actual need for committing too many resources to site development, rather than staff and curriculum development. Be proactive in differentiating Blue Oak from "for-profit" charter schools. Voters are largely unaware of the differences. 5/21/2019 3:33 PM
3. This is too complicated. Too much thinking, sorry, i don't know 5/20/2019 4:31 PM
4. Utilize policies, procedures, and definitive job descriptions from existing schools, and other public Waldorf schools. 5/20/2019 1:30 PM
5. The challenge is to meet and exceed state learning standards, which Blue Oak needs to do, while incorporating the values of the Waldorf education experience. Academic goals must be met, but the goals of providing each student with an opportunity to develop skills in music, art, and movement must be met also to provide a full Waldorf experience. Another opportunity is being discussed to purchase land to build a new school. This would be a positive for Blue Oak to grow but any funding available should go to staffing up first. To me it is more important to have a top quality music teacher than to have a new school. Develop a program that really offers all that is promised by a Waldorf education and once you achieve that it would be appropriate to spend funding for land and buildings. 5/20/2019 1:12 PM
6. Maintain students by getting back to the roots of the school. Making sure teachers are receiving aid they need in the classrooms, smaller class sizes, maintaining long term teachers, having additional types of classes to offer students - ie. woodworking, science labs, sewing (not just handwork), home economics etc. 5/20/2019 12:01 PM
7. Even more hands on learning and movement. 4/28/2019 1:25 PM
8. ~ Waldorf mentors... more, please; ~ Attention to aesthetics/ beautification 4/25/2019 8:59 PM
9. would love to see an increase in awareness for other cultures in the classroom and also throughout the school. 4/25/2019 11:55 AM
10. Better opportunities in tech with new equipment. 4/25/2019 10:42 AM
11. Best practices within NGSS/CCSS Grading not on a traditional 10 scale, zero scores Credit makeup for students who don't pass ELA/Math 4/25/2019 9:17 AM
12. I feel like we are getting farther and farther away from teaching the whole child. I see children that are really discouraged and are stressed out about school. I don't see the love for learning that this school once had. There use to also be a type of magic/wonder in our classrooms. Now we are so focused on testing that children are not as engaged as previously. Also, children are so focused on talking about video games at school that they have become immune to real experiences. This is more of a societal problem. We also don't have recycling or composting or healthy food program. We need to get on the ball with the rest of the Waldorf schools that pursue these practices. 4/25/2019 7:22 AM
13. Unsure. 4/24/2019 5:56 PM
14. NA

BLUE OAK CHARTER SCHOOL STRATEGIC PLANNING FINAL REPORT

15. Ensure there is grass for the children. Ensure that children who are ready to learn are able to hear their teacher and actually receive Waldorf education- not just learn coping skills of how to ignore abusive behavior. 4/24/2019 8:57 AM
16. unknown 4/24/2019 8:43 AM
17. I would love to see more opportunities for families to get involved and just build relationships with others that don't revolve around things like festivals, which feel like a lot of commitment. More small events with less pressure might help foster tighter community. -More parent education for incoming families would be very beneficial. -More consistent fundraising events. Last year, we had an event at Monca that was successful, beautiful and fun. If that continued every year, it could be so beneficial for the school. -What would it take for our school to be a public school and receive funding like CUSD schools? Alice Birney is a public Waldorf school in Sacramento. 4/23/2019 3:26 PM
18. Training and effectively using a consistent discipline. 4/23/2019 12:34 PM
19. BOCS is doing a great job of asking questions about its existing policies or lack thereof. As BOCS continues to grow and change, pursuing further staff development in curriculum and behavior differentiation should continue to be a focus. 4/23/2019 12:19 PM
20. teaching mindfulness, actively seek guest speakers/presentations, creating opportunities for classes to work together (4th grades hosts a fundraiser that will support 5th grade) 4/23/2019 12:09 PM
21. I think one of the things I would love to see more of is encouraging or providing families with the opportunities to implement nurtured heart at home so that what is taught at school can be reflected in our home and our children have the opportunities to be healthier and happier individuals. I would also love to see more mindfulness training's for teachers and families as a whole. 4/23/2019 10:38 AM
22. 1. www.tolerance.org -Lesson plans and activities for K-12 to incorporate diverse voices in every subject. 2. Zinnedproject.org - Teaching history from the people's (and student's) perspective. Amazing lessons and resources for teaching history K-12. 3. The StoryCorps App and Storycorps.org - an interactive way to study history by conducting interviews and creating oral history stories. Great for grades 6-12. 4/23/2019 10:33 AM
23. I'm not sure. 4/23/2019 9:55 AM
24. The special needs children seem to be getting larger in number and is there enough support to keep a balance in the learning environment? Parent education opportunities seem to be less, traffic!!! 4/23/2019 6:45 AM
25. The school has pretty much taken away any programs where children can utilize their hands. The garden program which should be a large part of our curriculum is ran by a handful of dedicated parents who are not paid. Woodshop is no longer functioning etc. We only have handwork, which most boys above 4th grade are typically not interested in. Our school concerts are less than appealing. They used to be magical and now I can't get out of there fast enough. The children are hearded through as fast as possible. We are utilizing things like Measure K to fix our broken school instead of preparing for the future. We keep making the same financial mistakes by hiring people who shouldn't be managing our money in house. Our saving grace is CSMC however we don't leverage them appropriately. 4/23/2019 6:31 AM
26. Every cool thing has stopped: coding / technology; Spanish - the old teacher was better. I guess the new play structure is cool (thanks measure k) 4/22/2019 10:35 PM
27. More teacher training that effects the students they work with directly 4/22/2019 8:13 PM
28. Better fund raising or opportunity to just pay for your student instead of asking other grades to by stuff. Bring back woodworking and smaller music classes. Make the parent organization feel less cliky. Set clear policies that the staff/ teachers are aware of. Administration needs to handle the high school orientation day. 4/22/2019 6:50 PM

BLUE OAK CHARTER SCHOOL STRATEGIC PLANNING FINAL REPORT

- 29. Needs to be more structured 4/22/2019 6:05 PM
- 30. ?? 4/22/2019 5:02 PM
- 31. changes in social patterns 4/22/2019 4:30 PM
- 32. Outdoor programs, such as hikes 4/22/2019 2:11 PM
- 33. Changes in social patters. 4/22/2019 11:46 AM
- 34. need broader community support 4/22/2019 11:44 AM 7 / 9

Q4 Threats: These are usually external, but can sometimes be internal. What obstacles does Blue Oak School face that you believe might affect the alignment of the mission statement? (E.g. volatile economy, adverse government policies, insufficient after-school programs, lack of staff/faculty/administrators engagement, etc.)

Answered:

34 Skipped: 0 # RESPONSES DATE

- 1. Leadership programs and a little more of a hard stance In regards to the policy regarding media. It seems most children have cell phones and play video games regularly. My children sometimes feel like an outcast because they don't. 5/28/2019 4:16 PM
- 2. Failing to address the weaknesses and opportunities. Unwise financial decisions that have longterm effects. 5/21/2019 3:33 PM
- 3. Medical vaccine exemption laws (possibly/likely getting more challenging), judgements against the school 5/20/2019 4:31 PM
- 4. Lack of enrollment, and a stable location to set roots at. Bad publicity from past events, and not reaching out more to promote our strengths to the community. 5/20/2019 1:30 PM
- 5. A lack of staffing worries me. Blue Oak should be fully staffed with well qualified teachers and staff. We need to recover all the positions that were lost when funding was stolen. If the school uses the Nurtured Heart model to deal with children's behaviors then each teacher should be required to develop expertise in the use of Nurtured Heart process. Parents should also be given written information and instruction on how Nurtured Heart is implemented in the classroom and how they can use the Nurtured Heart technique in there home. More focus needs to be on what the children are doing right in classrooms. Over the next five years Blue Oak should continue to expand and refine the Comprehensive School Safety Plan that was developed this year. It's an active document that needs regular review and improvements. This plan should be available for parents to review in either hard copy or on line. Overall our family is very satisfied with Blue Oak and the school experience offered to our child. 5/20/2019 1:12 PM
- 6. knowledgeable & capable teachers, parents and staff involvement to co-teach the children, etc. 5/20/2019 12:01 PM
- 7. Keeping the lower grades and upper grades separated during breaks should be a priority. Front desk lacks kindness. 4/28/2019 1:25 PM
- 8. There seems to have been a lack of communication about our future, i.e. staff changes. getting information via rumors can cause a thread of darkness and lead to feelings of fear and insecurity. Since our school has been at its current site, there has been an unending sense of instability for me; ~ The person or people evaluating staff should be objective, unbiased, stable, and demonstrate a maturity level worthy of leading other adults in a respectful way (this may no longer be a threat; it may have turned in to an excellent opportunity).4/25/2019 8:59 PM
- 9. not following through with keeping teachers with a class 4/25/2019 11:55 AM
- 10. Low state test scores, turnover in teachers. 4/25/2019 10:42 AM

BLUE OAK CHARTER SCHOOL STRATEGIC PLANNING FINAL REPORT

11. Focusing on test scores above all else. Insufficient interventions/supports during/after school
Disconnect between teachers and admin, often feels teachers are an island and not checked in on/by admin 4/25/2019 9:17 AM
12. There is a lack of staff to help with behaviors in the classrooms and there is a lack of consistency for how to deal with these issues. I see teacher burnout and a lack of pay. We do a ton of work for nearly nothing compared to other teachers in our state. I feel like I have been working so hard for so long with no recognition, no fun activities, no encouragement. 4/25/2019 7:22 AM
13. Lack of training what nurtured heart means. Have seen staff use it incorrectly which means inconsistency with behavior plans. 4/24/2019 5:56 PM
14. Nepotism in work environments. 4/24/2019 11:47 AM 8 / 9
15. If administration leaves again. If the school continues NHA. If the school buys the current facility but never reaches the enrollment needed to financially sustain it. 4/24/2019 8:57 AM
16. Lack of staff and administrators in terms of employment. 4/24/2019 8:43 AM
17. There are so many more charter and home school programs available now than when the school first started. In the last few years, enrollment has been an issue. I'm wondering how much longer we will be double track and if we become single track, what will happen to our staff? -Staff turn over has been an issue, especially in the specialty program. It's extremely challenging to be a full time specialty teacher at this school. It's a huge workload, a demanding schedule, often challenging to get support from parents, difficult to deal with all the behaviour issues, etc. -Every year, there are more and more students with extreme behavior issues. Many students come to Blue Oak because they have had negative experiences and see our school as a place that will help them. In a lot of ways, we can accommodate students who need more freedom in creativity, movement, etc., but I have seen an increase in kids with severe social-emotional issues that go far beyond what our teachers are equipped to handle, especially when there are multiple high-needs students in one class. It puts so much stress on the teachers and other students in the class. We need five people like Amber and Genesee on staff all the time! But instead, there is often only one person, or no one at all to help with these students. It's becoming a greater and greater challenge for the school. 4/23/2019 3:26 PM
18. Lack of discipline. 4/23/2019 12:34 PM
19. Oversight or support for teachers often is a topic of concern at BOCS amongst staff. An engaged, educated in both waldorf and traditional education, supportive and constructive educational director could benefit staff tremendously. 4/23/2019 12:19 PM
20. we need an after school homework club in areas other than math 4/23/2019 12:09 PM
21. Here in our local community I feel that our economy is volatile as well as lack of housing because of the campfire can be a threat to The overall well-being of each person in our community and each child in our community. That being said I think that makes a really strong point that a variety of education opportunities Should be accessible to all students in our area. 4/23/2019 10:38 AM
22. 1. I received an email that the Executive Director was leaving and then I never heard anything else. Is there someone new in the position? Lack of communication is an issue here. 2. Safety always a concern. How is Blue Oak keeping our kids safe? Updates are always welcome. 4/23/2019 10:33 AM
23. Volatile economy and adverse government policies, definitely. I also think the Camp Fire may have long-lasting detrimental effects on the school, but I also think Blue Oak handled the fire very well. In my opinion, the biggest possible threat to Blue Oak would be a lessening of its adherence to Waldorf principles. 4/23/2019 9:55 AM
24. Insufficient after school programs, staffing for non academic support and support for teachers, how are we with recovery from our past scandal and threats to our charter? 4/23/2019 6:45 AM
25. WE HAVE TOO MUCH FRONT STAFF...Hire additional resources to teach our children life skills. Bring in better science programs, chemistry - robotics, etc. Teach (in a controlled atmosphere) computer

BLUE OAK CHARTER SCHOOL STRATEGIC PLANNING FINAL REPORT

skills in 2nd and 3rd grade so when they have to take state tests they know how to at least use the computer. Teachers are under paid and overwhelmed. 4/23/2019 6:31 AM

26. Bad admin. Lack of accountability. 4/22/2019 10:35 PM

27. Lack of consistently same staff, high turnover of Aides, 4/22/2019 8:13 PM

28. Administration needs to be more available. Phone system needs to work all the time. Procedures and policies need to be clear to all. My paper work has been lost/ misfiled several times in the past 4 years.

29. 4/22/2019 6:50 PM

30. Poor communication 4/22/2019 6:05 PM

31. Adverse government policies 4/22/2019 5:02 PM

32. adverse government policies volatile economy Lack of Waldorf trained teachers and administrator 4/22/2019 4:30 PM

33. Overwhelmed staff 4/22/2019 2:11 PM

34. adverse government policies and lack of staff. 4/22/2019 11:46 AM

35. too much emphasis on core testing results, more community advocacy in education forums and more evidence of actual democratic processes, Smacks a bit of clique run decisions. 4/22/2019 11:44 AM

SWOT Matrik Raw Data

Quadrant-SO:

- Parent involvement/ engagement
- Relationship Building
- Pursuing Excellence
- Explanation of Woldorff philosophy to parents community and beyond school
- More hands on learning
- Fun low commitment low cost events to incentives parents
- Inform parents student and the great community of methods and practices
- Elevator speech
- Use of technology
- Rethinking parent involvement
- Opportunities for Facility Parent Involvement

Quadrant-WO:

- Improving relationships, knowledge, honor
- Different communications platforms
- Live-stream, reach to direct community
- Task force address fundraising
- Behavior goals through the school and inform to parents

Quadrant-ST:

- Eliminate lack of understanding
- Eliminate financial instability of school
- Eliminating behavior, positive reinforcement, emphasis on virtues
- Making values more accessible to wider audience
- Strengthen relation
- Further formalized process for addressing behavior

BLUE OAK CHARTER SCHOOL STRATEGIC PLANNING FINAL REPORT

- Review and make goals from improving salaries
- Training for all teachers regardless of training levels
- Communication component of what Waldorf is to the school board
- Adverse government policy
- Requesting invitations to inform the school boards
- Supporters - extended workfi

Quadrant-WT:

- Communicating the values of the school:
- Support balance between public education and Waldorff education
- Communicating
- Strengthening peer-to-peer interactions, behaviors that come out about being and individual Interactions, services to other outlets
- Hall manators
- Clear communications about positive news
- Making notes about the board and making information more accessible
- Improve school wide communication
- Looking at where - learn about what works with
- Improving education and communication to more challenged families
- Access what is the best way to communicate with families so that we can communicate better

Blue Oak Charter Council Term Lengths

Current Council Members	August 2020	August 2021	August 2022	August 2023	August 2024	August 2025	August 2026
Monica McDaniel	Community Member #1	Community Member #1			Community Member #1		
Vicki Wonacott	Community Member #2		Community Member #2			Community Member #2	
Laurel Hill-Ward	Community Member #3			Community Member #3			Community Member #3
Laura Swanson	Community Member #4	Community Member #4			Community Member #4		
Heather Bonea/Interim	Parent Member #1	Parent Member #1			Parent Member #1		
Trisha Atehortua	Parent Member #2		Parent Member #2			Parent Member #2	
Chelsea Parker	Parent Member #3			Parent Member #3			Parent Member #3

Agenda Item: Meeting Norms

Prepared by: Alexandra Archer

Charter Council Date: 02/16/2021

Background Information:

Based on the meeting norms we verbally reviewed at the last BOCC meeting, I have written up a meeting norms guideline using our official agenda notice and language from the Brown Act. We are hoping to receive approval of these meeting norms from the Council Members in order to add this important information on the Blue Oak website.

Chelsea has also made some suggestions regarding Roberts Rule, in-person meetings, and speaker cards that she would like to share with Council members.

BOCC Meeting Norms

Agenda Notice

Any person with a disability may request the agenda be made available in an appropriate alternative format. A request for a disability-related modification or accommodation may be made by a person with a disability who requires a modification or accommodation in order to participate in the public meeting at, 450 W. East Ave., Chico, CA or by calling (530) 879-7483 between the hours of 8:00 a.m. and 4:00 p.m. Monday through Friday (at least 48 hours before the meeting). All efforts will be made for reasonable accommodations.

All times noted on the agenda are approximate and listed solely for convenience. The Board may hear items earlier or later than is noted and may move the order of agenda items.

Update: In Compliance with the Governor of California's "Safer-at-Home Order" due to COVID-19, the Blue Oak Charter Council will be conducting meetings virtually until further notice. This means there will be no specific physical meeting place; the meeting will be held remotely. Public participation continues to be welcomed and encouraged to those who join via Zoom and raise their hand. The chat bar will not be available to the public during the Zoom meetings to support the sanctity of the meeting.

Blue Oak Charter Council (BOCC) may tape, film, stream, or broadcast any open BOCC Meeting. The BOCC Chair may announce that a recording or broadcasting is being made at the direction of BOCC members and that the recording or broadcast may capture images and sounds of those attending the meeting. Any BOCC recording may be erased or destroyed 30 days after the meeting.

Participating in a Meeting

If you are member of the public who is interesting in addressing the Council you can do so in one of two ways:

Write a Letter - You can write a letter to the BOCC and submit it to the Executive Assistant, Alexandra Archer, via email at least 72 hours before the meeting. The letter will be sent to the Council Members and read aloud during the meeting. Please send your letter to **alexarcher@blueoakcharterschool.org**.

Address the Council - To address the Charter Council, you must be in attendance during the meeting. The Brown Act mandates that agendas for regular meetings allow for two types of public comment periods.

The first is a general audience comment period, which is the part of the meeting where the public can comment on any item of interest that is within the subject matter jurisdiction of the school. At Blue Oak, this period usually takes place at the beginning of the meeting and is titled

"Audience to Address the Council" on the agenda. This type of public comment period is an opportunity for members of the community to address the BOCC concerning items not on the agenda. Persons addressing the Charter Council will be allowed a maximum of three (3) minutes for their presentation. Persons may not yield their time to another speaker (Gov. Code § 54954.3). **Please Note: During this period, any comments shared by the public will not be addressed in the same meeting unless it is already a listed agenda item. If you would like to add an item to a future agenda, please see the section below.**

The second type of public comment period pertains to each specific item on the agenda during the time they are addressed by the Council. At Blue Oak, this public comment period usually takes place, per agenda item, after we have heard first from all Council Members but before their vote. The Chair may establish a maximum speaking time for any item. Persons may not yield their time to another speaker (Gov. Code § 54954.3).

Requesting an Agenda Item

If you are interested in requesting an item be added to a future BOCC agenda, please submit your request to the Executive Assistant, Alexandra Archer, via email at **alexarcher@blueoakcharterschool.org**. The item(s) will then be reviewed by the Council Chair and Executive Director; you may be contacted for more information or clarification.

Meeting Norms

- Respect each other's time - Arrive on time and avoid repeating the same comment(s) as others, if possible.
- Be present - Put away phones and other devices during the meeting and please refrain from side conversations.
- Remember your health - Take bio breaks as needed, especially during long meetings.
- Stay on topic - Everyone is responsible for helping to stay on topic. Speak up if you feel the meeting is getting off track.
- Challenge the past - Don't be afraid to question or challenge old assumptions, beliefs, expectations, or "sacred cows"; this is how we grow.
- Uphold the norms - Everyone is responsible for doing their part. Acknowledge if you notice someone is not doing so.

Agenda Item: Informal Complaint Process

Prepared by: Alexandra Archer

Charter Council Date: 02/16/2021

Background Information:

Currently in the Parent Handbook are only formal complaint procedures...

Complaint Procedures

The Uniform Complaint Form, found under Parent Resources/Forms on the website is utilised for all formal complaints. Please complete the form if there is a complaint or charge against the school site, program, office or school employee. Submit this complaint form to Blue Oak School. Call (530) 879-7483 for assistance with completing the form. The School will issue a written decision within 60 days.

The Executive Director may assign other staff or other individuals to investigate based on the nature of the complaint. The Executive Director will ensure that employees and individuals designated to investigate complaints are knowledgeable about the laws and programs for which they are responsible. Designated employees may have access to legal counsel. Staff members and individuals who may be asked to investigate complaints are: Executive Director Teacher/Faculty Support Staff Landlord Other The Executive Director will promptly notify the complainant if another employee or individual is designated to investigate the complaint.

Suggested actions to be placed in the Parent Handbook and online.

When you have a question or concern take the following steps first for resolution or understanding

- 1) Bring your concerns/questions to your classroom teacher, have a meeting to discuss
- 2) Bring your concerns/questions to admin, have a meeting to discuss
- 3) Bring your concerns/questions to the Board Chair or other board member, only after you have talked with your classroom teacher and Susan, to get a clear understanding of when/how you can speak and how your concern will be addressed. The board member will communicate with the administrator and may ask that the item be placed on the agenda for open review.
- 4) Bring it to the open session of the board
- 4) If the issue has not been resolved after steps 1-4 file a formal Uniform Complaint Form should be completed. This is linked on the Blue Oak website.



mc2design.com

February 11, 2021

Blue Oak Charter School

Messaging Recommendations

Michael Coogan
Managing Partner

Amanda Kaschmitter
Partner Relationship Manager

Objective

Simplify and clarify internal and external messaging to help Blue Oak Charter School communicate more effectively.

Deliverables:

- BrandScript
- One Liners
- Additional Messaging Recommendations



S T O R Y

B R A N D



The StoryBrand Messaging Filter



The BrandScript

Purpose

The purpose of this BrandScript is to refine your current messaging into a version that is clear and compelling. We are creating a framework based on the problem, solution and transformation thought process which can be used for marketing collateral.

Remember... *If what you are communicating about your brand isn't directly related to helping your customers survive and thrive, they aren't going to pay attention.*

Who Your Customers Are

- Parents who want their child to have a well rounded education.
- Parents of children ages 3 - 14 that are looking for a different type of education than traditional schools offer.
- Middle class families.
- **Or more simply put...**parents who care about their children's well-being.

What Does Your Customer Want?

- A well rounded, educated, and intuitive child.
- The best education for their children.
- Their child to have an appreciation for diversity.
- Their child to be seen and heard.
- More than just academic learning.
- Create a lifelong love of learning in their child.
- Sense of community.

What is Your Customer's Transformation?

From: Unsure if their child's needs are being met by the traditional school system.

To: A parent who can take comfort in knowing their child is getting an exceptional education tailored to them.

What Are Their Problems?

External

- Want a more personalized educational experience than they are currently getting.

Internal

- Disappointed
- Frustrated
- Anxious
- Nervous
- Concerned
- Ignored
- Invisible

Philosophical

- All children should get the education that they deserve.

How Do You Solve Their Problems? (Guide)

Empathy

We know what it feels like to be discouraged and dissatisfied with traditional school.

Authority

We educate through the successful implementation of proven Waldorf methodology

What is the Plan?

Here's how to make it happen:

1. Schedule a tour
2. Learn all the proven benefits of Waldorf curriculum
3. Enroll your child on a better educational path

What Does Success Look Like? What Does Failure Look Like?

- Your child's' well being will be taken into consideration.
 - A lifelong love of learning.
 - A child that is seen as an individual and learns things about themselves.
- An average education for an average life.
 - Having your child not reach their full potential.

Messaging Brandscript

At Blue Oak Charter School, we understand parents want the best education for their child – an education that meets the individual needs of the student while inspiring a lifelong love of learning. To find this, you need a school that encourages creativity, develops emotional intelligence, and fosters a sense of community. The problem is most traditional schools aren't focused on the unique learning needs of the child, taking a one-size-fits-all approach to curriculum. They simply cannot accommodate the personalized student instruction your child deserves. This leaves you feeling like a number, frustrated with the sense that your school doesn't care about you or your child. At Blue Oak, your child will experience a well-rounded approach to education through the successful implementation of proven Waldorf methodology.

Messaging Brandscript

Here's how to make it happen:

1. Schedule a tour
2. Learn all the proven benefits of Waldorf curriculum
3. Enroll your child on a better educational path

Your child isn't average. Their school shouldn't be either. It's time to rethink your student's education. Schedule a tour today!

And in the meantime, here are 10 Questions Every Parent Should Ask On School Tour.

Your child's happiness, learning, and future matter to you. And they matter to us, too. With Blue Oak, you can find the education you've hoped for and the unique instruction your child deserves.

One-Liner/Elevator Pitch

Marketing & Print Version

Most traditional schools offer a one-size-fits-all approach to curriculum, lacking consideration for the child's individual learning needs. At Blue Oak, we offer a personalized and well-rounded educational option through creative instruction using the Waldorf methodology.

Conversational Version

We're a public charter school that puts students first, using personalized and creative instruction through the Waldorf method of teaching.

Website Copy

The following is a map of your website homepage copy

Section	Copy
Heading	Heading 1: Help your child reach their true potential.
	Heading 2: A public charter school putting students first through personalized and creative Waldorf instruction.
	CTA: Schedule a Tour Today
Value Propositions	Heading: Discover a better education for your child.
	<ol style="list-style-type: none">1. Personalized Waldorf education2. Public Charter School3. Lifelong Love of Learning

Section	Copy
Stakes	Heading: Your child isn't average. Their education shouldn't be either
	As parents, you want the best education for your child – an education that meets the individual needs of the student while inspiring a lifelong love of learning. Your child's happiness, learning, and future matter to you. The problem is most traditional schools offer a one-size-fits-all approach to curriculum, lacking consideration for the child's individual learning needs. At Blue Oak, we offer a curriculum that encourages creativity, develops emotional intelligence, and fosters a sense of community. With our teaching model at Blue Oak, your child will experience a well-rounded approach to education through the successful implementation of proven Waldorf methodology.
	CTA: Schedule a Tour Today!
Authority	Heading: Serving the children of our community for over 20 years.
	<i>[Testimonials from parents and/or past students]</i>
	CTA: Schedule a Tour Today!

Section	Copy
	Heading: Here's how to make it happen:
Plan	<ol style="list-style-type: none">1. Schedule a tour2. Learn all the proven benefits of Waldorf curriculum3. Enroll your child on a better educational path
	CTA: Schedule a Tour Today

Next Steps and Recommendations

1. Create homepage wireframe with messaging
2. Compile and send final deliverable
3. Identify any next marketing needs you need

Thank you.

Agenda Item: SELPA Local Plan B and Participation Agreement

Prepared by: Alexandra Archer

Charter Council Date: 02/16/2021

Background Information:

The El Dorado Charter SELPA's revised Local Plan Section B and the revised Charter SELPA Participation Agreement were approved at the October 7, 2020, CEO Council meeting. Each partner of the Charter SELPA is required to adopt the Local Plan and the Participation Agreement for each of their respective LEAs/schools between now and February 2021. The deadline to submit the board-approved and signed Certification 5, certifying approval of the local plan, and Participation Agreement, is March 3, 2021.

LOCAL PLAN

Section B: Governance and Administration

SPECIAL EDUCATION LOCAL PLAN AREA



California Department of Education

Special Education Division

January 2020

B. Governance and Administration

California *Education Code (EC)* sections 56195 et seq. and 56205

Participating Local Educational Agencies

Participating local educational agencies (LEAs) included in the Special Education Local Plan Area (SELPA) local plan must be identified in Attachment I.

Special Education Local Plan Area—Local Plan Requirements

1. Describe the geographic service area covered by the local plan:

The El Dorado Charter SELPA is composed of local educational agency charters (LEAs) located inside and outside the geographic boundaries of El Dorado County. The El Dorado Charter SELPA has designated the El Dorado County Office of Education as the Responsible Local Agency/Administrative Unit (RLA/AU) and the County Superintendent of Schools as the Superintendent of the RLA/AU. It is the intent of the El Dorado Charter SELPA to provide options for charter schools in terms of SELPA membership. While it is always preferable for a charter school to participate with their geographic SELPA, the Charter SELPA has been developed to allow for a viable alternative for SELPA membership within the State of California.

2. Describe the SELPA regional governance and administrative structure of the local plan. Clearly define the roles and structure of a multi-LEA governing body, or single LEA administration as applicable:

Upon entry into the Charter SELPA, the governing board for each LEA charter shall approve the Agreement for Participation and the Local Plan for Special Education. The Charter SELPA Local Plan is approved by the SELPA governing board (CEO Council) with review from the County Superintendent of Schools for El Dorado County.

Amendments to the Local Plan to revise LEA membership shall be approved through the process as identified in Charter SELPA policies.

The CEO Council will hold the required public hearings and approve the Annual Service Plan and the Annual Budget Plan.

As described within the Local Plan and adopted policies of the Charter SELPA, the Boards of Education delegates the ongoing policy-making process, the Allocation Plan process, and administrative procedures for carrying out that responsibility to the governance structure of the Charter SELPA.

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3. Describe the SELPA's regional policy making process. Clearly define the roles of a multi-LEA governing body, or single LEA administration as applicable related to the policy making process for coordinating and implementing the local plan:

The Charter SELPA CEO Council membership consists of the CEO or designee of each charter LEA member. Each charter LEA member has one vote. Organization partners that operate more than one charter school, may have a single representative for all schools operated, but such representative shall have a number of votes equal to the number of charter LEAs represented.

Charter SELPA CEO Council meetings are subject to California Open Meeting laws, specifically the Brown Act (Government Code 54950-54963), which requires that CEO Council members conduct business at properly noticed and agendized public meetings.

A majority of the LEAs present at a regularly scheduled and posted CEO Council meeting shall constitute a quorum.

The Charter SELPA CEO Council will meet regularly with the El Dorado County Superintendent of Schools and/or designee to direct and supervise the implementation of the Local Plan. The Council has exclusive authority to make and take all reasonable and appropriate steps to implement all decisions which may have a material effect on any and/or all Charter SELPA policies, practices, operations, organization, services, functions, and any other purpose related to the purpose for which the Charter SELPA is established. A minimum of two meetings per year will be held.

The Charter SELPA CEO Council is responsible to approve Charter SELPA policies and administrative regulations.

The Charter SELPA CEO Council is responsible to approve the Allocation Plan, which is the framework for distribution of funds within the Charter SELPA.

Material changes to the Local Plan, other than for membership changes, shall be approved by the Charter SELPA CEO Council and reviewed by the El Dorado County Superintendent of Schools.

4. Clearly define the roles of the County Office of Education (COE) as applicable, and/or any other administrative supports necessary to coordinate and implement the local plan:

The El Dorado Charter SELPA has designated the El Dorado County Office of Education as the Responsible Local Agency/Administrative Unit (RLA/AU) and the County Superintendent of Schools as the Superintendent of the RLA/AU. The Charter SELPA administrative unit coordinates and implements the local plan under the supervision of the County Superintendent

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of Schools.

5. Describe the policies and procedures of the SELPA that allow for the participation of charter schools in the local plan:

Per CEO Council Policy 22, any charter school may apply to the Charter SELPA to become an LEA member of the SELPA. The Charter SELPA will establish an annual timeline for submission of applications. Once granted membership, the charter LEA will participate in the governance of the SELPA in the same manner as all other charter LEA members in the SELPA. The timeline for submission may be amended by the Charter SELPA RLA/AU Superintendent/designee for unique circumstances, including State Board of Education charter approvals. The applicant, not an expansion of an existing member, will be deemed a member of the SELPA upon approval of the Charter SELPA Selection Committee. The applicant charter LEA board must also take action to approve membership. The Charter SELPA Selection Committee will inform the CEO Council members of their decision. Applications for additional schools of a current Charter SELPA member, shall be approved by the Charter SELPA RLA/AU Designee, pursuant to AR 22, and are not required to be reviewed by the Charter SELPA Selection Committee. Because they are current members, the Charter SELPA RLA/AU Designee has significant documentation available to assess the new charter LEA capacity. The applicant member, an expansion of an existing member, will be deemed a member of the SELPA after approval by the Charter SELPA RLA/AU Designee. The applicant member charter LEA board must also take action to approve membership.

6. Identify and describe the representation and participation of the SELPA community advisory committee (CAC) pursuant to EC Section 56190 in the development of the local plan:

The Community Advisory Committee shall be composed of parents of individuals with exceptional needs, enrolled in public or private schools, parents of other pupils enrolled in school, pupils and adults with disabilities, regular education teachers, special education teachers and other school personnel, representatives of other public and private agencies, and persons concerned with the needs of individuals with exceptional needs. Terms of CAC participation are outlined in the CAC bylaws.

Because of the geographic diversity within the El Dorado Charter SELPA, meetings may take place through teleconference. For purposes of this section, "teleconference" means a meeting where the members are in different locations, connected by electronic means, through either audio, video, or both.

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7. Describe the SELPA's process for regular consultations regarding the plan development with representative of special education and regular education teachers, and administrators selected by the groups they represent and parent members of the CAC:

The purpose of the Community Advisory Committee shall be to act in support of individuals with exceptional needs by representing broad interests in the community and promoting maximum interaction of parents and community members with the the LEA charter schools in accordance with the Education Code and the El Dorado Charter Local Plan. Per the CAC bylaws, the Community Advisory Committee may be composed of parents of individuals with exceptional needs, enrolled in public or private schools, parents of other pupils enrolled in school, pupils and adults with disabilities, regular education teachers, special education teachers and other school personnel, representatives of other public and private agencies, and persons concerned with the needs of individuals with exceptional needs pursuant to EC Section 56193. Through the regularly scheduled CAC meetings, the SELPA will ensure that the development, amendment, and review of the Local Plan pursuant to EC sections 56205(a)(12)(E) and 56194. The CAC will be given at least 30 days to conduct a review. The SELPA shall review and consider comments from the CAC pursuant to EC section 56205(b)(7).

8. Identify and describe the responsible local agency (RLA), Administrative Unit (AU), or other agency who is responsible for performing tasks such as the receipt and distribution of funds, provision of administrative support, and coordination and implementation of the plan:

The El Dorado Charter SELPA has designated the El Dorado County Office of Education as the Responsible Local Agency/Administrative Unit (RLA/AU) and the County Superintendent of Schools as the Superintendent of the RLA/AU. The Superintendent oversees the SELPA administrative staff in the receipt and distribution of funds, provision of administrative support, and the coordination and implementation of the SELPA Allocation and Local Plans.

9. Describe the contractual agreements and the SELPA's system for determining the responsibility of participating agency for the education of each student with special needs residing within the geographical area served by the plan:

As members of the El Dorado Charter Special Education Local Plan Area (SELPA), each charter (as identified by the CDS (County, District, School) code issued by the State Board of Education) is considered an LEA (Local Education Agency) for purposes of special education. Each charter school, as their own LEA for special education accountability is responsible for the students within their jurisdiction including any and all contractual agreements. There are no additional contractual agreements that supersede education code.

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10. For multi-LEA local plans, specify:

- a. The responsibilities of each participating COE and LEA governing board in the policymaking process:

The Charter SELPA CEO Council membership consists of the CEO or designee of each charter LEA member. Each charter LEA member has one vote. Organization partners that operate more than one charter school may have a single representative for all schools operated, but such representative shall have a number of votes equal to the number of charter LEAs represented.

Charter SELPA CEO Council meetings are subject to California Open Meeting laws, specifically, the Brown Act (Government Code 54950-54963), which requires that CEO Council members conduct business at properly noticed and agendized public meetings.

A majority of the LEAs present at a regularly scheduled and posted CEO Council meeting shall constitute a quorum.

The Charter SELPA CEO Council will meet regularly with the El Dorado County Superintendent of Schools and/or designee to direct and supervise the implementation of the Local Plan. The Council has exclusive authority to make and take all reasonable and appropriate steps to implement all decisions which may have a material effect on any and/or all Charter SELPA policies, practices, operations, organization, services, functions, and any other purpose related to the purpose for which the Charter SELPA is established. A minimum of two meetings per year will be held.

The Charter SELPA CEO Council is responsible for approving Charter SELPA policies and administrative regulations.

The Charter SELPA CEO Council is responsible for approving the Allocation Plan, which is the framework for distribution of funds within the Charter SELPA.

- b. The responsibilities of the superintendents of each participating LEA and COE in the implementation of the local plan:

The El Dorado Charter SELPA has designated the El Dorado County Office of Education as the Responsible Local Agency/Administrative Unit (RLA/AU) and the County Superintendent of Schools as the Superintendent of the RLA/AU. The Charter SELPA administrative unit coordinates and implements the local plan under the supervision of the County Superintendent of Schools. Each LEA CEO representative is responsible per the SELPA Participation Agreement for the review and implementation of the local plan.

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- c. The responsibilities of each LEA and COE for coordinating the administration of the local plan:

Upon entry into the Charter SELPA, the governing board for each LEA charter shall approve the Agreement for Participation and the Local Plan for Special Education. The Charter SELPA Local Plan is approved by the CEO Council and reviewed by the El Dorado County Superintendent of Schools. Each Charter LEA and the COE as the RLA/AU is responsible for the coordination of the administration of the local plan. Adopted policies of the Charter SELPA, the LEAs Boards of Education delegates the ongoing policy-making process, the Allocation Plan process, and administrative procedures for carrying out that responsibility to the governance structure of the Charter SELPA.

11. Identify the respective roles of the RLA/AU, the SELPA administrator, and the individual LEAs associated with the SELPA related to:

- a. The hiring, supervision, evaluation, and discipline of the SELPA administrator and staff employed by the AU in support of the local plan:

The El Dorado County Office of Education Superintendent of Schools, as the RLA/AU, is responsible for the hiring, supervision, evaluation, and discipline of the SELPA administrator and staff employed by the RLA/AU.

- b. The local method used to distribute federal and state funds to the SELPA RLA/AU and to LEAs within the SELPA:

Funds received by the El Dorado Charter SELPA from Part B of the IDEA shall be expended in accordance with the applicable provisions of the IDEA and shall be used to supplement, and not to supplant State, local and other Federal funds.

State and federal funds received by the RLA/AU and El Dorado Charter SELPA are allocated and distributed among the local educational agencies in the SELPA, according to the El Dorado Charter SELPA adopted Allocation Plan.

- c. The operation of special education programs: education programs:

The Charter LEA shall ensure that the individualized education program team for any student with a disability includes the following members:

1. One or both of the student's parents/guardians, and/or a representative selected by the parent/guardian.
2. If the student is or may be participating in the regular education program, at least one regular education teacher. If more than one regular education teacher is providing instructional services to the student, the Charter LEA may designate one such teacher to represent the others.

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3. At least one special education teacher or, where appropriate, at least one special education provider working with the student
4. A representative of the Charter LEA who is:
 - a. Qualified to provide or supervise the provision of specially designed instruction to meet the unique needs of students with disabilities.
 - b. Knowledgeable about the general education curriculum.
 - c. Knowledgeable about the availability of Charter LEA and/or special education local plan area (SELPA) resources.
 - d. Has the authority to commit Charter LEA resources and ensure that whatever services are set out in the IEP will be provided.
5. An individual who can interpret the instructional implications of assessment results This individual may already be a member of the team as described in items 2-4 above or in item 6 below.
 Note: Pursuant to Education Code 56341 and 34 CFR 300.321, the determination as to whether an individual identified in item 6 below has "knowledge or special expertise" must be made by the party (either the Charter LEA or parent) who invited the individual to the IEP team meeting.
6. At the discretion of the parent/guardian or Charter LEA, other individuals who have knowledge or special expertise regarding the student, including related services personnel, as appropriate (The determination of whether the individual has knowledge or special expertise regarding the student shall be made by the party who invites the individual to be a member of the IEP team. (Ed. Code § 56341)
7. Whenever appropriate, the student with a disability
8. For transition service participants:
 - a. The student, of any age, with a disability if the purpose of the meeting is the consideration of the student's postsecondary goals and the transition services needed to assist the student in reaching those goals. If the student does not attend the IEP team meeting, the Charter LEA shall take other steps to ensure that the student's preferences and interests are considered.
 - b. To the extent appropriate, and with the consent of the parent/guardian, a representative of any other agency that is likely to be responsible for providing or paying for transition services.
 - c. If a representative of a local agency has been invited but does not attend the meeting, the Charter LEA shall take steps to obtain participation of the agency in the planning of any transition services. (Ed. Code § 56341)
9. For students suspected of having a specific learning disability at least one individual who is qualified to conduct individual diagnostic examinations of the student, such as a school psychologist, speech language pathologist, or remedial reading teacher. In addition, at least one team member other than the student's regular education teacher shall observe the student's academic performance in the regular classroom setting. If the student is younger than five years or not enrolled in school, a team member shall observe the child in an environment appropriate for a child of that age. 34 CFR §§ 300.308, 300.542; Ed Code § 56341);
10. For students who have been placed in a group home by the juvenile court, a representative of the group home
11. If a student with a disability is identified as potentially requiring mental health services, the Charter LEA may request the participation of the county mental health program in the IEP team

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meeting. (Ed. Code § 56331)

(20 USC § 1414(d)(1); 34 CFR § 300.321; Ed. Code §§ 56341, 56341.2, 56341.5)

Excusal of Team Member

A member of the IEP team shall not be required to attend an IEP team meeting, in whole or in part, if the parent/guardian consents and the Charter LEA agrees, in writing, that the attendance of the member is not necessary because the member's area of the curriculum or related services is not being modified or discussed at the meeting. If the meeting involves a discussion of the member's area of the curriculum or related service, the IEP team member may be excused from the meeting if the parent/guardian consents in writing to the excusal and the member submits to the parent/guardian and team written input into the development of the IEP prior to the meeting. (20 USC § 1414(d)(1)(C); 34 CFR § 300.321; Ed. Code 56341)

Parent/Guardian Participation and Other Rights

The Charter CEO or designee shall take steps to ensure that one or both of the parents/guardians of the student with a disability are present at each IEP team meeting or are afforded the opportunity to participate. These steps shall include, at minimum, notifying the parents/guardians of the meeting early enough to ensure that they will have the opportunity to attend and scheduling the meeting at a mutually agreed upon time and place. (34 CFR § 300.322; Ed. Code 56341.5)

The Charter CEO or designee shall send parents/guardians a notice of the IEP team meeting that:

1. Indicate the purpose, time, and location of the meeting
2. Indicate who will be in attendance at the meeting
3. For students beginning at age 16 (or younger than 16 if deemed appropriate by the IEP team):
 - a. Indicate that the purpose of the meeting will be the consideration of postsecondary goals and transition services for the student as required by 20 USC, section 1414(d)(1)(A)(i)(VIII), 34 CFR, section 300.320(b), and Education Code, section 56345.1
 - b. Indicate that the Charter LEA will invite the student to the IEP team meeting
 - c. Identify any other agency that will be invited to send a representative

At each IEP team meeting convened by the Charter LEA, the Charter LEA administrator or specialist on the team shall provide the parent/guardian and student of the federal and state procedural safeguards (Ed. Code § 56321, 56500.1)

Before any IEP meeting, the parent/guardian shall have the right and opportunity to request to examine all of his/her child's school records. Upon receipt of an oral or written request, the Charter LEA shall provide complete copies of the records within five business days. (Ed. Code § 56043)

If neither parent/guardian can attend the meeting, the Charter CEO or designee shall use other methods to ensure parent/guardian participation, including video conferences or individual or conference telephone calls. (20 USC 1414(f); 34 CFR 300.322; Education Code 56341.5)

An IEP team meeting may be conducted without a parent/guardian in attendance if the Charter LEA is unable to convince the parent/guardian that he/she should attend. In such a case, the Charter LEA shall maintain a record of its attempts to arrange a mutually agreed upon time and place for the meeting, including, but not limited to: (34 CFR § 300.322; Ed. Code § 56341.5)

1. Detailed records of telephone calls made or attempted and the results of those calls

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2. Copies of correspondence sent to the parent/guardian and any responses received
3. Detailed records of visits made to the parent/guardian's home or place of employment and the results of those visits. Parents/guardians and the Charter LEA shall have the right to audiotape the proceedings of IEP team meetings, provided members of the IEP team are notified of this intent at least 24 hours before the meeting. If the Charter LEA gives notice of intent to audiotape a meeting and the parent/guardian objects or refuses to attend because the meeting would be audiotaped, the meeting shall not be audiotaped. Audiotape recordings made by a LEA, SELPA, or county office are subject to the federal Family Educational Rights and Privacy Act (20 USC § 1232g).

Parents/guardians have the right to:

1. Inspect and review the audiotapes
2. Request that the audiotapes be amended if the parents/guardians believe they contain information that is inaccurate, misleading, or in violation of the student's privacy rights or other rights
3. Challenge, in a hearing, information that the parents/guardians believe is inaccurate, misleading, or in violation of the student's privacy rights or other rights
(Education Code 56341.1)

The Charter LEA shall take any action necessary to ensure that the parents/guardians understand the proceedings of the meeting, including arranging for an interpreter for parents/guardians with deafness or whose native language is not English. (34 CFR 300.322; Education Code 56345.1)

The Charter LEA shall provide the parents/guardians of a student with disabilities a copy of his/her child's IEP at no cost. (34 CFR 300.322).

The Charter LEA shall adhere to all Federal (IDEA) and State (Education Code) laws regarding the provision of special education programs and services for students that qualify for special education per the IEP process outlined above.

- d. Monitoring the appropriate use of federal, state, and local funds allocated for special education programs:

The El Dorado County Office of Education is the Responsible Local Agency/Administrative Unit (RLA/AU) for the Charter SELPA. Pursuant to the provisions of Education Code Section 56030 et seq., the RLA/AU shall receive and distribute regionalized service funds, provide administrative support and coordinate the implementation of the El Dorado Charter Local Plan for Special Education and the CEO Council approved Allocation Plan. The RLA/AU shall perform such services and functions required to accomplish the goals set forth in the plans, including development of the Annual Service and Budget Plans.

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12. Describe how specialized equipment and services will be distributed within the SELPA in a manner that minimizes the necessity to serve students in isolated sites and maximizes the opportunities to serve students in the least restrictive environments:

Specialized equipment and services is provided at the school site associated with the Charter LEA, where the Individualized Education Program (IEP) team has determined is the most appropriate free and appropriate public education in the least restrictive environment.

Policies, Procedures, and Programs

Pursuant to *EC* sections 56122 and 56205(a), the SELPA ensures conformity with Title 20 *United States Code (USC)* and in accordance with Title 34 *Code of Federal Regulations (CFR)* Section 300.201 and has in effect policies, procedures, and programs. For each of the following 23 areas, identify whether, or not each of the following provisions of law are adopted as stated. If the policy is not adopted as stated, briefly describe the SELPA's policy for the given area. In all cases, provide the SELPA policy and procedure numbers; the document title; and the physical location where the policy can be found.

1. Free Appropriate Public Education: 20 USC Section 1412(a)(1)

Policy/Procedure Number: Document Title: Document Location:

"It shall be the policy of this LEA that a free appropriate public education is available to all children with disabilities residing in the LEA between the ages of 3 and 21, inclusive, including children with disabilities who have been suspended or expelled from school." The policy is adopted by the SELPA as stated:

☒ Yes ☐ No

2. Full Educational Opportunity: 20 USC Section 1412(a)(2)

Policy/Procedure Number: Document Title: Document Location:

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"It shall be the policy of this LEA that all children with disabilities have access to educational programs, non-academic programs, and services available to non-disabled children." The policy is adopted by the SELPA as stated:

☒ Yes ☐ No

3. Child Find: 20 USC Section 1412(a)(3)

Policy/Procedure Number:

Document Title:

Document Location:

"It shall be the policy of this LEA that all children with disabilities residing in the State, including children with disabilities who are homeless or are wards of the State and children with disabilities attending private schools, regardless of the severity of their disabilities, who are in need of special education and related services, are identified, located, and evaluated. A practical method has been developed and implemented to determine which children with disabilities are currently receiving needed special education and related services." The policy is adopted by the SELPA as stated:

☐ Yes ☒ No

If "NO," provide a brief description of the SELPA's policy related to the provision of law:

The Governing Board of each member LEA recognizes the need to actively seek out and evaluate school age Charter LEA residents who have disabilities, in order to provide them with appropriate educational opportunities in accordance with state and federal law.

Charter schools are currently authorized to serve school-aged students (grades K-12). If at any time the authorization changes, the charter schools would follow all state and federal laws regarding children from age 0-2 and Child Find. Charter schools will assist families and make appropriate referrals for any students they find who would be outside the age or area of responsibility of the Charter schools.

The Charter Chief Executive Officer or designee shall follow SELPA procedures to determine when an individual is eligible for special education services and shall implement the SELPA procedures for special education program identification, screening, referral, assessment, planning, implementation, review, and triennial assessment. (Education Code 56301) The Charter LEAs' process shall prevent the inappropriate disproportionate representation by race and ethnicity of students with disabilities.

In addition to identifying students with disabilities residing in their district, each districts "Child Find" identification system shall identify highly mobile children with disabilities, such as migrant

SELPA Fiscal Year **4. Individualized Education Program (IEP) and Individualized Family Service Plan (IFSP):
20 USC Section 1412(a)(4)**Policy/Procedure Number: Document Title: Document Location:

"It shall be the policy of this LEA that an IEP, or an IFSP that meets the requirements of 20 USC Section 1436 (d), is developed, implemented, reviewed, and revised for each child with a disability who requires special education and related services in accordance with 20 USC Section 1414 (d). It shall be the policy of this LEA that a of an IEP will be conducted on at least an annual basis to review a student's progress and make appropriate revisions." The policy is adopted by the SELPA as stated:

☐ Yes ☒ No

If "NO," provide a brief description of the SELPA's policy related to the provision of law:

The Governing Board of each participating LEA shall provide educational alternatives that afford students with disabilities full educational opportunities. Students with disabilities shall receive a FAPE in the least restrictive environment as required by law.

The Charter Chief Executive Officer or designee shall implement the SELPA Procedural Guide. The Procedural Guide outlines the composition of the IEP team, and sets forth procedures regarding the development, review, and revision of the IEP.

The specifics of the IEP process are set out in CEO Administrative Regulation 3

5. Least Restrictive Environment: USC Section 1412(a)(5)Policy/Procedure Number: Document Title: Document Location:

"It shall be the policy of this LEA that to the maximum extent appropriate, children with disabilities, including children in public or private institutions or other care facilities, are educated with children who are not disabled. Special classes, separate schooling, or other removal of children with disabilities from the general educational environment, occurs only when the nature or severity of the disability of a child is such that education in regular classes with the use of supplementary aids and

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services cannot be achieved satisfactorily." The policy is adopted by the SELPA as stated:

☒ Yes ☐ No

6. Procedural Safeguards: 20 USC Section 1412(a)(6)

Policy/Procedure Number:

Document Title:

Document Location:

"It shall be the policy of this LEA that children with disabilities and their parents shall be afforded all procedural safeguards according to state and federal laws and regulations." The policy is adopted by the SELPA as stated:

☐ Yes ☒ No

If "NO," provide a brief description of the SELPA's policy related to the provision of law:

In order to protect the rights of students with disabilities, the Charter LEA shall follow all procedural safeguards as required by law. Parents/guardians shall receive written notice of their rights in accordance with law, Board policy, and administrative regulation.

Note: Education Code 56195.8 authorizes the policy to include provisions for involving Charter LEA Board members in any due process hearing procedure activities.

7. Evaluation: 20 USC Section 1412(a)(7)

Policy/Procedure Number:

Document Title:

Document Location:

"It shall be the policy of this LEA that a reassessment of a child with a disability shall be conducted at least once every three years or more frequently, if appropriate." The policy is adopted by the SELPA as stated:

☐ Yes ☒ No

If "NO," provide a brief description of the SELPA's policy related to the provision of law:

The Charter CEO or designee shall ensure that the IEP team:

1. Reviews the IEP periodically, but at least annually, to determine whether the annual goals for the student are being achieved and the appropriateness of placement

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2. Revises the IEP, as appropriate, to address:

- a. Any lack of expected progress toward the annual goals and in the general curriculum, where appropriate
- b. The results of any reassessment conducted pursuant to Education Code 56381
- c. Information about the student provided to or by the parents/guardians regarding review of evaluation data (34 CFR 305(a)(2) and Education Code 56381(b).)
- d. The student's anticipated needs
- e. Any other relevant matters

8. Confidentiality: 20 USC Section 1412(a)(8)

Policy/Procedure Number:

Document Title:

Document Location:

"It shall be the policy of this LEA that the confidentiality of personally identifiable data, information, and records maintained by the LEA relating to children with disabilities and their parents and families shall be protected pursuant to the Family Educational Rights and Privacy Act, non-academic programs, and services available to non-disabled children." The policy is adopted by the SELPA as stated:

☐ Yes ☒ No

If "NO," provide a brief description of the SELPA's policy related to the provision of law:

The Charter LEA Governing Board recognizes the importance of keeping accurate, comprehensive student records as required by law. Procedures for maintaining the confidentiality of student records shall be consistent with state and federal law.

The Charter CEO or designee shall establish regulations governing the identification, description and security of student records, as well as timely access for authorized persons. These regulations shall ensure parental rights to review, inspect and copy student records. In addition, the regulations will ensure and shall protect the privacy rights of student and the student's family.

The Charter CEO or designee shall designate a certificated employee to serve as custodian of records for student records at the Charter LEA level. At each school, the principal or a certificated designee shall act as custodian of records for students enrolled at that school. The custodian of records shall be responsible for implementing Board policy and administrative regulation regarding student records. (5 CCR § 431)

9. Part C to Part B Transition: 20 USC Section 1412(a)(9)

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Document Location:

"It shall be the policy of this LEA that children participating in early intervention programs under the Individuals with Disabilities Education Act (IDEA), Part C, and who will participate in preschool programs, experience a smooth and effective transition to preschool programs in a manner consistent with 20 *USC* Section 1437(a)(9). The transition process shall begin prior to the child's third birthday."The policy is adopted by the SELPA as stated:

☐ Yes ☒ No

If "NO," provide a brief description of the SELPA's policy related to the provision of law:

Charter schools in the El Dorado Charter SELPA currently do not serve students in Part C or preschool students. If students are transitioning from preschool to a Charter LEA and are eligible for Part B services, the Charter LEA will participate to ensure a smooth and effective transition between programs.

10. Private Schools: 20 *USC* Section 1412(a)(10)

Policy/Procedure Number:

Document Title:

Document Location:

"It shall be the policy of this LEA to assure that children with disabilities voluntarily enrolled by their parents in private schools shall receive appropriate special education and related services pursuant to LEA coordinated procedures. The proportionate amount of federal funds will be allocated for the purpose of providing special education services to children with disabilities voluntarily enrolled in private school by their parents." The policy is adopted by the SELPA as stated:

☒ Yes ☐ No

11. Local Compliance Assurances: 20 *USC* Section 1412(a)(11)

Policy/Procedure Number:

Document Title:

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"It shall be the policy of this LEA that the local plan shall be adopted by the appropriate local board(s) (district/county) and is the basis for the operation and administration of special education programs, and that the agency(ies) herein represented will meet all applicable requirements of state and federal laws and regulations, including compliance with the IDEA; the Federal Rehabilitation Act of 1973, Section 504 of Public Law; and the provisions of the California *EC*, Part 30." The policy is adopted by the SELPA as stated:

☒ Yes ☐ No

12. Interagency: 20 USC Section 1412(a)(12)

Policy/Procedure Number:

Document Title:

Document Location:

"It shall be the policy of this LEA that interagency agreements or other mechanisms for interagency coordination are in effect to ensure services required for free appropriate public education are provided, including the continuation of services during an interagency dispute resolution process." The policy is adopted by the SELPA as stated:

☒ Yes ☐ No

13. Governance: 20 USC Section 1412(a)(13)

Policy/Procedure Number:

Document Title:

Document Location:

"It shall be the policy of this LEA to support and comply with the provisions of the governance bodies and any necessary administrative support to implement the local plan. A final determination that an LEA is not eligible for assistance under this part will not be made without first affording that LEA with reasonable notice and an opportunity for a hearing through the State Education Agency." The policy is adopted by the SELPA as stated:

☐ Yes ☒ No

If "NO," provide a brief description of the SELPA's policy related to the provision of law:

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14. Personnel Qualifications

Policy/Procedure Number:

Document Title:

Document Location:

"It shall be the policy of this LEA to ensure that personnel providing special education related services are appropriately and adequately prepared and trained, and that those personnel have the content knowledge and skills to serve children with disabilities. This policy shall not be construed to create a right of action on behalf of an individual student for the failure of a particular LEA staff person to be highly qualified or to prevent a parent from filing a State complaint with the California Department of Education (CDE) about staff qualifications." The policy is adopted by the SELPA as stated:

☒ Yes ☐ No

15. Performance Goals and Indicators: 20 USC Section 1412(a)(15)

Policy/Procedure Number:

Document Title:

Document Location:

"It shall be the policy of this LEA to comply with the requirements of the performance goals and indicators developed by the CDE and provide data as required by the CDE." The policy is adopted by the SELPA as stated:

☒ Yes ☐ No

16. Participation in Assessments: 20 USC Section 1412(a)(16)

Policy/Procedure Number:

Document Title:

Document Location:

"It shall be the policy of this LEA that all students with disabilities shall participate in state and district-wide assessment programs described in 20 USC Subsection 6311. The IEP team determines how a student will access assessments with or without accommodations, or access alternate assessments where necessary and as indicated in their respective Reps.." The policy is adopted by the SELPA as

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stated:

☒ Yes ☐ No

17. Supplementation of State, Local, and Federal Funds: 20 USC Section 1412(a)(17)

Policy/Procedure Number:

Document Title:

Document Location:

"It shall be the policy of this LEA to provide assurances that funds received from Part B of the IDEA will be expended in accordance with the applicable provisions of the IDEA, and will be used to supplement and not to supplant state, local, and other federal funds." The policy is adopted by the SELPA as stated:

☒ Yes ☐ No

18. Maintenance of Effort: 20 USC Section 1412(a)(18)

Policy/Procedure Number:

Document Title:

Document Location:

"It shall be the policy of this LEA that federal funds will not be used to reduce the level of local funds and/or combined level of local and state funds expended for the education of children with disabilities except as provided in federal laws and regulations." The policy is adopted by the SELPA as stated:

☒ Yes ☐ No

19. Public Participation: 20 USC Section 1412(a)(19)

Policy/Procedure Number:

Policy/Procedure Title:

Document Location:

"It shall be the policy of this LEA that public hearings, adequate notice of the hearings, and an opportunity for comments are available to the general public, including individuals with disabilities and parents of children with disabilities, and are held prior to the adoption of any policies and/or regulations needed to

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comply with Part B of the IDEA." The policy is adopted by the SELPA as stated:

☒ Yes ☐ No

20. Suspension and Expulsion: 20 USC Section 1412(a)(22)

Policy/Procedure Number:

Document Title:

Document Location:

"The LEA assures that data on suspension and expulsion rates will be provided in a manner prescribed by the CDE. When indicated by data analysis, the LEA further assures that policies, procedures, and practices related to the development and implementation of the IEPs will be revised." The policy is adopted by the SELPA as stated:

☒ Yes ☐ No

21. Access to Instructional Materials: 20 USC Section 1412(a)(23)

Policy/Procedure Number:

Document Title:

Document Location:

"It shall be the policy of this LEA to provide instructional materials to blind students or other students with print disabilities in a timely manner according to the state-adopted National Instructional Materials Accessibility Standard." The policy is adopted by the SELPA as stated:

☒ Yes ☐ No

22. Over-identification and Disproportionality: 20 USC Section 1412(a)(24)

Policy/Procedure Number:

Document Title:

Document Location:

"It shall be the policy of this LEA to prevent the inappropriate over-identification or disproportionate representation by race and ethnicity of children as children with disabilities." The policy is adopted by the SELPA as stated:

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☒ Yes ☐ No

23. Prohibition on Mandatory Medicine: 20 USC Section 1412(a)(25)

Policy/Procedure Number:

Document Title:

Document Location:

"It shall be the policy of this LEA to prohibit school personnel from requiring a student to obtain a prescription for a substance covered by the Controlled Substances Act as a condition of attending school or receiving a special education assessment and/or services." The policy is adopted by the SELPA as stated:

☒ Yes ☐ No

Administration of Regionalized Operations and Services

Pursuant to *EC* sections 56195.7(c), 56205(a)(12)(B), 56368, and 56836.23, describe the regionalized operation and service functions. Descriptions must include an explanation of the direct instructional support provided by program specialists; and the respective roles of the RLA/AU, the SELPA administrator, and the individual LEAs associated with the SELPA. Information provided should include the reference number, document title, and the location (e.g., SELPA office) for each function:

1. Coordination of the SELPA and the implementation of the local plan:

Reference Number:

Document Title:

Document Location:

As members of the El Dorado County Charter Special Education Local Plan Area (SELPA), (hereinafter referred to as Charter SELPA), each charter (as identified by the CDS (County, District, School) code issued by the State Board of Education) is considered an LEA (Local Education Agency) for purposes of special education.

The Charter SELPA further recognizes its' members as single charter partners or organization partners. Single Charter Partner is defined as an entity with one charter CDS code. An Organization Partner is an entity with multiple charters (CDS codes) as members of the Charter

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SELPA. An entity is defined as an organization with one governing board or one CEO (Chief Executive Officer) position. The title of CEO may differ by organization, but the intent is that final decision making in the organization is vested in one leadership position.

As members of the Charter SELPA, each Charter SELPA LEA (Local Education Agency) desires to provide a free and appropriate public education (FAPE) to all school aged K-12 individuals with disabilities, who are enrolled in the charter, including children who have been suspended or expelled or placed by the charter LEA in a nonpublic school or agency services. The SELPA will provide technical support to any Charter LEAs identified as the DOR for students age 18 to 21 who are incarcerated in a county jail and remaining eligible for special education to assist in meeting their obligation. The SELPA may facilitate collaboration with the county jails as requested.

Students shall be referred for special education instruction and services only after the resources of the regular education program have been considered and, where appropriate, utilized. (Education Code 56303)

In order to meet the needs of individuals with disabilities and employ staff with adequate expertise for this purpose, the charter LEA participates as a member of the Special Education Local Plan Area (SELPA).

The Charter SELPA Local Plan is approved by the Charter CEO Council and reviewed by the El Dorado County Superintendent of Schools. Amendments to the Local Plan to revise LEA membership (additions) shall be approved by the Charter SELPA Selection Committee. Prior to Selection Committee approval, new LEA members shall be approved through the selection process as identified in Policy 22 and AR 22. Termination of membership shall be approved through the termination process as identified in Policy 26 or Policy 27. All membership changes shall be communicated with the Charter SELPA CEO Council at the next regularly scheduled meeting.

The Charter CEO Council will hold the required public hearings and approve the Annual Service Plan and the Annual Budget Plan. Notice of the public hearings shall be posted as required by law.

Upon entry into the Charter SELPA, the Governing Board for each LEA charter shall approve the Charter SELPA Local Plan and the Agreement for Participation.

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Material changes to the Local Plan, other than for membership changes, shall be approved by the Charter SELPA CEO Council and reviewed by the El Dorado County Superintendent of Schools.

The Charter Chief Executive Officer or designee of the charter LEA shall extend the charter LEA's full cooperation to the SELPA. The policies and procedures of the Charter SELPA shall be applied as policies and regulations to all participating charter LEAs.

Charter SELPA policies and administrative regulations are approved by the Charter SELPA CEO Council.

The Charter SELPA shall administer a local plan and administer the allocation of funds. (Education Code 56195). The Charter SELPA CEO Council shall approve all allocation plan decisions that impact the allocation of funds.

2. Coordinated system of identification and assessment:

Reference Number:

CEO Administrative Regulation 2 and Procedural Guide

Document Title:

Identification and Evaluation of Individuals for Special Education

Document Location:

<https://charterselpa.org/governance/>
<http://charterselpa.org/program-support/procedural-guide/>

A student shall be referred for special educational instruction and services only after the resources of the regular education program have been considered and used where appropriate. (Education Code 56303) The Charter LEAs shall not determine that a student is eligible for special education if the dominant factor for finding eligibility is lack of appropriate instruction in reading, lack of instruction in mathematics, or limited English Proficiency (20 U.S.C. § 1414(b)(5); Ed. Code, § 56329, subd. (a)(2).) All referrals for special education and related services from school staff shall include a brief reason for the referral and description of the regular program resources that were considered and/or modified for use with the student, and their effect. (5 CCR § 3021.) Within 15 days of a referral for initial assessment the LEA shall provide student's parent/guardian with a notice of parental rights and a written proposed assessment plan. The 15-day period does not include days between the student's regular school session or term, or days of school vacation in excess of five school days from the date of receipt of the referral. The proposed assessment plan shall meet all of the following requirements: (Education Code 56321) 1. Be in a language easily

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understood by the general public 2. Be provided in the native language of the parent/guardian or other mode of communication used by the parent/guardian unless it is clearly not feasible 3. Explain the types of assessment to be conducted 4. State that no individualized education program (IEP) will result from the assessment without parent/guardian consent Upon receiving the proposed assessment plan, the parent/guardian shall have at least 15 days to decide whether or not to consent to the initial assessment. The assessment may begin as soon as informed parental consent is received by the respective Charter LEAs. The Charter LEAs shall not interpret parent/guardian consent for initial assessment as consent for initial placement or initial provision of special education services. (Education Code 56321; 34 CFR 300.505) However, an individualized education program required as a result of an assessment of a pupil shall be developed within 30 days after the commencement of the subsequent regular school year as determined by each Charter LEA's school calendar for each pupil for whom a referral has been made 30 days or less prior to the end of the regular school year. In the case of pupil school vacations, the 60-day time shall recommence on the date that pupil schooldays reconvene. A meeting to develop an initial individualized education program for the pupil shall be conducted within 30 days of a determination that the pupil needs special education and related services pursuant to paragraph (2) of subsection (b) of Section 300.343 of Title 34 of the Code of Federal Regulations. (Education Code 56344) If a parent/guardian refuses to consent to the initial evaluation or failed to respond to the request to provide consent, the Charter LEAs may pursue an evaluation by utilizing the mediation and due process procedures found at 20 USC § 1415 and in accordance with Education Code, sections 56501, subd. (a) (3), and 56506, subd. (e). See BP/AR 6159.1 - Procedural Safeguards and Complaints for Special Education) In the event that authorized parent does not consent to an initial evaluation the Charter LEAs shall not be considered in violation of the requirement to provide FAPE. In addition, the Charter LEAs is not required to convene an IEP team meeting or to develop an IEP for that child. (20 USC § 1414(a)(1).) Informed parental consent means that the parent/guardian: 1. Has been fully informed of all information relevant to the activity for which consent is sought, in his/her native language or other mode of communication 2. Understands and agrees, in writing, to the assessment 3. Understands that the granting of consent is voluntary on his/her part and may be revoked at any time (34 CFR § 300.500) If the student is a ward of the state and is not residing with his/her parents/guardians, the Charter LEAs shall make reasonable efforts to obtain informed consent from the parent/guardian as defined in 20 USC, section 1401 for an initial evaluation to determine whether the student is a student with a disability. (20 USC §

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1414(a)(1)) The Charter LEAs shall not be required to obtain informed consent from the parent/guardian of a student for an initial evaluation to determine whether the student is a student with a disability if any of the following situations exists 1. Despite reasonable efforts to do so, the Charter LEAs cannot discover the whereabouts of the parent/guardian of the student. 2. The rights of the parent/guardian of the student have been terminated in accordance with California law. 3. The rights of the parent/guardian to make educational decisions have been subrogated by a judge in accordance with California law and consent for an initial evaluation has been given by an individual appointed by the judge to represent the student. (Education Code 56301; 20 USC 1414(a)(1)) As part of the assessment plan, the parent/guardian shall receive written notice that: 1. Upon completion of the administration of tests and other assessment materials, an IEP team meeting that includes the parent/guardian or his/her representative shall be scheduled pursuant to Education Code, section 56341. At this meeting, the team shall determine whether or not the student is a student with disabilities as defined in Education Code, section 56026 and shall discuss the assessment, the educational recommendations, and the reasons for these recommendations. A copy of the assessment report and the documentation of determination of eligibility shall be given to the parent/guardian. 2. If the parent/guardian disagrees with an assessment obtained by the Charter LEAs, the parent/guardian has the right to obtain, at public expense, an independent educational assessment of the student from qualified specialists, in accordance with 34 CFR §300.502. If the Charter LEAs observed the student in conducting its assessment, or if its assessment procedures make it permissible to have in-class observation of a student, an equivalent opportunity shall apply to the independent educational assessment. This equivalent opportunity shall apply to the student's current placement and setting as well as observation of the Charter LEA's proposed placement and setting, regardless of whether the independent educational assessment is initiated before or after the filing of a due process hearing proceeding. 3. The Charter LEAs may initiate a due process hearing pursuant to Education Code 56500- 56508 to show that its assessment is appropriate. If the final decision resulting from the due process hearing is that the assessment is appropriate, the parent/guardian maintains the right for an independent educational assessment but not at public expense. If the parent/guardian obtains an independent educational assessment at private expense, the results of the assessment shall be considered by the Charter LEAs with respect to the provision of a free appropriate public education to the student, and may be presented as evidence at a due process hearing regarding the student. If the Charter LEAs observed the student in conducting its assessment, or if its

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assessment procedures make it permissible to have in-class observation of a student, an equivalent opportunity shall apply to an independent educational assessment of the student in the student's current educational placement and setting, if any, proposed by the Charter LEAs, regardless of whether the independent educational assessment is initiated before or after the filing of a due process hearing. 4. If a parent/guardian proposes a publicly financed placement of the student in a nonpublic school, the Charter LEAs shall have an opportunity to observe the proposed placement and, if the student has already been unilaterally placed in the nonpublic school by the parent/guardian, the student in the proposed placement. Any such observation shall only be of the student who is the subject of the observation and may not include the observation or assessment of any other student in the proposed placement unless that student's parent/guardian consents to the observation or assessment. The results of any observation or assessment of another student in violation of Education Code, section 56329(d) shall be inadmissible in any due process or judicial proceeding regarding the free appropriate public education of that other student. (Education Code 56329; 34 CFR 300.502) An IEP required as a result of an assessment shall be developed within a total time not to exceed 60 days from the date of the receipt of the parent/guardian's consent for assessment, unless the parent/guardian agrees to an extension in writing. The 60-day period does not include any days between the student's regular school sessions/terms, or days of school vacation in excess of five school days. (Ed Code § 56043)

However, when a referral is made within 30 days of the end of the regular school year, an IEP required as a result of an assessment shall be developed within 30 days after the commencement of the subsequent regular school year as determined by each district's school calendar. In the case of school vacations, the 60-day time shall recommence on the date that school reconvenes. (Ed. Code § 56344 (a).) A meeting to develop an initial IEP for the pupil shall be conducted within 30 days of a determination that the pupil needs special education and related services. (Ed. Code §§ 56043(f)(2); 56344 (a).)

Before entering kindergarten or first grade, children with disabilities who are in a preschool program shall be reassessed to determine if they still need special education and services. The IEP teams shall identify a means of monitoring the continued success of children who are determined to be eligible for less intensive special education programs to ensure that gains made are not lost by a rapid removal of individualized programs and supports for these individuals. (Ed. Code § 56445)

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3. Coordinated system of procedural safeguards:

Reference Number: CEO Administrative Regulation 4 and Procedural GuideDocument Title: Procedural Safeguards and Complaints for Special EducationDocument Location: <https://charterselpa.org/governance/>
<http://charterselpa.org/program-support/procedural-guide/>

Under California law, due process hearings pursuant to the IDEA (20 USC 1400-et seq) are held only at the state level. Related rights and procedures for due process are set forth in Education Code §§ 56501 et. Seq. and 5 CCR §§ 3080 et. seq. When California law provides greater protections to students and parents, it supersedes federal law. Due process hearing rights extend to the student only if he/she is an emancipated student or a ward or dependent of the court with no available parent or surrogate parent. (Ed. Code § 56501; see AR 6159.3 - Appointment of Surrogate Parent for Special Education Students.)

Informal ADR Process/Pre-Hearing Mediation Conference Before requesting a due process hearing, the Charter Chief Executive Officer or designee of the Charter LEA and a parent/guardian may agree to meet informally to resolve any dispute relating to the identification, assessment or education and placement of a student with disabilities. The Charter Chief Executive Officer or designee shall have the authority to resolve the dispute through an informal alternative dispute resolution (“ADR”) process. (Ed. Code § 56502) In addition, either party may file a request with the Superintendent of Public Instruction for a Pre- Hearing Mediation Conference (commonly referred to as “mediation only”) to be conducted by a person designated by the California Department of Education. Based on the Pre-Hearing Mediation Conference, the Charter Chief Executive Officer or designee may resolve the issue(s) in any manner that is consistent with state and federal law, and is to the satisfaction of both parties. (Education Code 56500.3) Attorneys may not attend the Informal ADR session or the Prehearing Mediation Conference. Attorneys may attend, or otherwise participate in, only those mediation conferences that are scheduled pursuant to a request for a due process hearing. (Ed. Code §§ 56500.3, 56501) If the parties do not resolve their dispute through Informal ADR and/or a Pre-Hearing Mediation Conference, either party may file a request for a due process hearing. Due Process Complaint Notice and Hearing Procedures Due process hearing procedures may be initiated by a parent/guardian, the Charter LEA, and/or a student who is emancipated or a ward or dependent of the court, under the following circumstances. 1. There is a

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proposal to initiate or change the identification, assessment or educational placement of the student or the provision of a free, appropriate public education to the student 2. There is a refusal to initiate or change the identification, assessment or educational placement of the student or the provision of a free, appropriate public education to the student 3. The parent/guardian refuses to consent to an assessment of his/her child; and/ or 4. There is a disagreement between a parent/guardian and the Charter LEA regarding the availability of a program appropriate for the student, including the question of financial responsibility. (20 USC § 1415(b); Education Code 56501) Prior to initiating a due process hearing, the party requesting the hearing, or the party's attorney, must provide the opposing party a confidential due process complaint notice, specifying: 1. The student's name 2. The student's address or, in the case of a student identified as homeless pursuant to the McKinney-Vento Homeless Assistance Act (42 USC 11434a(2)), any available contact information for that student 3. The name of the school the student attends 4. A description of the nature of the student's problem relating to the proposed or refused initiation or change, including facts relating to the problem 5. A proposed resolution to the problem to the extent known and available to the complaining party at the time (20 USC § 1415(b); 34 CFR § 300.508 (b).) Resolution Session When a parent seeks to initiate a request for due process, before their request is filed, they must provide the Charter LEA with the opportunity to resolve the matter by convening a resolution session, which is a meeting between the parents and the relevant members of the IEP team who have specific knowledge of the facts identified in the due process hearing request. (20 USC § 1415[f][1][B]; 34 CFR § 300.510) The Charter LEA has fifteen (15) days from the date it received the parents' due process hearing request to convene the resolution session. The sessions shall include a representative of the LEA who has decision-making authority and not include an attorney of the school LEA unless the parent is accompanied by an attorney. The parent of the child may discuss the due process hearing issue and the facts that form the basis of the due process hearing request. The resolution session is not required if the parent and the Charter LEA agree in writing to waive the meeting. If the Charter LEA has not resolved the due process hearing issue within thirty (30) days, the due process hearing may occur. If a resolution is reached, the parties shall execute a legally binding agreement. (20 USC § 1415[f][1][B]; 34 CFR § 300.51) A due process complaint must be filed within two years of the date that the parent/guardian or Charter LEA knew or should have known about the situation that forms the basis of the complaint. Response to the Due Process Hearing Request If the Charter LEA has not sent a prior written notice to the parent/guardian regarding

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the subject matter contained in the parent/guardian's due process complaint notice, the Charter LEA shall send a response to the parent/guardian within 10 days of receipt of the complaint specifying: 1. An explanation of why the Charter LEA proposed or refused to take the action raised in the complaint 2. A description of other options that the individualized education program (IEP) team considered and the reasons that those options were rejected 3. A description of each evaluation procedure, assessment, record, or report the Charter LEA used as the basis for the proposed or refused action 4. A description of the factors that are relevant to the Charter LEA's proposal or refusal (20 USC 1415(c)(1)) If the Charter LEA sent prior written notice to the parent/guardian regarding the subject matter of the parent/guardian's due process complaint, the Charter LEA may, within 10 days of receipt, send a response specifically addressing the issues in the complaint. (20 USC § 1415(c)(1)) Parties requesting a due process hearing shall file their request with the Superintendent of Public Instruction or designated contracted agency and give a copy of the request, at the same time, to the other party. (Ed. Code § 56502) Prior Written Notice The Charter Chief Executive Officer or designee shall send to parents/guardians of any student with a disability a prior written notice within a reasonable time before: 1. The Charter LEA initially refers the student for assessment 2. The Charter LEA proposes to initiate or change the student's identification, evaluation, educational placement or the provision of a free, appropriate public education 3. The Charter LEA refuses to initiate or change the identification, evaluation or educational placement of the student or the provision of a free and appropriate public education 4. The student graduates from high school with a regular diploma (Ed. Code §§ 56500.4, 56500.5; 20 USC § 1415(c); 34 CFR § 300.503) The prior written notice shall include: 1. A description of the action proposed or refused by the Charter LEA 2. An explanation as to why the Charter LEA proposes or refuses to take the action 3. A description of any other options that the IEP team considered and why those options were rejected 4. A description of each evaluation procedure, test, record or report the Charter LEA used as a basis for the proposed or refused action 5. A description of any other factors relevant to the Charter LEA's proposal or refusal 6. A statement that the parents/guardians of the student have protection under procedural safeguards and, if this notice is not an initial referral for evaluation, the means by which a copy of the description of procedural safeguards can be obtained 7. Any resources for parents/guardians to obtain assistance in understanding these provisions (20 USC § 1415(c); 34 CFR § 300.503) Students with disabilities and their parents/guardians shall be provided written notice of their rights in language easily understood by the general public and in the primary language of the parent/guardian or

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other mode of communication used by the parent/guardian, unless to do so is clearly not feasible. The notice shall include, but not be limited to, those rights set forth in Education Code, section 56341. (Ed. Code §§ 56341, 56506; 34 CFR § 300.503) If the native language or other mode of communication of the parent/guardian is not a written language, the Charter LEA shall take steps to ensure that: 1. The notice is translated orally or by other means to the parent/guardian in his/her native language or other mode of communication 2. The parent/guardian understands the contents of the notice 3. There is written evidence that items #1 and #2 have been satisfied (34 CFR § 300.503) Notice of Procedural Safeguards A notice of procedural safeguards shall be made available to parents/guardians of students with a disability once a year and upon: 1. Initial referral for evaluation 2. Each notification of an IEP meeting 3. Reevaluation of the student 4. Registration of a complaint 5. Filing for a pre-hearing mediation conference or a due process hearing (Ed. Code § 56301; 20 USC 1415(d)(1)) The notice of procedural safeguards shall include information on the procedures for requesting an informal meeting, pre-hearing mediation conference, mediation conference, or due process hearing; the timelines for completing each process; whether the process is optional; the type of representative who may be invited to participate; and the right of the parent/guardian and/or the Charter LEA to electronically record the proceedings of IEP meetings in accordance with Education Code 56341. A copy of this notice shall be attached to the student's assessment plan and referred to at each IEP meeting. (20 USC 1415(d)(2); Ed. Code §§ 56321, 56321.5) In addition, the notice of procedural safeguards shall include a full explanation of the procedural safeguards relating to independent educational evaluation; prior written notice; parental consent; access to educational records; opportunity to present complaints to initiate due process hearings; the student's placement while due process proceedings are pending; procedures for students who are subject to placement in an interim alternative educational setting; requirements for unilateral placement by parent/guardians of students in private schools at public expense.(20 USC 1415(d)(2); 34 CFR 300.504)

4. Coordinated system of staff development and parent and guardian education:

Reference Number:

CEO Policy 21 and CAC Bylaws

Document Title:

Reading Literacy

Document Location:

https://charterselpa.org/governance/

In order to improve the educational results for students with disabilities,

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Description:

the Charter LEAs in the El Dorado Charter SELPA ensure that all students who require special education will participate in the California Reading Initiative, just as do all other students in the El Dorado Charter LEAs. In order to facilitate that effort, the Charter LEAs assure that special education instructional personnel will participate in staff development inservice opportunities in the area of literacy, including: a. information about current literacy and learning research; b. state-adopted student content standards and frameworks; and c. research-based instructional strategies for teaching reading to a wide range of diverse learners Each of the Charter LEAs will include special education staff in their curriculum materials selection process, in order to support alignment with State standards. Each will also include all special education staff in all staff development on phonemics and phonics, as well as in any additional state or regional training based on new legislation, e.g., the California Reading and Literature Subject Matter Project, the rollouts on the frameworks, AB466 training. The goals of the Charter LEAs are to increase the participation of students with disabilities in statewide student assessments, to increase the percentage of children with disabilities who are literate, and to assure that students with disabilities attain higher standards in reading. In order to reach these goals, we assure that students with disabilities will have full access to: 1. all required core curriculum including state-adopted core curriculum textbooks and supplementary textbooks; and 2. instructional materials and support.

5. Coordinated system of curriculum development and alignment with the core curriculum:

Reference Number:

Charter SELPA Procedural Guide and CEO Policy 21
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Document Title:

Curriculum Adaptations/Reading Literacy

Document Location:

https://charterselpa.org/governance/ http://charterselpa.org/program-support/procedural-guide/
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Description:

Curriculum adaptations include accommodations, modifications, and supports that allow a child with a disability access to the general curriculum and assessments. LEAs/districts are responsible for ensuring that each teacher and provider is informed of his or her specific responsibilities related to implementing the child's IEP and the specific accommodations, modifications, and supports that must be provided for the child in accordance with the IEP (34CFR 300.342 (b)(3)).
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6. Coordinated system internal program review, evaluation of the effectiveness of the local plan, and implementation of the local plan accountability system:

Reference Number: CEO Policy 28Document Title: Oversight PolicyDocument Location: <https://charterselpa.org/governance/>

The Charter SELPA is responsible for monitoring all required areas of compliance with federal, state and Charter SELPA policies. The purpose of all monitoring and oversight activities is to ensure legal and effective LEA practices are in place to meet the needs of students with disabilities. This policy outlines areas of oversight and indicators that may cause the initiation of a Charter SELPA review process. Charter SELPA administration will keep the CEO Council informed of SELPA oversight activities and determinations.

If compliance, performance and/or student population data for an LEA in the Charter SELPA varies significantly from expected results or standards, it may be an early warning for the Charter SELPA to initiate contact. In this case, the Charter SELPA will contact the LEA to confirm the data, discuss any underlying issues which may impact the data, and identify how the Charter SELPA can assist the LEA in any necessary corrective action.

The Charter SELPA will monitor special education practices and data continuously to determine whether practices are in line with the LEA's responsibilities to students with disabilities and SELPA policies. Data will be collected and reviewed by the Charter SELPA. Examples of existing indicators and standards include but are not limited to:

- Identification rate of special education students that is below 4% or greater than 14%
- State Performance Plan Indicators
- Significant swings in enrollment and/or enrollment trends that are not aligned to the LEA's instructional calendar
- Pattern of compliance complaints or due process hearings
- Evidence of exclusionary practices
- Significant and/or abrupt change in leadership or staff
- No/low participation or engagement in the Charter SELPA (CEO Council, Steering Committee, professional development offerings, etc.)
- Unspent funds greater than 25%
- Annual independent audit which shows serious fiscal solvency issues

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Description:

or material findings (e.g. findings related to internal control or program compliance, high debt ratios, deficit spending, going concern findings, adequate reserves, and adequate cash)

SELPA REVIEW PROCESS

If one or more of the preceding triggers indicates a potential problem, the Charter SELPA may initiate a program and/or fiscal review. Program and fiscal reviews are facilitated by the appropriate Charter SELPA administrator. Charter SELPA's goal in each review process is to clearly identify the areas of SELPA concern, discuss any underlying issues which may be impacting the findings, and identify how the Charter SELPA can assist the LEA in any necessary corrective action. The Charter SELPA may request additional information as necessary to resolve identified concerns.

When multiple or connected concerns exist, the Charter SELPA may implement an Integrated Review Team (IRT) visit. An Integrated Review Team (IRT) visit consists of Charter SELPA program and business administrators meeting directly with the charter LEA leadership team.

CHARTER SCHOOLS AT-RISK

Whether through a Charter SELPA review process or other source, or if significant matters arise that are potentially harmful to students, demonstrate negligence, may harm the SELPA, or there is a concern that funds are not being spent appropriately for special education, Charter SELPA administration is empowered to act in the best interests of the SELPA as a whole. Such matters include, but are not limited to:

- Pattern of noncompliance with federal, state or Charter SELPA regulations
- Notice of revocation
- Notice of bankruptcy
- FCMAT extraordinary audit
- Annual audit with material findings and identification of operational issues that cause concern regarding the long-term viability of the organization
- Other circumstances that create a concern that a loss to the SELPA is possible or funds are not being spent appropriately for special education

Charter SELPA administration may make a determination and proceed to:

- Notify appropriate public agencies;
- Notify the LEA's governing board;
- Withhold state and/or federal funding;
- Move an LEA to reimbursement-based state funding, requiring

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expenditure reporting prior to cash distribution;
• Require an LEA to submit proof of actual expenditures; and/or
• Initiate termination of membership pursuant to CEO Policy 26.

7. Coordinated system of data collection and management:

Reference Number: CEO Policy 20

Document Title: Data

Document Location: <https://charterselpa.org/governance/>

Description: The El Dorado Charter SELPA and its member LEAs shall provide data or information to the SELPA and the California Department of Education as required by regulations.

8. Coordination of interagency agreements:

Reference Number: CEO Administrative Regulation 29

Document Title: Interagency

Document Location: <https://charterselpa.org/governance/>

Pursuant to Title 17 of the California Code of Regulations (17 CCR) Section 52140, LEAs must develop and maintain local interagency agreements with Regional Centers. Agreements must include (as applicable to charter LEAs):

1. The responsibilities of each LEA and Regional Center in meeting the terms of the agreement;
2. Procedures for coordination of child find activities with local public agencies and Regional Centers to identify infants and toddlers who may be eligible for early intervention services;
3. Specific procedures for coordination of referrals for evaluation and assessment;
4. Procedures for the assignment of a service coordinator;
5. Interagency procedures for identifying the responsibilities of the regional center and LEA for completing the evaluation and assessment and determining eligibility within the time requirements contained in Section 52086 of these regulations, when an infant or toddler may receive services from both the Regional Center and LEA;
6. Procedures for the timely exchange of information between Regional Centers and LEAs;
7. Mechanisms for ensuring the availability of contacts at Regional

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Description:

Centers and LEAs at all times during the year;
8. Procedures for interagency individualized family service plan (IFSP) development when infants and toddlers may be eligible for early intervention services from the Regional Center and the LEA or other state or local programs or services;
9. Procedures to ensure the provision of services during periods of school vacations when services are required on the IFSP;
10. Transition planning procedures which begin at least six months prior to a toddler's third birthday pursuant to EC Section 52112 of these regulations;
11. Procedures for resolving disputes between regional centers and LEAs;
12. Procedures for the training and assignment of surrogate parents; and
13. Procedures for accepting transfers of infants or toddlers with existing IFSPs.
Local interagency agreements must be dated and signed by representatives of the Regional Center and LEA. Interagency agreements must be reviewed by both parties annually, revised as necessary, dated, and signed by both parties as needed.

9. Coordination of services to medical facilities:

Reference Number:

CEO Administrative Regulation 1

Document Title:

Comprehensive Local Plan for Special Education

Document Location:

<https://charterselpa.org/governance/>

Description:

The SELPA Administrator, or designee, will facilitate the coordination of these services by the designated LEAs and provide technical assistance to the medical facilities and LEAs as appropriate. Role of the individual LEAs: Each individual LEA is responsible for students with disabilities who are placed in a public hospital, state licensed children's hospital, psychiatric hospital, proprietary hospital, or a health facility for medical purposes when the hospital or facility is located within their boundaries, unless based on education code there is another district of special education accountability which would be responsible.

10. Coordination of services to licensed children's institutions and foster family homes:

Reference Number:

CEO Administrative Regulation 3

Document Title:

Individualized Education Program

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Document Location:

Description:

When the Charter LEA has placed a foster student in a nonpublic, nonsectarian school, the Charter LEA must conduct an annual evaluation, as specified below. In addition, the nonpublic, nonsectarian school to report to the Charter LEA regarding the educational progress made by the student. (Ed. Code § 56157.) If a student with disabilities residing in a licensed children's institution or foster family home has been placed by the Charter LEA in a nonpublic, nonsectarian school, the Charter LEA shall conduct an annual evaluation as part of the IEP process of whether the placement is the least restrictive environment that is appropriate to meet the student's needs. (Education Code 56157)

11. Preparation and transmission of required special education local plan area reports:

Reference Number:

Document Title:

Document Location:

Description:

The LEAs will annually compile, and submit to the SELPA, budget and expenditure information that meets CDE MOE reporting requirements. The SELPA will then conduct the two required calculations determining MOE for the SELPA as a whole, and for each LEA. The SELPA-wide data is compiled and submitted in the format required by CDE.

12. Fiscal and logistical support of the CAC:

Reference Number:

Document Title:

Document Location:

Description:

The Community Advisory Committee shall be composed of parents of individuals with exceptional needs, enrolled in public or private schools, parents of other pupils enrolled in school, pupils and adults with disabilities, regular education teachers, special education teachers and other school personnel, representatives of other public and private agencies, and persons concerned with the needs of individuals with exceptional needs. Terms of CAC participation are outlined in the CAC bylaws.
Because of the geographic diversity within the El Dorado Charter

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SELPA, meetings may take place through teleconference. For purposes of this section, "teleconference" means a meeting where the members are in different locations, connected by electronic means, through either audio, video, or both.

13. Coordination of transportation services for individuals with exceptional needs:

Reference Number: El Dorado Charter SELPA Procedural Guide

Document Title: Special Education Transportation

Document Location: <http://charterselpa.org/program-support/procedural-guide/>

Description:

Legal Requirements Regarding Special Education Transportation
Education Code Section 56040(a) states: "Every individual with exceptional needs, who is eligible to receive special education instruction and related services under this part, shall receive that instruction and those services at no cost to his or her parents or, as appropriate, to him or her." Related services means transportation and such developmental, corrective, and other supportive services as are required to assist a child with a disability to benefit from special education [34 CFR 300.34(a)]. Transportation as a related service includes travel to and from school and between schools, travel in and around school buildings; and specialized equipment (such as special or adapted buses, lifts, and ramps), if required to provide special transportation for a child with a disability [34 CFR 300.34(c)(16i-iii)]. LEAs/districts should not automatically assign students to transportation based on the students' disability without considering the students' individual needs and the continuum of placements [Hopkinton (MA) Pub. Schs., 108 LRP 41626 (OCR 2007)].
For students with medical needs, 34 CFR 300.34(a)(ii) limits the responsibility of a public agency to appropriately monitor and maintain medical devices that are needed to maintain the health and safety of the child, including breathing, nutrition, or operation of other bodily functions, while the child is transported to and from school.

14. Coordination of career and vocational education and transition services:

Reference Number: CEO Administrative Regulation 1 and Procedural Guide

Document Title: Comprehensive Local Plan for Special Education

Document Location: <https://charterselpa.org/governance/>
<http://charterselpa.org/program-support/procedural-guide/>

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Description:

Special education may include each of the following if the services otherwise meet the definition in the above paragraph: (Education Code 56031) 1. Speech language pathology services, or any other designated instruction and service or related service, pursuant to Education Code 56363, if the service is considered special education rather than designated instruction and service or related service under state standards 2. Travel training 3. Career technical education 4. Transition services for students with disabilities in accordance with 34 CFR 300.43 if provided as specially designed instruction, or a related service, if required to assist a student with disabilities to benefit from special education. Specially designed instruction means adapting, as appropriate to the needs of an eligible student, the content, methodology, or delivery of instruction to ensure access of the student to the general curriculum, so that the student can meet the educational standards that apply to all students in the charter LEA. (34 CFR 300.39(b)(3))

15. Assurance of full educational opportunity:

Reference Number:

Document Title:

Document Location:

Description:

Full educational opportunities means that students with disabilities have the right to full educational opportunities to meet their unique needs, including access to a variety of educational programs and services available to non-disabled students. The State must have in effect policies and procedures to demonstrate that the State has established a goal of providing full educational opportunity to all children with disabilities and a detailed timetable for accomplishing that goal. (34 CFR 300.109)

16. Fiscal administration and the allocation of state and federal funds pursuant to *EC* Section 56836.01—The SELPA Administrator's responsibility for the fiscal administration of the annual budget plan; the allocation of state and federal funds; and the reporting and accounting of special education funding.

Reference Number:

Document Title:

Document Location:

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Description:

The El Dorado County Office of Education is the Responsible Local Agency/Administrative Unit (RLA/AU) for the Charter SELPA. Pursuant to the provisions of Education Code 56030 et seq., the RLA/AU shall receive and distribute regionalized service funds, provide administrative support and coordinate the implementation of the El Dorado Charter Local Plan for Special Education. The RLA/AU shall perform such services and functions required to accomplish the goals set forth in the plan, including development of the Annual Service and Budget Plan. In addition, pursuant to Education Code 56836.01(a)(b)(c) the SELPA RLA/AU will oversee the fiscal administration of the Annual Budget Plan and the allocation of state and federal funds allocated to the special education local plan area for the provision of special education and related services by those entities, in accordance with the Local and Allocation Plans approved by the CEO Council, and be responsible for the reporting and accounting requirements prescribed by this part.

17. Direct instructional program support that maybe provided by program specialists in accordance with *EC* Section 56368:

Reference Number:

CEO Administrative Regulation 10

Document Title:

Personnel Qualifications

Document Location:

<https://charterselpa.org/governance/>

Description:

A program specialist is a specialist who holds a valid special education credential, clinical services credential, health services credential, or a school psychologist authorization and has advanced training and related experience in the education of individuals with exceptional needs and a specialized in-depth knowledge in preschool disabilities, career vocational development, or one or more areas of major disabling conditions.

(b) A program specialist may do all the following:

- (1) Observe, consult with, and assist resource specialists, designated instruction and services instructors, and special class teachers.
- (2) Plan programs, coordinate curricular resources, and evaluate effectiveness of programs for individuals with exceptional needs.
- (3) Participate in each school's staff development, program development, and innovation of special methods and approaches.
- (4) Provide coordination, consultation and program development primarily in one specialized area or areas of his or her expertise.
- (5) Be responsible for assuring that pupils have full educational opportunity regardless of the district of residence.

(c) For purposes of Section 41403, a program specialist shall be

SELPA Fiscal Year **Special Education Local Plan Area Services**

1. A description of programs for early childhood special education from birth through five years of age:

Reference Number:	CEO Policy 6
Document Title:	Part C-Transition
Document Location:	https://charterselpa.org/governance/
Description:	Charter schools in the El Dorado Charter SELPA currently do not serve students in Part C or preschool students. If students are transitioning from preschool to a Charter LEA and are eligible for Part B services, the Charter LEA will participate to ensure a smooth and effective transition between programs.

2. A description of the method by which members of the public, including parents or guardians of individuals with exceptional needs who are receiving services under the local plan, may address questions or concerns to the SELPA governing body or individual administrator:

Reference Number:	CEO Policy 15
Document Title:	Public Participation
Document Location:	https://charterselpa.org/governance/
Description:	It shall be the policy of the Charter SELPA that public hearings, adequate notice of the hearings, and an opportunity for comment available to the general public, including individuals with disabilities and parents of children with disabilities, are held prior to the adoption of any policies and/or regulations needed to comply with part B of the IDEA. Per the Charter SELPA Local Plan, policies are adopted by the Charter CEO Council. The Charter SELPA RLA/AU may request input from the Executive Committee as policies are developed. Appropriate notice shall be provided prior to adoption of policies by the Charter SELPA CEO Council. Proposed policies will be posted to the El Dorado Charter SELPA website. This will allow for review and comment by the public, parents of children with disabilities, or individuals with disabilities. Charter CEO Council typically meets twice per year and meetings may take place through teleconference. For the purposes of this section, "teleconference" means a meeting where the members are in different

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3. A description of a dispute resolution process, including mediation and final and binding arbitration to resolve disputes over the distribution of funding, the responsibility for service provision, and the other governance activities specified within the local plan:

Reference Number:

Document Title:

Document Location:

Description:

4. A description of the process being used to ensure a student is referred for special education instruction and services only after the resources of the regular education program have been considered and, where appropriate, utilized:

Reference Number:

Document Title:

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Document Location:

<https://charterselpa.org/governance/>
<http://charterselpa.org/program-support/procedural-guide/>

Description:

The Charter Chief Executive Officer or designee shall follow SELPA procedures providing that parents/guardians, teachers, appropriate professionals, and others may refer an individual for assessment for special education services. Identification procedures shall be coordinated with school site procedures for referral of students with needs that cannot be met with modifications to the regular instructional program. (Ed. Code § 56302)

5. A description of the process being used to oversee and evaluate placements in nonpublic, nonsectarian schools and the method of ensuring that all requirements of each student's individualized education program are being met. The description shall include a method for evaluating whether the student is making appropriate educational progress:

Reference Number:

CEO Administrative Regulation 24 and Procedural Guide

Document Title:

Nonpublic, Nonsectarian School and Agency Services for Special Education

Document Location:

<https://charterselpa.org/governance/>
<http://charterselpa.org/program-support/procedural-guide/>

Description:

Contracts with an NPS or NPA shall include an Individual Services Agreement ("ISA") negotiated for each student. ISAs shall be for the length of time for which NPS and/or NPA services are specified in the student's individualized education program ("IEP"), but not to exceed one year. Changes in educational instruction, services or placement shall be made only on the basis of revisions to the student's IEP. (Ed. Code § 56366.) The master contract shall specify the general administrative and financial agreements between the NPS or NPA and the Charter LEA to provide the special education and designated instruction and services, as well as transportation specified in the student's IEP. The administrative provisions of the master contract shall also include procedures for record keeping and documentation, and the maintenance of school records by the contracting charter LEA to ensure that the NPS provides appropriate high school graduation credit to the student. The contract may allow for partial or full-time attendance at the nonpublic nonsectarian school. (Ed. Code § 56366.) In order for a Charter LEA to contract with an NPS or NPA, the NPS and NPA must be certified as meeting state standards. (Ed Code § 56366.) A master contract may be terminated for cause with 20-days' notice. However, the availability of a public education program initiate during the period of the

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master contract cannot give cause for termination unless the parent/guardian agrees to transfer the student to the public program. The master contract shall include a description of the process being utilized by the Charter LEA to oversee and evaluate placements in the NPS. This description shall include a method for evaluating whether the student is making appropriate educational progress. (Ed. Code 56366) The Charter CEO or designee of an elementary Charter LEA shall notify a high school district of all students placed in NPS or NPA programs prior to the annual review of the IEP for each student who may transfer to the high school district. (5 CCR § 3069.) When a special education student meets the district requirements for completion of prescribed course of study as designated in the student's IEP, the district which developed the IEP shall award the diploma. (5 CCR § 3070.)

6. A description of the process by which the SELPA will fulfill the obligations to provide free and appropriate public education (FAPE) to a student age 18 to 21 (or age 22 under the circumstances described in *EC 56026(c)(4)*) who has been incarcerated in a county jail and remains eligible for special education services:

The obligation to make FAPE available extends to those otherwise-eligible adults in county jail, age 18 to 21, who: (a) had been identified as a child with a disability and had received services in accordance with an IEP, but left school prior to their incarceration; or (b) did not have an IEP in their last educational setting, but had actually been identified as a child with a disability. (*EC Section 56040*)

It is the responsibility of the district of residence (DOR) to provide special education services and related services to an adult student in county jail who remains eligible for these services and wishes to receive them. The DOR is the district in which the student's parents resided when the student turned 18, unless and until the parents move to a new DOR. For conserved students, the DOR is based on the residence of the conservator. (*EC Section 56041*)

Reference Number:

CEO Policy 1 and Procedural Guide

Document Title:

Comprehensive Local Plan for Special Education

Document Location:

<https://charterselpa.org/governance/>
<http://charterselpa.org/program-support/procedural-guide/>

Description:

As members of the Charter SELPA, each Charter SELPA LEA (Local Education Agency) desires to provide a free and appropriate public education (FAPE) to all school aged K-12 individuals with disabilities, who are enrolled in the charter, including children who have been suspended or expelled or placed by the charter LEA in a nonpublic school or agency services. The SELPA will provide technical support to any Charter LEAs identified as the DOR for students age 18 to 21 who

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are incarcerated in a county jail and remaining eligible for special education to assist in meeting their obligation. The SELPA may facilitate collaboration with the county jails as requested. Students shall be referred for special education instruction and services only after the resources of the regular education program have been considered and, where appropriate, utilized. (Education Code 56303)



AGREEMENT FOR PARTICIPATION

EL DORADO CHARTER SELPA

This Agreement for Participation ("Agreement") is entered into by and between the El Dorado Charter SELPA ("SELPA"), the El Dorado County Office of Education ("EDCOE"), and _____ ("LEA"), a California public charter school, collectively referred to as the "Parties."

RECITALS

WHEREAS, each special educational local plan area is required to administer local plans submitted pursuant to Education Code section 56205 et seq., administer the allocation of funds pursuant to Education Code section 56836 et seq., and ensure that it has in effect policies, procedures, and programs that are consistent with state laws, regulations, and policies governing certain aspects of special education;

WHEREAS, a charter school that is deemed a local educational agency for purposes of special education is required to participate in an approved local plan pursuant to Education Code section 56195.1(f);

WHEREAS, LEA is a charter school that is deemed a local educational agency for purposes of special education pursuant to Education Code section 47641 and is responsible for complying with all provisions of the Individuals with Disabilities Education Act (20 U.S.C. 1400 et seq.) and implementing regulations as they relate to local educational agencies;

WHEREAS, the SELPA as authorized by the California State Board of Education serves as the special educational local plan area for California charter schools deemed local educational agencies pursuant to Education Code section 47641 that have successfully completed the SELPA membership process and have signed this Agreement for Participation ("Agreement");

WHEREAS, EDCOE is designated in the local plan as the "responsible local agency" for the SELPA, which means the administrative entity, the duties of which shall include, but are not limited to, receiving and distributing state and federal special education funds pursuant to the allocation plan, providing administrative support, and coordinating implementation of the plan;

WHEREAS, the actions and decisions of the parties are guided by the values of:

1. Commitment – maintaining high standards for performance in student achievement, operations, governance and finance;
2. Integrity – adherence to moral and ethical principles in all aspects of the work;
3. Fairness – impartial and just treatment of all stakeholders;
4. Partnership – collaborative decision making and accountability;
5. Knowledge – understanding of charter school law and practice; and
6. Transparency- access to the information, decisions, and actions of the organization;

WHEREAS, the purpose of this agreement is to set forth the various responsibilities of LEA, EDCOE, and SELPA to ensure that all charter pupils with exceptional needs within the SELPA receive appropriate special education programs.



NOW, THEREFORE, IT IS HEREBY AGREED between the parties hereto as follows:

1. SHARED COMMITMENTS

- 1.1. Resource Allocation. Parties shall demonstrate commitment to the promises set forth in this Agreement by allocating appropriate resources.
- 1.2. Standard of Conduct. Parties, at all times, shall conduct themselves in such a manner as to act in the best interests of all other SELPA members. The LEA shall not engage in any activity or enterprise which would tend to injure or expose the SELPA or any of its members to any significant risk of harm or injury of any kind.
- 1.3. Compliance. All parties to this agreement shall identify and comply with applicable laws, regulations, policies, procedures and generally accepted standards. Each party will address any identified compliance gaps in a responsible and timely fashion.
- 1.4. Continual Improvement. Parties are expected to continually improve by setting performance objectives, executing plans and taking necessary corrective actions for deficiencies identified by any and all internal and/or external assessments.
- 1.5. Accuracy of Business Records. Parties shall ensure that any and all financial books and records conform to generally accepted accounting principles and state reporting requirements. Records must be accurate in all material respects. Records must be legible, transparent, and reflect actual transactions and payments and be open to inspection by the other party upon a reasonable request.
- 1.6. Accuracy of Student Records. Parties shall ensure that any and all student records conform to prescribed formats. Records must be legible, transparent, reflect actual transactions and payments, and be accurate in all material respects. Records must be open to inspection and review by other parties with legitimate educational interest upon a request.
- 1.7. Documentation. Parties shall maintain documentation necessary to demonstrate compliance with this Agreement and compliance with applicable state and federal statutes and regulations.
- 1.8. Local and Allocation Plans. Parties agree to the provisions of the Local and Allocation Plans as updated and approved by the CEO Council.
- 1.9. Provision of Free and Appropriate Public Education. The LEA is solely responsible for the provision of special education programs and services to eligible students enrolled in the LEA. The Parties understand and agree that the SELPA or EDCOE shall have no responsibility for the operation of any direct educational program or service of any kind, that the SELPA has no duty or authority to provide FAPE to individual students, and that the SELPA has no duty or authority to make decisions regarding the educational programming of students enrolled in the LEA.



2. **LEA/ORGANIZATIONAL PARTNER RESPONSIBILITIES**

- 2.1 **Programs and Services.** The LEA is solely and exclusively responsible for the following mandated activities in order to operate its special education programs and services for students enrolled in the LEA. As such, the LEA shall:
- 2.1.1. Select, employ, compensate, and determine the duties of, or establish appropriate contracts for the provision of, special education teachers, instructional aides, and other personnel as required to conduct the program specified in the Local Plan, and in compliance with state and federal mandates.
 - 2.1.2. Conduct and/or contract those programs operated by the LEA in conformance with the Local Plan and the state and federal mandates.
 - 2.1.3. Organize and administer the activities of the IEP teams, including the selection of the LEA staff and who will serve as members of the IEP team in conformance with Education Code Section 56341 and in compliance with the Local Plan.
 - 2.1.4. Develop and implement program objectives and the evaluation of the program's effectiveness.
 - 2.1.5. Communicate with the parents and/or legal guardians of students in conformance with laws, regulations, and the provisions of the Local Plan.
 - 2.1.6. Provide for the documentation and reporting of assessment procedures used for the placement of individuals and the security thereof.
 - 2.1.7. Provide for the continuous review of placements and the assessment procedures employed to ensure their effectiveness and applicability, and ensure the continued implementation and compliance with eligibility criteria.
 - 2.1.8. Provide for the integration of students with disabilities into the general education school programs and provide for evaluating the results of such integration according to specifications of the Local Plan.
 - 2.1.9. Conduct the review of individual placements requested by the parents and/or legal guardians of the student in accordance with the Local Plan.
 - 2.1.10. Prepare and submit all required reports, including reports on student enrollment, program expenditures, and program evaluation.
- 2.2. **Fiscal Responsibilities.** Receive and expend special education funding in accordance with the Charter SELPA Allocation Plan. Organizational Partners affirm that any financial claim made by the SELPA against an LEA that is part of the Organizational Partner's network of LEAs will be honored by the Organization Partner.
- 2.3. **Restricted Funds.** As a condition of membership and participation in the SELPA, LEA warrants and represents that at no time during the term of this Agreement



and LEA's membership and participation in the SELPA shall the LEA, directly or indirectly, provide special education funding for the benefit of a for-profit entity. Unless altered by law, all funding provided through the Charter SELPA shall be treated as a restricted funding source to be expended only for special education or special education services. Nothing contained herein shall be interpreted as prohibiting any LEA from expending funds to contract with a state-certified nonpublic agency/school for the benefit of children served, in accordance with the approved master contract and individual services agreements as provided for in federal and state law.

- 2.4. Audit Report. Annually provide the SELPA with the LEA's annual, independent financial audit report, on or before December 20th each year, unless an extension has been granted by the State Controller's Office, in which case an extension will be granted to the charter as well. LEA further agrees to provide SELPA copies of any and all State Controller's Office communications regarding audit report corrective actions and a corrected audit report, if applicable. Should an LEA be the subject of an investigation by any federal, state, or local agency, including but not limited to the Fiscal Crisis Management and Assistance Team ("FCMAT") arising out of or related to allegations of fiscal mismanagement, failure to meet generally accepted accounting principles, or any violation of a provision of law, the LEA shall immediately notify SELPA and provide the SELPA with a copy of any written correspondence related thereto.
- 2.5. Membership Responsibilities. Adhere to governance structure within SELPA Local Plan and Policies, including designating appropriate representatives to serve on required councils and committees; ensure appropriate LEA representatives attend and participate in SELPA governance meetings as set forth in the Local Plan, Policies and Procedures.
- 2.6. Management Decisions. Consistent with this Agreement, LEA shall have full and exclusive authority and responsibility for classifying employment positions within their LEA. The managerial prerogatives of any participating LEA member shall not be infringed upon by any other participating LEA member except upon mutual consent of an affected LEA member(s), or unless as otherwise set forth. LEA shall not undertake to independently act on behalf of the SELPA or any of its members without express written authorization of the SELPA.
- 2.7. Participation. Ensure appropriate LEA representatives attend and participate in SELPA governance meetings and committees as set forth in the Local Plan, Policies and Procedures.
- 2.8. Reporting Requirements. Submit all required federal, state and SELPA reports and data requests in the prescribed format and at the specified due date. Upon written request by the SELPA, LEA shall provide any requested information, documents, writings, or information of any sort without delay, except as otherwise prohibited by law.
- 2.9. Indemnification and Hold Harmless. To the fullest extent allowed by law, LEA agrees to defend, indemnify, and hold harmless the SELPA and its individual other



members, EDCOE, the El Dorado County Superintendent of Schools, and each of their respective directors, officers, agents, employees, and volunteers (the Indemnified Parties), from any claim or demand, damages, losses or expenses (including, without limitation, reasonable attorney fees) that arise in any manner from an actual or alleged failure by LEA to fulfill one or more of the LEA member's obligations except to the extent that such suit arises from the SELPA, EDCOE, or the El Dorado County Superintendent of Schools' negligence.

3. **SELPA DUTIES AND RESPONSIBILITIES**

3.1 Services. In order to accomplish the goals set forth in the Local Plan, SELPA shall provide the following services and activities for the LEA:

- 3.1.1. Receive, compile, and submit required enrollment reports and compute all special education apportionments; receive data from LEA to compile and submit budgets for the programs and monitor the fiscal aspects of the program conducted, and receive the special education apportionments as authorized by applicable law.
- 3.1.2. Maintain SELPA policies and procedures for referring and placing individuals with exceptional needs who are enrolled in the LEA, including the methods and procedures for communication with the parents and/or guardians of the students according to SELPA Local Plan, Policies and Procedures.
- 3.1.3. Coordinate the organization and maintenance of the Special Education Community Advisory Committee ("CAC") to coordinate the implementation of the Local Plan and provide for the attendance of designated members of the SELPA's staff at all regularly scheduled CAC meetings as required by law.
- 3.1.4. Coordinate community resources with those provided by LEA and SELPA, including providing such contractual agreements as may be required.
- 3.1.5. Coordinate state Special Education Accountability Processes.
- 3.1.6. Provide alternative dispute resolution supports and services.
- 3.1.7. Develop interagency referral and placement procedures.
- 3.1.8. Provide regular personnel development training sessions for LEA staff responsible for administering or delivering special education programs and services.
- 3.1.9. Provide the method and forms to enable the LEA to report to the SELPA on student enrollment and program expenditures. Establish and maintain a pupil information system.
- 3.1.10. Provide reasonable and appropriate technical assistance and information to the LEA upon request from LEA administration, including but not limited to:
 1. Evidenced Based Practices;
 2. Program Development and Improvement;



3. Individual cases;
4. State complaints;
5. Requests for due process mediation and hearing; and
6. Appropriate programs and services for specific pupils.

3.1.11. Perform other services reasonable and necessary to the administration and coordination of the Local Plan.

- 3.2. Governance. Organize and maintain the governance structure of the Local Plan, including various committees and councils to monitor the operations of the SELPA and make recommendations for necessary revisions, including, but not limited to, the Local Plan, Allocation Plan and Policies.
- 3.3. Data Reporting. Establish and maintain methods, timelines and forms to submit required federal, state and SELPA reports.
- 3.4. Public Meetings. Schedule public meetings for purposes of governance activities and adopting the Annual Service Plan and Budget Plan.
- 3.5. Fiscal Responsibilities. Receive, distribute, and oversee the expenditure of special education funds in accordance with federal and state regulations and the SELPA Allocation Plan.
- 3.6. Indemnification and Hold Harmless. The SELPA shall be held harmless and indemnify EDCOE and the El Dorado County Superintendent of Schools for any costs of any kind or nature arising out of or related to this agreement other than as specifically contemplated herein, except to the extent that such cost arises from EDCOE and the El Dorado County Superintendent of Schools' negligence.

4. EDCOE DUTIES AND RESPONSIBILITIES

- 4.1. The Parties understand that EDCOE is designated in the Local Plan as the "responsible local agency" for the SELPA. EDCOE shall receive and distribute state and federal special education funds pursuant to the Allocation Plan, provide administrative support, and coordinate implementation of the Local Plan in accordance with state and federal law.
- 4.2. EDCOE shall not be responsible for any LEA or SELPA obligations or duties of any kind or nature except as explicitly set forth in this agreement.

5. TERMINATION OF THIS AGREEMENT AND PARTICIPATION IN SELPA

- 5.1. LEA may terminate this Agreement and participation in the SELPA in its sole discretion at the end of the fiscal year next occurring after having provided prior written notice to the SELPA, as follows:
 - 5.1.1. Prior initial written notice of intended termination to the SELPA at least twelve (12) months and one (1) day in advance of date of termination; and
 - 5.1.2. Final written notice of termination to the SELPA no more than six (6) months after the LEA's initial notice of intended termination.
- 5.2. The SELPA may initiate and complete termination of this Agreement and LEA's participation in the SELPA in its sole discretion in accordance with the process and



standards in SELPA Policies. The SELPA will provide prior written notice to the LEA at least twelve (12) months as follows:

- 5.2.1. Prior initial written notice of intended termination to the LEA at least twelve (12) months and one (1) day in advance of date of termination, and
 - 5.2.2. Final written notice of termination to the LEA no more than six (6) months after the SELPA's initial notice of intended termination.
- 5.3. Specifically the timeline and process above does not preclude the SELPA from initiating and completing the termination process in less than 12 months or by June 30 of the year immediately preceding the summary termination, if the member demonstrates:
- 5.3.1. Egregious disregard of state and federal requirements to provide services to students; and/or
 - 5.3.2. Demonstrated systemic and material issues that would cause the SELPA to make a finding of "going concern" based on leadership, programmatic and/or fiscal solvency that would cause SELPA to reasonably believe the SELPA may be harmed by the continued membership of the LEA.

The standards and timeline as determined by the SELPA shall, at a minimum, provide the LEA a reasonable opportunity for prior written notice and an opportunity to be heard by the Membership Appeals Committee.

6. DISPUTE RESOLUTION

Should a dispute arise relating to the responsibility for service provision, governance activities, the distribution of funding, if a party believes that an action taken by the CEO Council will create an undue hardship, or that the action taken exceeds the authority granted to the CEO Council within the Local Plan and/or state or federal statute, the aggrieved party may request a review of the action with the appropriate governing body or CDE as appropriate.

7. MUTUAL REPRESENTATIONS

- 7.1. Authority and Capacity. The Parties have the authority and capacity to enter into this agreement.
- 7.2. Full Disclosure. All information heretofore furnished by the Parties for purposes of or in connection with this Agreement or any transaction contemplated hereby or thereby is true and accurate in all material respects on the date as of which such information is stated.
- 7.3. No Conflicts. Neither party is under any restriction or obligation that may affect the performance of its obligations under this agreement.
- 7.4. Enforceability. This Agreement constitutes a legal, valid, and binding obligation, enforceable against the Parties according to its terms.



8. **RESERVATION OF RIGHTS**

The Parties hereto agree that nothing contained in this Agreement or otherwise shall be deemed to have waived or modified any of their rights or remedies under the law.

This agreement is entered into for the 2021-22 year and, absent a new agreement or termination, continues each year thereafter.

Executed on this ____ day of _____, 20_____.

In accordance with SELPA policy, _____,

[INSERT Charter LEA Name]

certifies that this agreement has been approved by the appropriate local board(s).

LEA

Date

Signature of CEO of Charter LEA

[PRINT CEO Name, Title]

EL DORADO COUNTY OFFICE OF EDUCATION

Date

Ed Manansala, Ed.D., Superintendent
El Dorado County Office of Education

Date

Ginese Quann
Executive Director
SELPA Programs
El Dorado County Office of Education

AGREEMENT FOR PARTICIPATION
EL DORADO CHARTER SELPA

This Agreement for Participation ("Agreement") is entered into by and between the El Dorado Charter SELPA ("SELPA"), the El Dorado County Office of Education ("EDCOE"), and _____ ("LEA"), a California public charter school, collectively referred to as the "Parties."

RECITALS

WHEREAS, each special educational local plan area is required to administer local plans submitted pursuant to Education Code section 56205 et seq., administer the allocation of funds pursuant to Education Code section 56836 et seq., and ensure that it has in effect policies, procedures, and programs that are consistent with state laws, regulations, and policies governing certain aspects of special education;

WHEREAS, a charter school that is deemed a local educational agency for purposes of special education is required to participate in an approved local plan pursuant to Education Code section 56195.1(f);

WHEREAS, LEA is a charter school that is deemed a local educational agency for purposes of special education pursuant to Education Code section 47641 and is responsible for complying with all provisions of the Individuals with Disabilities Education Act (20 U.S.C. 1400 et seq.) and implementing regulations as they relate to local educational agencies;

WHEREAS, the SELPA as authorized by the California State Board of Education serves as the special educational local plan area for California charter schools deemed local educational agencies pursuant to Education Code section 47641 that have successfully completed the SELPA membership process and have signed this Agreement for Participation ("Agreement");

WHEREAS, EDCOE is designated in the local plan as the "responsible local agency" for the SELPA, which means the administrative entity, the duties of which shall include, but are not limited to, receiving and distributing state and federal special education funds pursuant to the allocation plan, providing administrative support, and coordinating implementation of the plan;

WHEREAS, the actions and decisions of the parties are guided by the values of:

1. Commitment – maintaining high standards for performance in student achievement, operations, governance and finance;
2. Integrity – adherence to moral and ethical principles in all aspects of the work;
3. Fairness – impartial and just treatment of all stakeholders;
4. Partnership – collaborative decision making and accountability;
5. Knowledge – understanding of charter school law and practice; and
6. Transparency- access to the information, decisions, and actions of the organization;

WHEREAS, the purpose of this agreement is to set forth the various responsibilities of LEA, EDCOE, and SELPA to ensure that all charter pupils with exceptional needs within the SELPA receive appropriate special education programs.

NOW, THEREFORE, IT IS HEREBY AGREED between the parties hereto as follows:

1. SHARED COMMITMENTS

- 1.1. Resource Allocation. Parties shall demonstrate commitment to the promises set forth in this Agreement by allocating appropriate resources.
- 1.2. Standard of Conduct. Parties, at all times, shall conduct themselves in such a manner as to act in the best interests of all other SELPA members. The LEA's shall not engage in any activity or enterprise which would tend to injure or expose the SELPA or any of its members to any significant risk of harm or injury of any kind.
- 1.3. Compliance. All parties to this agreement shall identify and comply with applicable laws, regulations, policies, procedures and generally accepted standards. Each party will address any identified compliance gaps in a responsible and timely fashion.
- 1.4. Continual Improvement. Parties are expected to continually improve by setting performance objectives, executing plans and taking necessary corrective actions for deficiencies identified by any and all internal and/or external assessments.
- 1.5. Accuracy of Business Records. Parties shall ensure that any and all financial books and records conform to generally accepted accounting principles and state reporting requirements. Records must be accurate in all material respects. Records must be legible, transparent, and reflect actual transactions and payments and be open to inspection by the other party upon a reasonable request.
- 1.6. Accuracy of Student Records. Parties shall ensure that any and all student records conform to prescribed formats. Records must be legible, transparent, reflect actual transactions and payments, and be accurate in all material respects. Records must be open to inspection and review by other parties with legitimate educational interest upon a request and upon parental consent.
- 1.7. Documentation. Parties shall maintain documentation necessary to demonstrate compliance with this Agreement and compliance with applicable state and federal statutes and regulations.
- 1.8. Local and Allocation Plans. Parties agree to the provisions of the Local and Allocation Plans as updated and approved by the CEO Council.
- 1.9. Provision of Free and Appropriate Public Education. The LEA is solely responsible for the provision of special education programs and services to eligible students enrolled in the LEA. The Parties understand and agree that the SELPA or EDCOE shall have no responsibility for the operation of any direct educational program or service of any kind, that the SELPA has no duty or authority to provide FAPE to individual students, and that the SELPA has no duty or authority to make decisions regarding the educational programming of students enrolled in the LEA.

2. LEA/ORGANIZATIONAL PARTNER RESPONSIBILITIES

- 2.1 Programs and Services. The LEA is solely and exclusively responsible for the following mandated activities in order to operate its special education

programs and services for students enrolled in the LEA. As such, the LEA shall:

- 2.1.1. Select, employ, compensate, and determine the duties of, or establish appropriate contracts for the provision of, special education teachers, instructional aides, and other personnel as required to conduct the program specified in the Local Plan, and in compliance with state and federal mandates.
 - 2.1.2. Conduct and/or contract those programs operated by the LEA in conformance with the Local Plan and the state and federal mandates.
 - 2.1.3. Organize and administer the activities of the IEP teams, including the selection of the LEA staff and who will serve as members of the IEP team in conformance with Education Code Section 56341 and in compliance with the Local Plan.
 - 2.1.4. Develop and implement program objectives and the evaluation of the program effectiveness.
 - 2.1.5. Communicate with the parents and/or legal guardians of students in conformance with laws, regulations and the provisions of the Local Plan.
 - 2.1.6. Provide for the documentation and reporting of assessment procedures used for the placement of individuals and the security thereof.
 - 2.1.7. Provide for the continuous review of placements and the assessment procedures employed to insure their effectiveness and applicability, and insure the continued implementation and compliance with eligibility criteria.
 - 2.1.8. Provide for the integration of students with disabilities into the general education school programs and provide for evaluating the results of such integration according to specifications of the Local Plan.
 - 2.1.9. Conduct the review of individual placements requested by the parents and/or legal guardians of the student in accordance with the Local Plan.
 - 2.1.10. Prepare and submit all required reports, including reports on student enrollment, program expenditures, and program evaluation.
- 2.2. Fiscal Responsibilities. Receive and expend special education funding in accordance with the Charter SELPA Allocation Plan. Organizational Partners affirm that any financial claim made by the SELPA against an LEA that is part of the Organizational Partner's network of LEAs will be honored by the Organization Partner.
- 2.3. Restricted Funds. As a condition of membership and participation in the SELPA, LEA warrants and represents that at no time during the term of this Agreement and LEA's membership and participation in the SELPA shall the LEA, directly or indirectly, provide special education funding for the benefit of a for-profit entity. Unless altered by law, All funding provided through the Charter SELPA shall be treated as a restricted funding

source to be expended only for special education or special education services. Nothing contained herein shall be interpreted as prohibiting any LEA from expending funds to contract with a state-certified nonpublic agency/school for the benefit of children served, in accordance with the approved master contract and individual services agreements as provided for in federal and state law.

- 2.4. Audit Report. Annually provide the SELPA with the LEA's annual, independent financial audit report, on or before December 20th each year, unless an extension has been granted by the State Controller's Office, in which case an extension will be granted to the charter as well. LEA further agrees to provide SELPA copies of any and all State Controller's Office communications regarding audit report corrective actions and a corrected audit report, if applicable. Should an LEA be the subject of an investigation by any federal, state, or local agency, including but not limited to the Fiscal Crisis Management and Assistance Team ("FCMAT") arising out of or related to allegations of fiscal mismanagement, failure to meet generally accepted accounting principles, or any violation of a provision of law, the LEA shall immediately notify SELPA and provide the SELPA with a copy of any written correspondence related thereto.
- 2.5. Membership Responsibilities. Adhere to governance structure within SELPA Local Plan and Policies including designating appropriate representatives to serve on required councils and committees; ensure appropriate LEA representatives attend and participate in SELPA governance meetings as set forth in the Local Plan, Policies and Procedures.
- 2.6. Management Decisions. Consistent with this Agreement, LEA shall have full and exclusive authority and responsibility for classifying employment positions within their LEA. The managerial prerogatives of any participating LEA member shall not be infringed upon by any other participating LEA member except upon mutual consent of an affected LEA member(s), or unless as otherwise set forth. LEA shall not undertake to independently act on behalf of the SELPA or any of its members without express written authorization of the SELPA.
- 2.7. Participation. Ensure appropriate LEA representatives attend and participate in SELPA governance meetings and committees as set forth in the Local Plan, Policies and Procedures.
- 2.8. Reporting Requirements. Submit all required federal, state and SELPA reports and data requests in the prescribed format and at the specified due date. Upon written request by the SELPA, LEA shall provide any requested information, documents, writings, or information of any sort without delay, except as otherwise prohibited by law.
- 2.9. Indemnification and Hold Harmless. To the fullest extent allowed by law, LEA agrees to defend, indemnify, and hold harmless the SELPA and its individual other members, EDCOE, the El Dorado County Superintendent of Schools, and each of their respective directors, officers, agents, employees, and volunteers (the Indemnified Parties), from any claim or demand, damages, losses or expenses (including, without limitation, reasonable attorney fees) that arise in any manner from an actual or alleged failure by LEA to fulfill one or more of the LEA member's obligations

except to the extent that such suit arises from the SELPA, EDCOE, or the El Dorado County Superintendent of Schools' negligence.

3. **SELPA DUTIES AND RESPONSIBILITIES**

3.1 **Services.** In order to accomplish the goals set forth in the Local Plan, SELPA shall provide the following services and activities for the LEA:

- 3.1.1. Receive, compile, and submit required enrollment reports and compute all special education apportionments; receive data from LEA to compile and submit budgets for the programs and monitor the fiscal aspects of the program conducted, and receive the special education apportionments as authorized by applicable law.
- 3.1.2. Maintain SELPA policies and procedures for referring and placing individuals with exceptional needs who are enrolled in the LEA, including the methods and procedures for communication with the parents and/or guardians of the students according to SELPA Local Plan, Policies and Procedures.
- 3.1.3. Coordinate the organization and maintenance of the Special Education Community Advisory Committee ("CAC") to coordinate the implementation of the Local Plan and provide for the attendance of designated members of the SELPA's staff at all regularly scheduled CAC meetings as required by law.
- 3.1.4. Coordinate community resources with those provided by LEA and SELPA, including providing such contractual agreements as may be required.
- 3.1.5. Coordinate state ~~Quality Assurance Process~~Special Education Accountability Processes.
- 3.1.6. Provide alternative dispute resolution supports and services.
- 3.1.7. Develop interagency referral and placement procedures.
- 3.1.8. Provide regular personnel development training sessions for LEA staff responsible for administering or delivering special education programs and services.
- 3.1.9. Provide the method and forms to enable the LEA to report to the SELPA on student enrollment and program expenditures. Establish and maintain a pupil information system.
- 3.1.10. Provide reasonable and appropriate technical assistance and information to the LEA upon request from LEA administration, including but not limited to:
 1. Evidenced Based Practices;
 2. Program Development and Improvement;
 3. Individual cases;
 4. State complaints;
 5. Requests for due process mediation and hearing; and
 6. Appropriate programs and services for specific pupils.
- 3.1.11. Perform other services reasonable and necessary to the administration and coordination of the Local Plan.

3.2. **Governance.** Organize and maintain the governance structure of the Local

Plan including various committees and councils to monitor the operations of the SELPA and make recommendations for necessary revisions, including, but not limited to, the Local Plan, Allocation Plan and Policies.

- 3.3. Data Reporting. Establish and maintain methods, timelines and forms to submit required federal, state and SELPA reports.
- 3.4. Public Meetings. Schedule public meetings for purposes of governance activities and adopting the Annual Service Plan and Budget Plan.
- 3.5. Fiscal Responsibilities. Receive, distribute, and oversee the expenditure of special education funds in accordance with federal and state regulations and the SELPA Allocation Plan.
- 3.6. Indemnification and Hold Harmless. The SELPA shall be held harmless and indemnify EDCOE and the El Dorado County Superintendent of Schools for any costs of any kind or nature arising out of or related to this agreement other than as specifically contemplated herein, except to the extent that such cost arises from EDCOE and the El Dorado County Superintendent of Schools' negligence.

4. EDCOE DUTIES AND RESPONSIBILITIES

- 4.1. The Parties understand that EDCOE is designated in the Local Plan as the "responsible local agency" for the SELPA. EDCOE shall receive and distribute state and federal special education funds pursuant to the Allocation Plan, provide administrative support, and coordinate implementation of the Local Plan in accordance with state and federal law.
- 4.2. EDCOE shall not be responsible for any LEA or SELPA obligations or duties of any kind or nature except as explicitly set forth in this agreement.

5. TERMINATION OF THIS AGREEMENT AND PARTICIPATION IN SELPA

- 5.1. LEA may terminate this Agreement and participation in the SELPA in its sole discretion at the end of the fiscal year next occurring after having provided prior written notice to the SELPA, as follows:
 - 5.1.1. Prior initial written notice of intended termination to the SELPA at least twelve (12) months and one (1) day in advance of date of termination; and
 - 5.1.2. Final written notice of termination to the SELPA no more than six (6) months after the LEA's initial notice of intended termination.
- 5.2. The SELPA may initiate and complete termination of this Agreement and LEA's participation in the SELPA in its sole discretion in accordance with the process and standards in SELPA Policies. The SELPA will provide prior written notice to the LEA at least twelve (12) months as follows:
 - 5.2.1. Prior initial written notice of intended termination to the LEA at least twelve (12) months and one (1) day in advance of date of termination, and
 - 5.2.2. Final written notice of termination to the LEA no more than six (6) months after the SELPA's initial notice of intended termination.
- 5.3. Specifically the timeline and process above does not preclude the SELPA from initiating and completing the termination process in less than 12 months or by June 30 of the year immediately preceding the summary termination, if the member demonstrates:

- 5.3.1. Egregious disregard of state and federal requirements to provide services to students; and/or
- 5.3.2. Demonstrated systemic and material issues that would cause the SELPA to make a finding of “going concern” based on leadership, programmatic and/or fiscal solvency that would cause SELPA to reasonably believe the SELPA may be harmed by the continued membership of the LEA.

The standards and timeline as determined by the SELPA shall, at a minimum, provide the LEA a reasonable opportunity for prior written notice and an opportunity to be heard by the Membership Appeals Committee.

6. DISPUTE RESOLUTION

Should a dispute arise relating to the responsibility for service provision, governance activities, the distribution of funding, if a party believes that an action taken by the CEO Council will create an undue hardship, or that the action taken exceeds the authority granted to the CEO Council within the Local Plan and/or state or federal statute, the aggrieved party may request a review of the action with the appropriate governing body or CDE as appropriate.

7. MUTUAL REPRESENTATIONS

- 7.1. Authority and Capacity. The Parties have the authority and capacity to enter into this agreement.
- 7.2. Full Disclosure. All information heretofore furnished by the Parties for purposes of or in connection with this Agreement or any transaction contemplated hereby or thereby is true and accurate in all material respects on the date as of which such information is stated.
- 7.3. No Conflicts. Neither party is under any restriction or obligation that may affect the performance of its obligations under this agreement.
- 7.4. Enforceability. This Agreement constitutes a legal, valid, and binding obligation, enforceable against the Parties according to its terms.

8. RESERVATION OF RIGHTS

The Parties hereto agree that nothing contained in this Agreement or otherwise shall be deemed to have waived or modified any of their rights or remedies under the law.

This agreement is entered into for the 2021-22 year and, absent a new agreement or termination, continues each year thereafter.

Executed on this ____ day of _____, 20____.

In accordance with SELPA policy,_____

____/

[INSERT Charter LEA Name]

certifies that this agreement has been approved by the appropriate local board(s).

LEA

Date

Signature of CEO of Charter LEA

[PRINT CEO Name, Title]

EL DORADO COUNTY OFFICE OF EDUCATION

Date

Ed Manansala, Ed.D., Superintendent
El Dorado County Office of Education

Date

David M. Toston, Associate Superintendent
SELPA Programs
El Dorado County Office of Education

Agenda Item: Interim Charter Council Member Election

Prepared by: Alexandra Archer

Charter Council Date: 02/16/2021

Background Information:

On Tuesday, January 19th the Blue Oak Charter Council accepted the resignation of one of our Charter Council members. There is now a vacant Parent Seat on the BOCC available. As this is an interim position to finish out the remaining term for a previously elected Council member, voting will take place by Charter Council members only. This seat will be up for re-election in June 2021.

The applicant information is included in this packet. The following applicants applied for this position:

- Amber Brown

AMBER HOWARD-BROWN

16 Woodside Lane

Chico, CA 95926

Email: ahschumacher12@gmail.com

(530) 513-4934

I am a mother of six children, three of which attend Blue Oak Charter School (kindergarten, 2nd grade and 6th grade). Currently, I am the 6th grade parent representative (Ally Welch's class) for the Blue Oak Parent Council.

I have worked in property management for over fifteen years, managing large properties which included managing and overseeing many employees. During that time, I created budgets for multiple properties and worked directly with outside contractors and vendors in a collaborative effort to ensure that everything ran smoothly at each property. I also worked on planning and implementing marketing plans for multiple properties.

I have also volunteered and coached both local Little League softball and Youth Football cheerleading which constitutes working with children and parents both on the field and off. Part of coaching also includes fund raising for the league.

I was involved with Relay for Life for several years, fund raising and eventually becoming a team captain.



AMBER HOWARD-BROWN

16 WOODSIDE LANE, CHICO, CA 95926 / (530) 513-4934 / AHSCHUMACHER12@GMAIL.COM

Experience

Self-employed, Paralegal and Bookkeeping

8/2018- Current

- Quick books entry, month end close including balancing retainer accounts and processing checks
- Assist with prepare legal documents and letters
- Complete and oversee training of all employees.

Property Management:

3/2002-12/2017

FPI Management, Regional Portfolio Manager

- Responsible for 900-1000 units, overseeing 7 Managers and 3 Asset Managers
- Oversaw all operational, financial, marketing, employees and management of a property portfolio ranging from 900 to 1,000 units throughout the Solano area.
- Created annual budgets, implemented, and tracked to increase NOI on a monthly and annual basis.
- Worked directly with contractors and in-house construction crews, both interior and exterior to increase NOI and increase the sales price.
- Led employee recruitment efforts and led training & development activities throughout multiple regions.
- Directed new hire training for all office employees
- Presided over monthly financial completion which included income and expense reforecasting, GL/variance review and re-classes, R&M/Capital review and forecast.

Sequoia Equities, General Manager

- Managed 700 beds as well as thirty-two employees in sales, operations, food and beverage.
- Implemented leasing marketing plans to support Leasing Team during student leasing season
- Coordinate and manage Annual Student Turn

- Oversee day to day community operations including reporting and developing action plans align property/company goals.
- Prepare and present annual budgets including predicting annual revenue growth, turnover and expenses
- Partner with Sodexo to provide an exceptional Dining Hall experience
- Vendor relations and expense control
- Hire, recruit, and develop department managers with the goal of ensuring excellent service, business orientation, and internal promote-ability.

Business Legal Financial Center, Leasing and Marketing Associate

- Leasing and marketing for 180 Executive Suites
- Develop creative and innovative marketing and advertising ideas
- Analyze current market values and adjust rental rates accordingly.
- Oversee leasing for five locations, including negotiating all lease terms, rents and preparing documents.
- Maintained web postings, print advertising, and company website and managed Google advertising.
- Worked with new and current residents throughout the leasing process
- Drove collection efforts.

Education

U.S. Career Institute

Paralegal Studies and Certification

10/2019-Current

City College of San Francisco

San Francisco High-Rise Fire Safety Director Certification

Completed 12/2012

California Tax-Exempt Bond and Affordable Housing Certification

Completed 01/2009

Acknowledgements/Volunteer Work

- Blue Oak Parent Council 6th Grade Representative for Ally Welch – 2020-2021 School Year
- Chico Softball Little League Manager - 2019 and 2020 Seasons
- Pleasant Valley Jr. Vikings Youth Cheer Head Coach - 2017-2020

- o 2019 - 1st place in Regional Cheer Qualifiers competition and 4th in SYF Cheer Championship competition
- Sequoia CX (Customer Service) Council Member 2015/2016
 - o Council is picked by nominations from at least two executive leaders in the company. Goals included social responsibilities to community and employees, evaluation of employee benefits, improvement to overall customer service, personalized incentives and amenities for residents, SWOT matrix, marketing and action plans to measure and achieve goals.
- 2010 Team Captain - Relay for Life, Roseville and participated in 2011, 2012, 2014, 2015 and 2016 Relay for Life.



Executive Director's Report

Susan Domenighini

February 16, 2021



Favorite Moments

Covering for Susan Whittelsey reading to Kindergarteners.

Appreciation from students

"At the end of the day, one of my kiddos says that they're being picked up from "educational prison". It makes me laugh every time."

"Just finished speaking with a student who wrote an email to Susan asking to be class president. "

I was telling a student I was worried about them not getting their work done because that's part of my job. The student said, "Your job is not to worry. Your job is to be happy!"

Fairytales

I was able to meet directly with Ryan Sanders on January 12th. Alicia was not able to come. We reviewed his concerns about Fairytales. We agreed that fairytales themselves are not the issue but when a character that is represented as good authorizes or contributes to violent or evil behavior these fairytales should not be used. I shared that we will continue to address uncomfortable and difficult issues through fairytales and throughout the curriculum. Our purpose is not to shelter children from the world but to use a safe environment to help them look a difficult situation in the eye and overcome it.

I brought this to the Pedagogical Team and they were satisfied with that assessment.

Ryan agreed to help by supplying the school with more material. I suggested that the first-grade teacher hold a classroom meeting to discuss the use of fairy tales and their importance to the internal growth of children.

Sadlier Material

Equity and Anti-Racism

I met with Alicia Sanders on January 26th to address the concerns she brought up during the last board meeting. I reviewed the Sadlier material and where we are with Equity and

Anti-Racism. After the discussion and the concerns expressed at the board meeting I asked the parents on the Taskforce for their understanding while staff met this month and next to establish priorities and plans for the support and changes they are engaging in. I attended two sessions of the Butte County Coalition for Equity in Education and met with Mharia Ross-Wollcot a founding member of that group concerning paths to equity and diversity within Butte County schools.

Faculty and Staff have been invited to:

- 1) a series of free to members Alliance for Public Waldorf webinars Reimagining Waldorf Pedagogy: Nurturing Social Renewal Through Education for Racial Justice
- 2) an online conference Equity in Action by ASCD, available for \$49 per attendee

All are taped for convenience.

COVID

We developed a plan for a split classroom model for two on-site classes to increase the number of students we could get on campus. This didn't work, but because the requirements have dropped to four feet we are still able to accommodate those that are on site.

We have had some rainy days, students are outside under the eaves for approximately 10 minutes for a snack break. It seems to be working.

Schools are beginning to look toward next year. I will speak more about that in the meeting.

Charter Renewal

I am attending a series from the Charter Schools Association on preparing for renewal. Chairun Combs attended with me this month. The training was on data. Yes, it's time to get ready!

Chico Unified Board Agenda

Blue Oak has put in a card to speak briefly at the next Chico Unified Board Agenda during public comments. I will welcome the new board and speak briefly about the school.

Breakthrough Coach

Thank you to the board for approving Alex and me to attend Breakthrough Coach. We are streamlining our work and accountability systems. I am in classrooms or on Zoom one to two days a week and loving it!