

BLUE OAK CHARTER SCHOOL
450 W. East Avenue, Chico, CA 95926
(Room 24)
CHARTER COUNCIL
REGULAR MEETING AGENDA
Tuesday, February 17, 2026 06:00 PM

Join Zoom Meeting

<https://us06web.zoom.us/j/88069901920?pwd=H8rs5nFCFeIvoqaLOKyLoXHGSIM5SN.1>

Meeting ID: 880 6990 1920

Passcode: 79EGKH

***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.*

***Virtues:** Hold Reverence - Have Courage - Build Friendships - Seek Wisdom - Show Compassion*

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

AGENDA

OPEN SESSION - 6:00PM

1. OPENING

- 1.1.** Call Meeting to Order
- 1.2.** Roll Call of Council Members to establish a 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, and 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 community members to address the council concerning items not on the agenda. Council Members will not respond to comments due to Brown Act expectations concerning agendas. 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 Special & Regular Meeting Minutes (January 2026)
- 2.2. Charter Impact Monthly Report Steve McClain
- 2.3. Cash Flow
 - 2.3.1. Balance Sheet Detail
 - 2.3.2. Warrants/Aged Payable
 - 2.3.3. Actual to Budget Summary
- 2.4. Point of Sale Transactions/Check Register (January 2026)
- 2.5. Credit Card Statement (January 2026)

3. FACULTY

- 3.1. Faculty Report Cheryl Grant
Emily Swanson

4. BUSINESS

- 4.1. Charter Renewal Update Discussion
- 4.2. New School Site Sign Discussion/Action
- 4.3. Student Behavior Health Policy
(New requirement from the state for 7th & -8th grades) Discussion/Action
- 4.4. RGA Contract Kevin Easterling/Trisha Atehortua
- 4.5. Pet Policy Discussion/Action

5. GOVERNANCE

- 5.1. Facilities Committee Report Trisha Atehortua
 - 5.1.1. Select Measure K Committee member & alternate
 - 5.1.2. Select Measure C Committee member & alternate
- 5.2. CDE Site Approval Trisha Atehortua
- 5.3. New Site Contract Approvals Trisha Atehortua
- 5.4. Approval of Draft Schedule Kevin Easterling
- 5.5. Approval of Site Plan Kevin Easterling
- 5.6. Approval of Mobile Modular Contract Kevin Easterling
- 5.7. GVB/School Addition & Transfer of Signors Vicki Wonacott
- 5.8. Interim LCAP Tim Drury
- 5.9. Facilities Committee Report Trisha Atehortua
- 5.10. Finance Committee Report Lauren Cesca

6. ADMINISTRATION

6.1. Executive Director's Report

Tim Drury

7. CLOSED SESSION

7.1. Public Employment Complaint Review §54957

Tim Drury

NEXT MEETING - Wednesday, March 25, 2026 at 6:00 PM

8. ADJOURNMENT

Minutes Taken By: Maggie Buckley

Approved by: _____ Date: _____

BLUE OAK CHARTER SCHOOL
450 W. East Avenue, Chico, CA 95926
(Room 24)
CHARTER COUNCIL
SPECIAL MEETING AGENDA
Tuesday, January 7, 2026 06:00 PM

Join Zoom Meeting

<https://us06web.zoom.us/j/83220250692?pwd=e25307XLEutKm3DoDDLUp10SbqMaRb.1>

Meeting ID: 832 2025 0692

Passcode: Eqz5HE

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AGENDA

OPEN SESSION - 6:00PM

1. OPENING

- 1.1.** Call Meeting to Order 6:03pm
- 1.2.** Roll Call of Council Members to establish a quorum

Name	Present	Absent
Vicki Wonacott	x	
Laurel Hill-Ward		x
Donna Kreskey	x	
Trisha Atehortua	x	
Lauren Cesca	x	

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, and Love of life itself. Let us remember that as many hands build a house, so many hearts build a school.

1.4. Agenda Modifications No agenda modifications at this time.

1.5. Audience to Address the Council

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2. GOVERNANCE

2.1. Charter Renewal Document

Discussion/Action

2.2. Resolution

The board discussed the Charter Renewal timeline. January 21st is the deadline for us to submit our Charter to CUSD. There will be a public hearing on February 11, at Marigold School with the CUSD Board. This is where we will be given 10 minutes to make our plea for charter renewal. We would want a lead presenter to open and close the presentation but faculty, staff, students and alumni are invited to present. Considering the short amount of time we are allotted to present these presentations would need to be short, compelling and impactful. A show of support by our community members is strongly suggested.

Motion to approve the resolution by Trisha Atehortua. Donna Kreskey second motion.

> Vote

Name	Yes	No	Abstain	Absent
Vicki Wonacott	x			
Laurel Hill-Ward				x
Donna Kreskey	x			
Trisha Atehortua	x			

Lauren Cesca	x			
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➤ Vote passes

3. BUSINESS

3.1. Potential New Plan for new site

Discussion/ Action
Trisha Atehortua

Trisha has been working with Jaime King-Iseman of King Consulting on preference points and funding criteria for Prop 2. The application was submitted in December. Our score was 105 out of 160 which Jaime says is a good score. The decision for prop 2 awards is a process that starts by regions in the state, i.e. region 1, 2, etc. We are in region 1 which will be considered first. Trisha presents a letter outlining this process. OPSC has determined that this project qualifies for preference points as outlined below:

Low Income 37
Overcrowded School District 28
Non-Profit Entity 40
Existing District Facilities 0
Total 105

There were 116 applications. Award notices are supposed to go out in February. We should find out by March the latest if we got awarded money

We have \$4.2 million dollars in facility funding right now.

If we receive the additional 1 million from CUSD (Measure C). Then we would have \$5.2 million.

We applied for Prop 39 however the district does not have site options for us to move to. They did suggest a church that is next to a gas station that they are considering purchasing, but we would have to modify it to fit our needs at our own expense. An elementary school being right next to a gas station is a concern. We know that they do not have a site to house our school where we could reside together. We will most likely have to split our campus if we go this route. There is another option - we could place modules on our new property. It would cost around \$3.9 million to do the ground work necessary to prepare the site for modules. This would mean we start construction of the future site parking lot, plumbing, and electrical would be a part of preparing the site. Immediate work on acquiring permits would need to happen, We have the money to start this now. We can lease portables. Our architect ran the numbers for the leasing of modules.

Budget Breakdown

- Total available funding \$5.2million
- Soft costs (conservatively estimated at 25%): \$1.3million
- Site Work/Utilities: Includes full-sized parking lot and outdoor play area
- Remaining budget for building approximately \$1 million

Modular Building Strategy

- Recommended approach: Lease modular buildings
- Delivery Cost: Approx. \$17/sq ft for 24x40 classroom building. To be verified with Mobile Modular or a selected vendor of your choice. There is quite a lot of uncertainty in this number at this time.
- Flexibility to utilize hard surface space by strategically placing modular units.

Recommendations:

- Explore lease agreements with modular providers
- Confirm if the \$1million budget can cover initial building costs
- Consider overbuilding the outdoor play area to accommodate future expansion
- Maintain flexibility for future permanent building footprint

Getting the work done on the site would be a good move forward. We would have to extend until the fall. Susan discusses that we are talking with landlords about giving Enloe ½ of our current building to reduce our cost in rent. Enloe is willing to work with us. Leen Bro’s are proposing a contract for an increased amount than was discussed in person. We will be going back to them to discuss adjustments to the draft lease that we are reviewing tonight. Susan’s recommendation is to consider Trisha’s proposal to move to our new land. We want to make sure we can stay here until we are ready to leave. We talked to them about prop 39 and a different space provided by cusd -

Enloe doesn’t want to hurt our program. During the 2026-27 school year we will move to our new site if all goes the way we plan. We should be thinking about what we don’t need and getting rid of our stuff. Everything is a tenant cost in commercial properties.

We need to get started prepping our property. This is the recommendation and the mutual desire from board members. Motion to support the plans presented tonight to give facilities the thumbs up to move forward with looking into modules Vicki Laurel seconds

➤ Vote

Name	Yes	No	Abstain	Absent
Vicki Wonacott				
Laurel Hill-Ward				
Donna Kreskey				
Trisha Atehortua				
Lauren Cesca				

➤ Vote passes

3.2. Update Lease agreement 450 W East

Susan Domenighini

Lease that is proposed is not acceptable - 30 k per starting in Dec no increases until we move

Motion by Lauren

Second Donna

➤ Vote

Name	Yes	No	Abstain	Absent
Vicki Wonacott				
Laurel Hill-Ward				
Donna Kreskey				
Trisha Atehortua				
Lauren Cesca				

➤ Vote passes

4. CLOSED SESSION

4.1. Public Employment (§54957)

4.1.1. Interim Executive Director / Executive Director

Report out from closed session the board has instructed the director to move forward with interviews.

NEXT MEETING - Tuesday, January 20, 2026 at 6:00 PM

8. ADJOURNMENT

Minutes Taken By: Maggie Buckley

Approved by: _____ Date: _____

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CHARTER COUNCIL
REGULAR MEETING AGENDA
Tuesday, January 20, 2026 06:00 PM

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Meeting ID: 880 6990 1920

Passcode: 79EGKH

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AGENDA

OPEN SESSION - 6:00PM

1. OPENING

- 1.1.** Call Meeting to Order 6:06pm
- 1.2.** Roll Call of Council Members to establish a quorum

Name	Present	Absent
Vicki Wonacott		x
Laurel Hill-Ward	x	

Donna Kreskey	x	
Trisha Atehortua	x	
Lauren Cesca	x	

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, and Love of life itself. Let us remember that as many hands build a house, so many hearts build a school.

1.4. Agenda Modifications

Table 4.6.1 Pull 2.6 for discussion later in the meeting.

1.5. Audience to Address the Council

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2. CONSENT AGENDA

2.1. Approve Regular Meeting Minutes (December 2025)

2.2. Charter Impact Monthly Report Steve McClain

2.3. Cash Flow

2.3.1. Balance Sheet Detail

2.3.2. Warrants/Aged Payable

2.3.3. Actual to Budget Summary

2.4. Point of Sale Transactions/Check Register (December 2025)

2.5. Credit Card Statement (December 2025)

Laurel motion to approve the consent agenda - Lauren Cesca second

➤ Vote

Name	Yes	No	Abstain	Absent
Vicki Wonacott				x
Laurel Hill-Ward	x			
Donna Kreskey	x			
Trisha Atehortua	x			
Lauren Cesca	x			

➤ Vote passes

2.6. 7th grade Field Trip (Ashland Oregon) Move to 4.7 on the agenda

➤ Vote

Name	Yes	No	Abstain	Absent
Vicki Wonacott				x
Laurel Hill-Ward	x			
Donna Kreskey	x			
Trisha Atehortua	x			
Lauren Cesca	x			

➤ Vote passes

3. FACULTY

3.1. Faculty Report

Cheryl Grant
Emily Swanson

There is a lot going on right now so there is no visual report from the faculty this week. Emily presents about the upcoming winter concert on Friday. This year we are seeing a lot of collaboration between the classes requiring a great amount of coordination for rehearsals and this is fantastic. It's going to be a very good concert that will last about 1 ½ hours. We hope you can all be there.

4. BUSINESS

4.1. The Purge. We are cleaning out storage rooms and classrooms, purging items that we do not need. Susan shares the work being done to prepare for the move to the west side of the building.

4.1.1. Musical Instrument Purge

Emily Swanson

Emily provided a document with a list of instruments that will need to be passed on and details how we came to have a lot of this equipment. Some things can be repaired and stored. Other items must be let go.

Motion to approve the purge of instruments by Trisha Atehortua. Donna Kreskey second motion.

➤ Vote

Name	Yes	No	Abstain	Absent
Vicki Wonacott				x
Laurel Hill-Ward	x			
Donna Kreskey	x			
Trisha Atehortua	x			

Lauren Cesca	x			
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➤ Vote passes

- 4.1.2. Other items Susan Domenighini
 Susan discusses the plan for cleaning out storage rooms, sheds and spaces to make room for classrooms.
- 4.2. Charter Renewal Update Discussion
 Charter renewal binders are being put together for submission to the CUSD board tomorrow night, 6pm at Marigold school. Our school's Charter Presentation to the CUSD will be on February 18, 2026 the same time and venue. The Charter Presentation is the time we will need a strong show of participation from community members.
- 4.3. Move Plan Discussion
 Our move deadline date is February 15th. After this date Enloe will start the buildout. Lots of questions abound so we are answering them via Parent Square as we get more information. We may take a half day off to help with moving items as we get closer to this date.
- 4.4. Lease for 450 W East Ave Discussion/Action
 Updated lease is presented.
 Board members review the new lease. The deadline for us to vacate the building is February 2027. The board has some questions. There are significant changes to this lease such as building maintenance and parking lot designation.
 Motion to approve the lease with the clarification of section (g) "maintenance" under heading *Lessor's Expense*, and clarification on parking plan for front parking lot by Trisha Atehortua. Laurel Hill-Ward second motion.

➤ Vote

Name	Yes	No	Abstain	Absent
Vicki Wonacott				x
Laurel Hill-Ward	x			
Donna Kreskey	x			
Trisha Atehortua	x			
Lauren Cesca	x			

➤ Vote passes

- 4.5. SARC Discussion/Action
 The board reviewed this year's SARC.

Motion to approve the SARC by Trisha Atehortua. Second motion by Lauren Cesca.

➤ Vote

Name	Yes	No	Abstain	Absent
Vicki Wonacott				x
Laurel Hill-Ward	x			
Donna Kreskey	x			
Trisha Atehortua	x			
Lauren Cesca	x			

➤ Vote passes

4.6. Policy

4.6.1. Student Behavior Health Policy (New requirement from the state for 7-8)

4.6.2. Livescan Policy Update

Motion to approve the Livescan policy update by Trisha Atehortua.

Donna Kreskey second motion.

➤ Vote

Name	Yes	No	Abstain	Absent
Vicki Wonacott				x
Laurel Hill-Ward	x			
Donna Kreskey	x			
Trisha Atehortua	x			
Lauren Cesca	x			

➤ Vote passes

4.7. 7th grade field trip

Discussion/Action

Motion to approve the Dream proposal for 7th grade class field trip by Trisha Atehortua second by Donna Kreskey.

➤ Vote

Name	Yes	No	Abstain	Absent
Vicki Wonacott				x
Laurel Hill-Ward	x			
Donna Kreskey	x			
Trisha Atehortua	x			
Lauren Cesca	x			

➤ Vote passes

5. GOVERNANCE

5.1. Comprehensive School Safety Plan 2025-26

Susan Domenighini

This year's update to the safety plan is reviewed. There are no major changes. The workplace violence prevention plan was added. Motion to approve with the update to the school map by Trisha Atehortua. Laurel Hill-Ward second motion.

5.2. Facilities Committee Report

Trisha Atehortua

5.2.1. Measure C application

The Facilities Committee met last week. Prop 39 is currently being discussed with the district. We need a site from the district. We are short on time. Their deadline is February 1st to offer us a place to reside. CUSD is legally obligated to provide us with a space. We have asked about available portables and they said they do not have any. We did not specifically ask about the ones that Inspire has that they will no longer need. There will be an internal CUSD Facility team meeting this Thursday to look at options for us. The Facility Committee wants to move to the new site and be in modular buildings while we build our school. Trisha has reached out to a modular company that works with another company called *Kitchens To Go* about Modular buildings with kitchens. There are even classroom Modular buildings with built in bathrooms.

Modular buildings for administrative offices are also available.

The facilities team was brainstorming about all of these possibilities. Suggestions moving forward for what we need;

- Strong positive communication to our community is key
- Having a parent night to talk about the move to our new school site - late February

The big question right now is, the district has 10 days to give us a site. Do we wait or do we communicate that we are wanting to move to our own land? We do not want to potentially ruin our opportunity to get a good prop 39 offer. Susan says, they already know what they are going to offer us. The recommendation is to not do anything until after the meeting tomorrow night. Other board members say we should wait until CUSD offers us a site on February 2nd then we can discuss options with them for moving to our new site with modular buildings.

5.3. Finance Committee Report

Lauren Cesca

Everything passed and approved - Our revenue is above budget Expenses were above budget We reviewed everything that is in the packet tonight along with other items including the SARC and our Audit. We reviewed the lease and gave recommendations with the understanding that other changes were going to be made. We also talked about the move and we had a review of class accounts.

5.4. Attendance/ Behavior Susan Domenighini

Susan presented the behavior report for December.

6. ADMINISTRATION

6.1. Executive Director's Report Susan Domenighini

Restorative Practices Handbook - is being reviewed by Faculty and Staff.

Susan has met with the teachers and some classified staff to discuss intentions for next year.

This school is a huge blessing to this community. This is Susan's last meeting before retirement. Thanks for your leadership Susan from the board. You have pulled us out of a place that was complicated and we appreciate the dedication you have given to us and our school!

7. CLOSED SESSION

7.1. Public Employment (§54957)

7.1.1. Interim Executive Director / Executive Director Maggie Buckley

The Board made a decision to offer the Executive Director position to an individual.

NEXT MEETING - Tuesday February 17, 2026 at 6:00 PM

8. ADJOURNMENT 8:56pm

Minutes Taken By: Maggie Buckley

Approved by: _____ Date: _____

BLUE OAK CHARTER SCHOOL
450 W. East Avenue, Chico, CA 95926
(Room 24)
CHARTER COUNCIL
SPECIAL MEETING DRAFT MINUTES
Monday, January 26, 2026 06:00 PM

Join Zoom Meeting

<https://us06web.zoom.us/j/88300943259?pwd=b9sC44frmCEyaRwebSAMMboBs0P1em.1>

Meeting ID: 883 0094 3259

Passcode: pYh8a5

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AGENDA

OPEN SESSION - 6:00PM

1. OPENING

- 1.1. Call Meeting to Order 6:02pm
- 1.2. Roll Call of Council Members to establish a quorum

Name	Present	Absent
Vicki Wonacott	x	
Laurel Hill-Ward		x

Donna Kreskey	x	
Trisha Atehortua	x	
Lauren Cesca		x

1.3. Invocation - School Verse Read

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1.4. Agenda Modifications

No agenda modifications at this time.

2. GOVERNANCE

2.1. Modification to Prop 39 Process Schedule

Susan Domenighini

We went to the CUSD board meeting last week to ask for additional measure c funds. We communicated to them that if the funds were not given to us we would essentially be forced to do prop 39.

We do want to know what our options are as in what they are going to offer us for a facility but it is clear that we expect to be split into two separate campuses and we do not want that. We asked them if we could do a special meeting to present answers to the questions they had for us. They agreed to table the decision to grant funds to a special meeting on February 6th. We need the measure c funds to be available to draw within the next 12 months. They want assurances that we can stay until Feb 1, 2027 by showing them our lease agreement. They want to have estimated costs for the plan we are proposing. 30k rent is affordable but we would like this to be lower to rent modular buildings on the new site.

This from Kevin

The city of chico architectural standpoint will not like the visual of portables. If we go DSA through the state of California then we are exempt from city ordinances. The timeline is longer. More red tape. We want to meet again on 2-2-26 as a board to discuss the prop 39 offer.

Motion to approve the modification to prop 39. Donna second motion.

Lauren Cesca arrived at 6:07pm -

➤ Vote

Name	Yes	No	Abstain	Absent
Vicki Wonacott	x			
Laurel Hill-Ward				x
Donna Kreskey	x			
Trisha Atehortua	x			

Lauren Cesca	x			
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➤ Vote passes

3. BUSINESS

3.1. Games Surplus Equipment Sale

Amy HilQuist

Table the games surplus decision to sell surplus equipment to the next board meeting.

➤ Vote

Name	Yes	No	Abstain	Absent
Vicki Wonacott	x			
Laurel Hill-Ward				x
Donna Kreskey	x			
Trisha Atehortua	x			
Lauren Cesca	x			

➤ Vote passes

3.2. Public Employment (§54957)

3.2.1. Interim Executive Director / Executive Director Contract Review

Motion to approve the contract updates as outlined in the highlighted areas Trisha Atehortua. Lauren Cesca second motion.

➤ Vote

Name	Yes	No	Abstain	Absent
Vicki Wonacott	x			
Laurel Hill-Ward				x
Donna Kreskey	x			
Trisha Atehortua	x			
Lauren Cesca	x			

➤ Vote passes

NEXT MEETING - Tuesday, February 2, 2026 at 6:00 PM

8. ADJOURNMENT 6:50pm

Minutes Taken By: Maggie Buckley

Approved by: _____ Date: _____

DRAFT



Blue Oak Charter School

Monthly Financial Presentation – January 2026



January Highlights

Highlights

- Enrollment forecast 197, ADA forecast 174.
- Revenue forecast above budget **+\$158K**, increased grant funding.
- Expenses forecast above budget **\$409K**, increased expectation for payroll and rent.
- Forecast loss of **\$58K**, dependent on allocation of one-time grants and maintaining expenses.
- Cash ended month **\$680K**.

Compliance and Reporting

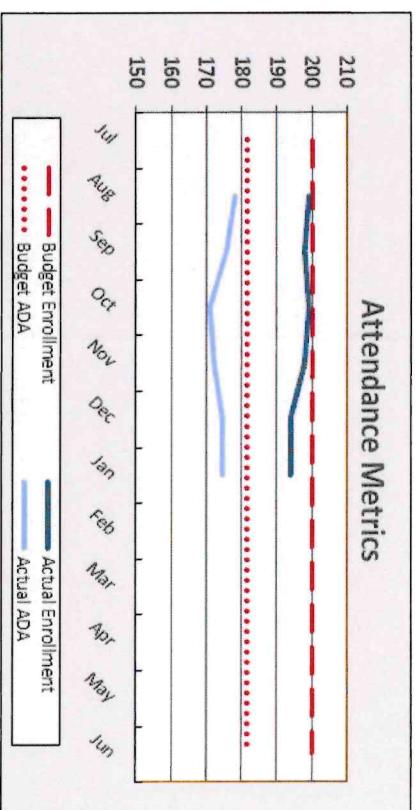
- Second Interim due to authorizer by March 15, 2026 (Results through January 31, 2026).



Attendance Data and Metrics

Enrollment and Per Pupil Data

Enrollment & Per Pupil Data			
	<u>Actual</u>	<u>Forecast</u>	<u>Budget</u>
Average Enrollment	197	197	200
ADA	174	174	182
Attendance Rate	88.5%	88.5%	90.9%
Unduplicated %	62.2%	62.2%	62.4%
Revenue per ADA		\$21,015	\$19,440
Expenses per ADA		\$21,630	\$18,380



Enrollment forecast of 197 is slightly below budget.

ADA forecast of 174 and attendance rate of 88.5% is slightly below budget.

Unduplicated Pupil% is also slightly below budget.

Revenue

- December Updates
- Forecast includes \$266K one-time funding (LREBG, AMIM).
- ELOP funding increased to \$254K.
- New grants available through FY28 and FY29, forecast addition \$31K annually.

	Year-to-Date			Annual/Full Year		
	Actual	Budget	Fav/(Unf)	Forecast	Budget	Fav/(Unf)
Revenue						
State Aid-Rev Limit	\$ 1,186,818	\$ 439,393	\$ 747,425	\$ 2,340,903	\$ 2,338,060	\$ 2,843
Federal Revenue	54,340	70,619	(16,279)	187,990	161,799	26,190
Other State Revenue	264,832	551,140	(286,307)	1,125,023	995,602	129,421
Other Local Revenue	10,557	14,592	(4,035)	38,740	38,740	-
Total Revenue	\$ 1,516,548	\$ 1,075,745	\$ 440,803	\$ 3,692,656	\$ 3,534,202	\$ 158,454

Expenses



- December Updates
- Forecast for utilities revised downward (\$10K).

Expenses	Year-to-Date			Annual/Full Year		
	Actual	Budget	Fav/(Unf)	Forecast	Budget	Fav/(Unf)
Certificated Salaries	\$ 861,401	\$ 846,081	\$ (15,320)	\$ 1,308,040	\$ 1,340,433	\$ 32,393
Classified Salaries	333,868	330,325	(3,543)	544,227	562,850	18,623
Benefits	339,522	236,070	(103,452)	552,917	397,426	(155,491)
Books and Supplies	115,210	91,600	(23,609)	167,630	167,629	(0)
Subagreement Services	105,879	88,286	(17,593)	175,534	186,800	11,267
Operations	154,532	119,938	(34,594)	176,787	187,025	10,239
Facilities	414,680	162,575	(252,105)	594,284	280,778	(313,506)
Professional Services	105,843	100,380	(5,463)	231,167	218,606	(12,561)
Depreciation	-	-	-	-	-	-
Interest	-	-	-	-	-	-
Total Expenses	\$ 2,430,935	\$ 1,975,256	\$ (455,679)	\$ 3,750,585	\$ 3,341,548	\$ (409,036)

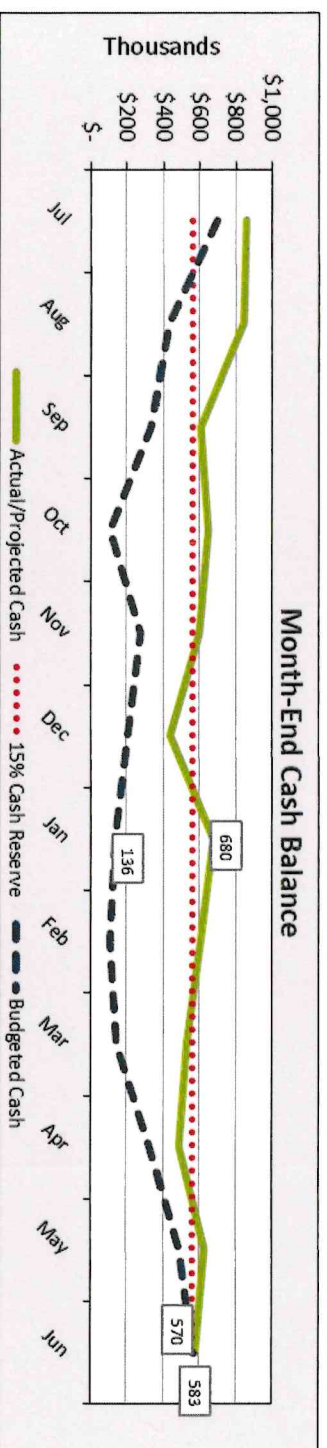
Surplus / (Deficit) & Fund Balance

- Maintaining revenue and expenses forecasts \$57K loss (with \$266K one-time funding.)
- Projected Ending Fund Balance of 13.3% is still above state required minimum level.

	Year-to-Date			Annual/Full Year		
	Actual	Budget	Fav/(Unf)	Forecast	Budget	Fav/(Unf)
Total Surplus(Deficit)	\$ (914,387)	\$ (899,511)	\$ (14,875)	\$ (57,929)	\$ 192,654	\$ (250,582)
Beginning Fund Balance	555,785	555,785		555,785	555,785	
Ending Fund Balance	<u>\$ (358,602)</u>	<u>\$ (343,726)</u>		<u>\$ 497,856</u>	<u>\$ 748,439</u>	
<i>As a % of Annual Expenses</i>	-9.6%	-10.3%		13.3%	22.4%	

Cash Balance

- Current cash \$680K.



Compliance Deadlines (next 60 days)



Area	Due Date	Description	Completed By	Board Must Approve	Signature Required	Additional Information
FINANCE	Board meeting before Feb 28	2025-26 LCAP Midyear Update - present a report on the annual update to the LCAP and the Budget Overview for Parents on or before February 28 of each year at a regularly scheduled meeting of the governing board of the LEA. The governing board is not required to adopt the mid-year update, however it must be presented to the governing board as part of a non-consent item. All available mid-year outcome data related to metrics identified in the current year's LCAP. There is no required template for the mid-year update.	Blue Oak with Charter Impact support	No	No	https://www.cde.ca.gov/leap/
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)(19)). 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.dor.ca.gov/equalization/lessor_exemption.html
FINANCE	Feb-15	Consolidated Application (ConApp) reporting (Extended due date) - 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/leap/26/cap/cap26/
FINANCE	Feb-20	Certification of the First Principal Appointment - The Principal Appointment 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 Appointment (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 Appointment calculations and establishes each LEA's monthly state aid payment for February through May.	FPI	No	No	https://www.cde.ca.gov/leap/26/cap/cap26/
DATA	Feb-27	CALPADS - Fall 2 deadline - Please be mindful that certification within CALPADS means that these data have been reviewed and approved by your superintendent or the administering agency and entered into CALPADS within the allotted reporting window. Results will result in enrollment, staff assignments, and English learner education services. Students, course enrollments, teacher course assignments, staff job assignments, FTE count and English Learner education services are reported datasets.	Charter Impact submitted by Client provided by Client	No	No	https://www.cde.ca.gov/leap/26/cap/cap26/
FINANCE	Apr-01 or sooner based on Authorizer	Audit Firm Selection - In accordance with Education Code (EC) Section 41020 (b) (3), if the governing board of a Local Educational Agency (LEA) does not have an audit contract in place by April 1, the County Superintendent of Schools, having jurisdiction over the LEA, shall provide for the audit and charge the LEA's fund for the cost incurred.	Blue Oak with Charter Impact support	Yes	No	https://www.legis.ca.gov/legislator/codes_titles/sections.html?sectionNumber=41020.&viewCode=FDZ
FINANCE	Set by Authorizer (by 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/leap/26/cap/cap26/
FINANCE	Mar-15	Every Student Succeeds Act Per-Pupil Expenditure Application - The Elementary and Secondary Education Act of 1986 (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/esas/
FINANCE	Mar-27	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	https://charterselectba.org/parent-services/business-services/
FINANCE	Apr-01	File a Form 700 - Statement of Economic Interests (SEI) - The requirement is part of the Political Reform Act enacted in 1974, which was passed by voters as a condition of being admitted to state and local government by helping agency decision makers avoid conflicts between their personal interests and official duties. Public officials, including LEAs and school-level per-pupil expenditures (PPE), certain charter school officers and employees may be required to file Statements of Economic Interests with a filing officer by the April 1 deadline.	Blue Oak	Yes	Yes	https://www3.dnc.ca.gov/filing700.html
FINANCE	Apr-15	Special Education Federal Expenditure Report #2 due to SELPA - Interim financial reporting for actuals through March 31 are due to SELPA.	Charter Impact	No	No	
FINANCE	Apr-30	Federal Cash Management - Period 4 - Title I, Part A; Title I, Part O, Subpart 2; Title II, Part A; Title III, EEP; Title III Immigrant; and Title IV Programs under the Elementary and Secondary Education Act of 1985 (ESEA), as amended by the ESSA, will utilize the Federal Cash Management Program. Charter schools that are awarded a grant under any of these programs must submit the CHDC report for a particular quarter in order to receive an appropriation for that quarter. CDE will appropriation funds to LEAs whose cash balance is below a certain threshold.	Charter Impact	No	No	https://www.cde.ca.gov/leap/26/cap/
FINANCE	Apr-30	Special Education ADA/Enrollment Report #3 due to SELPA - Report are due to El Dorado Charter SELPA.	Charter Impact	No	No	https://charterselectba.org/parent-services/business-services/

Appendices

As of January 31, 2026

- Cash Flow – Monthly and Annual Forecast
- Statement of Financial Position (Balance Sheet)
- Statement of Cash Flows
- Accounts Payable Aging
- Check Register

Blue Oak Charter School

Monthly Cash Flow/Budget FY25-26

Revised 02/06/26

ADA = 179.27



Original Budget Total Favorable/ (Unfav.)

ADA = 181.80

	Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26	Year-End Accruals	Annual Budget	Original Budget Total	Favorable/ (Unfav.)
Revenues																
State Aid - Revenue Limit																
8011	66,872	66,872	120,370	120,370	120,370	120,370	120,370	103,958	103,958	103,958	103,958	103,958	24,785	1,280,169	1,350,063	(69,894)
8012	-	-	-	-	-	-	123,635	-	-	204,418	-	119,407	-	447,450	362,166	81,284
8019	-	-	107	-	-	-	52,192	90,634	45,317	45,317	45,317	45,317	13,784	613,177	621,931	(8,754)
8096	66,872	66,872	120,477	120,370	291,793	224,242	296,192	194,592	149,275	353,693	149,275	268,681	38,569	2,340,903	2,338,060	2,843
Federal Revenue																
8181	-	-	-	-	-	-	-	6,456	6,456	6,456	6,456	37,405	31,755	31,755	23,634	8,121
8220	-	-	-	-	-	-	35,962	21,137	7,528	-	-	-	-	77,472	77,472	-
8290	-	-	-	-	-	-	-	-	-	-	-	-	-	57,099	45,024	12,075
8291	-	-	-	-	-	-	-	-	-	2,500	-	-	-	7,528	5,669	1,859
8296	-	-	-	-	-	-	-	-	-	-	-	-	-	10,000	10,000	-
8299	-	-	-	-	-	-	4,136	-	-	-	-	-	-	4,136	161,799	26,191
Other State Revenue																
8311	9,507	9,851	17,731	17,731	-	17,731	35,462	15,830	15,830	15,830	15,830	15,830	(0)	187,161	158,093	29,067
8520	-	-	-	-	-	12,827	19,072	5,854	5,854	5,854	5,854	14,934	-	70,249	70,249	-
8545	-	-	-	-	-	-	83,505	-	-	-	46,050	-	54,645	184,200	199,136	(14,935)
8550	-	-	-	-	-	-	4,065	-	-	-	-	-	-	4,065	3,775	290
8560	-	-	-	-	-	-	-	-	-	13,522	-	-	34,093	47,615	49,631	(2,017)
8598	2	-	-	-	-	-	83	-	-	-	-	-	-	855	855	-
8599	17,500	-	-	-	-	-	18,996	1,513	1,513	1,513	155,029	434,814	630,879	514,719	116,160	
Other State Revenue	27,009	9,851	17,731	17,731	-	30,558	161,953	23,197	23,197	36,719	222,763	465,577	88,738	1,125,023	995,602	129,421
Other Local Revenue																
8699	60	1,995	547	421	2,671	3,842	1,021	5,637	5,637	5,637	5,637	5,637	5,637	38,740	38,740	0
School Fundraising	60	1,995	547	421	2,671	3,842	1,021	5,637	5,637	5,637	5,637	5,637	5,637	38,740	38,740	0
Total Revenue	93,941	78,718	138,755	138,522	294,464	272,884	499,264	229,881	213,229	405,004	384,130	784,800	159,062	3,692,656	3,594,200	158,455
Expenses																
Certificated Salaries																
1100	70,232	109,936	114,675	108,993	101,230	103,983	106,787	103,584	103,584	103,584	59,393	-	-	1,085,981	1,045,110	(40,271)
1170	803	2,900	3,700	4,200	5,438	5,152	5,152	-	-	-	-	-	-	26,615	31,950	5,335
1175	200	200	-	-	-	200	1,300	-	-	-	-	-	-	1,800	6,750	4,950
1200	2,203	6,062	8,431	8,046	8,960	3,724	5,339	5,881	5,881	5,881	5,881	-	-	66,291	54,414	(11,877)
1300	10,698	10,698	10,698	10,698	10,698	10,698	10,698	10,594	10,594	10,594	10,594	10,594	127,853	142,210	14,357	
1900	84,135	129,796	137,504	131,337	126,326	123,027	129,275	120,059	120,059	120,059	75,868	10,594	-	1,308,040	1,340,433	32,393
Classified Salaries																
2100	798	10,584	17,813	17,566	20,399	11,944	12,996	15,423	15,423	15,423	15,423	-	-	153,794	119,765	(34,029)
2200	-	95	-	-	-	-	-	-	-	-	-	-	-	95	69,307	(4,941)
2300	6,187	6,187	6,187	6,187	6,187	6,187	6,187	6,187	6,187	6,187	6,187	6,187	74,248	170,383	(19,242)	
2400	18,205	17,089	18,989	18,270	20,569	13,775	13,817	13,817	13,817	13,817	10,399	-	-	189,625	203,395	76,930
2900	1,696	9,867	15,356	14,681	15,603	7,233	9,968	13,015	13,015	13,015	13,015	-	-	126,465	203,395	76,930
Other Classified Salaries	26,887	43,822	58,345	56,705	62,758	39,138	46,713	48,443	48,443	48,443	16,587	-	-	544,227	562,850	18,623
Benefits																
3101	12,524	23,216	23,782	22,640	21,977	22,574	22,932	21,419	21,419	21,419	13,535	1,890	-	229,328	58,384	(170,944)
3202	6,924	12,859	17,576	16,934	18,321	9,462	12,241	12,352	12,352	12,352	4,229	978	-	147,955	160,412	12,457
3301	1,670	3,108	4,302	4,163	4,253	2,786	3,318	2,857	2,857	2,857	978	-	-	36,004	27,900	(8,104)
3311	2,285	2,435	2,753	2,625	2,840	2,655	2,294	2,294	2,294	2,294	370	-	-	25,555	10,813	(14,542)
3401	8,288	4,960	7,435	6,697	7,199	5,812	9,917	9,917	9,917	9,917	9,917	9,917	102,762	115,360	12,598	
3501	44	84	95	90	91	78	83	224	112	56	56	56	-	14,116	14,116	-
3601	-	-	-	1,166	1,166	(2)	-	2,215	2,215	2,215	1,634	357	-	10,967	10,440	(527)
3901	-	-	-	-	(524)	-	-	-	-	-	-	-	-	(524)	397,426	(155,491)
30735	-	46,662	55,942	54,315	60,711	44,362	46,794	51,278	51,166	51,110	42,044	17,798	-	552,917	397,426	(155,491)
Books and Supplies																
4100	-	-	6,724	22,065	-	-	-	-	-	-	-	-	-	-	10,000	10,000
4200	3,138	-	-	-	-	-	-	632	632	632	632	632	-	35,090	3,090	(32,000)
4302	-	160	1,071	121	4,766	3,103	333	(33)	(33)	(33)	(33)	-	-	9,388	31,388	22,000
4305	1,650	1,939	-	-	3,889	258	-	615	615	615	615	-	-	10,811	10,811	-
4310	2,174	613	941	1,445	3,720	3,398	3,126	(283)	(283)	(283)	(283)	(283)	-	14,000	14,000	-
4311	-	122	-	-	-	-	812	(45)	(45)	(45)	(45)	-	-	750	750	-
4312	-	-	-	-	-	-	562	562	562	562	562	562	-	2,812	2,812	0
4312	-	-	-	-	261	49	-	650	650	650	650	650	-	3,558	3,558	0
4400	-	2,736	6,178	13,291	10,023	6,750	10,313	8,386	8,386	8,386	8,386	8,386	-	91,222	91,222	0
4700	6,962	5,571	14,914	36,963	22,659	13,558	14,583	10,484	10,484	10,484	10,484	10,484	-	167,639	167,629	(0)

Blue Oak Charter School

Financial Package

January 31, 2026

Presented by:



Blue Oak Charter School

Statement of Financial Position

January 31, 2026

	Current Balance	Beginning Year Balance	YTD Change	YTD % Change
Assets				
Current Assets				
Cash & Cash Equivalents	\$ 652,348	\$ 799,585	\$ (147,237)	-18%
Accounts Receivable	9,811	9,811	-	0%
Public Funding Receivables	303,941	717,498	(413,557)	-58%
Prepaid Expenses	13,328	57,650	(44,322)	-77%
Total Current Assets	979,428	1,584,544	(605,116)	-38%
Long-Term Assets				
Deposits	28,000	28,000	-	0%
Leased Asset	2,457,669	2,457,670	(1)	0%
Total Long Term Assets	2,485,669	2,485,670	(1)	0%
Total Assets	\$ 3,465,097	\$ 4,070,214	\$ (605,117)	-15%
Liabilities				
Current Liabilities				
Accounts Payable	\$ -	\$ 69,032	\$ (69,032)	-100%
Accrued Liabilities	510,919	318,813	192,106	60%
Deferred Revenue	785,475	571,961	213,514	37%
Other Current Liabilities	543,241	543,240	1	0%
Total Current Liabilities	1,839,635	1,503,046	336,589	22%
Long-Term Liabilities				
Other Long-Term Liabilities	2,011,383	2,011,383	-	0%
Total Long-Term Liabilities	2,011,383	2,011,383	-	0%
Total Liabilities	3,851,018	3,514,429	336,589	10%
Total Net Assets	(385,919)	555,785	(941,704)	-169%
Total Liabilities and Net Assets	\$ 3,465,099	\$ 4,070,214	\$ (605,115)	-15%

Blue Oak Charter School

Statement of Cash Flows

For the period ended January 31, 2026

	Month Ended 01/31/26	YTD Ended 01/31/26
Cash Flows from Operating Activities		
Change in Net Assets	\$ 95,736	\$ (941,705)
Adjustments to reconcile change in net assets to net cash flows from operating activities:		
Decrease/(Increase) in Operating Assets:		
Public Funding Receivables	120,370	413,558
Prepaid Expenses	(511)	44,323
(Decrease)/Increase in Operating Liabilities:		
Accounts Payable	(5,421)	(69,033)
Accrued Expenses	(50,110)	192,106
Deferred Revenue	52,894	213,515
Total Cash Flows from Operating Activities	212,958	(147,236)
Change in Cash & Cash Equivalents	212,958	(147,236)
Cash & Cash Equivalents, Beginning of Period	439,391	799,585
Cash and Cash Equivalents, End of Period	\$ 652,349	\$ 652,349

Blue Oak Charter School
Accounts Payable Aging

January 31, 2026

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

Total Outstanding Invoices \$ - \$ - \$ - \$ - \$ - \$ -

Blue Oak Charter School

Check Register

For the period ended January 31, 2026

Check Number	Vendor Name	Transaction Description	Check Date	Check Amount
7406	Leen Brothers	Leen Brothers	1/13/2026	\$ 60,000.00
7409	Leen Brothers	Leen Brothers	1/13/2026	10,000.00
12973	Advantage Therapy Services Inc	SpEd Svcs - 12/01/25 - 12/05/25	1/9/2026	3,919.50
12974	Certified/Fortress Security & Fire Systems	Security Svcs - 01/01/26 - 03/31/26	1/9/2026	330.00
12975	Comcast	Communication Svcs - 12/12/25 - 01/11/26	1/9/2026	5.37
12976	Cornell Distributing	Food Svcs - 10/25	1/9/2026	1,207.44
12977	David Sutherland	Reimb. - 12/12/25	1/9/2026	150.11
12978	Emily Swanson	Reimb. - School Supplies	1/9/2026	213.44
12979	Emma Todd	Reimb. - Meals - 12/09/25	1/9/2026	819.71
12980	Employers Preferred Ins. Co	Workers Compensation Ins - 07/01/25 - 07/01/26	1/9/2026	1,166.60
12981	Humana Insurance Co	Health Ins - 12/25	1/9/2026	1,601.51
12982	Jim Scheible	Consulting Svcs - 12/22/25	1/9/2026	5,000.00
12983	Kaufman Dolowich LLP	Legal Svcs - 11/25	1/9/2026	1,782.00
12984	Medical Air Services Association	Insurance - 12/25	1/9/2026	154.00
12985	Michelle Greene	Reimb. - Meals - 08/13/25	1/9/2026	1,871.62
12986	ODP Business Solutions LLC	Office Supplies	1/9/2026	361.49
12987	PG&E	Utility Svcs - 11/07/25 - 12/09/25	1/9/2026	5,841.78
12988	Sysco Food Services of Sacramento	Food Svcs	1/9/2026	2,052.41
12989	Upgraded Living	Advertising Svcs - 12/01/25	1/9/2026	295.00
12990	Maggie Buckley	Reimb. - 12/15/25 - 12/16/25	1/9/2026	119.72
12991	Advanced Document Concepts for Business	Sales Tax	1/15/2026	332.65
12992	Advantage Therapy Services Inc	SpEd Svcs - 12/08/25 - 12/19/25	1/15/2026	7,517.25
12993	Blue Shield of California	Health Ins - 01/01/26 - 01/31/26	1/15/2026	272.00
12994	California State University Chico	EDUC Paid Intern Fall 2025	1/15/2026	1,300.00
12995	California Water Service	Utility Svcs - 11/11/25 - 12/11/25	1/15/2026	420.83
12996	Charter Impact, LLC	Payroll Svcs - 01/26	1/15/2026	7,435.00
12997	Cheryl Grant	Reimb. - Office Supplies - 12/29/25 - 01/04/26	1/15/2026	475.50
12998	Chico Country Day School	Nursing Costs - 01/26	1/15/2026	1,848.10
12999	City of Chico	Utility Svcs - 11/29/25 - 12/28/25	1/15/2026	171.67
13000	Cornell Distributing	Food Svcs - 12/25	1/15/2026	850.49
13001	Department of Justice	Fingerprint Svcs - 11/25	1/15/2026	94.00
13002	Elizabeth Nail	Reimb. - School Supplies - 11/29/25 - 01/01/26	1/15/2026	104.04
13003	Maggie Buckley	Reimb. - Office Supplies - 01/04/26	1/15/2026	100.28
13004	North State Parent	Advertising Svcs - 01/26	1/15/2026	560.00
13005	Nourish Partners	Consulting Svcs - 01/26	1/15/2026	600.00
13006	Philadelphia Insurance Companies	Specialty & Training Ins - 12/25	1/15/2026	3,506.54
13007	Recology Butte Colusa Counties	Janitorial Svcs - 12/01/25 - 12/31/25	1/15/2026	919.85
13008	Sysco Food Services of Sacramento	Food Svcs	1/15/2026	2,066.15
13009	Voya Financial FBO CalSTRS Pension2	VOYA 403b April 2025 Payroll	1/22/2026	6,300.00
13010	Advanced Document Concepts for Business	Copier Lease - 09/01/25 - 09/30/25	1/29/2026	11.48
13011	Anthem Blue Cross	Health Ins - 02/01/26 - 03/01/26	1/29/2026	13,055.77
13012	Blue Shield of California	Health Ins - 02/01/26 - 02/28/26	1/29/2026	272.00

Blue Oak Charter School

Check Register

For the period ended January 31, 2026

Check Number	Vendor Name	Transaction Description	Check Date	Check Amount
13013	Butte County Office of Education	SpEd Svcs	1/29/2026	9,824.90
13014	City of Chico	Utility Svcs - 10/29/25 - 11/28/25	1/29/2026	171.67
13015	Comcast	Communication Svcs - 01/12/26 - 02/11/26	1/29/2026	383.35
13016	Department of Justice	Fingerprint Svcs - 12/25	1/29/2026	126.00
13017	Employers Preferred Ins. Co	Workers Compensation Ins - 07/01/25 - 07/01/26	1/29/2026	1,166.00
13018	J C Nelson Supply Co	Janitorial Supplies	1/29/2026	343.38
13019	Jolynn Aanenson	SpEd Svcs - 11/25 - 12/25	1/29/2026	4,972.50
13020	Luis Ortega	Reimb. - Meals - 01/15/26	1/29/2026	86.43
13021	Maggie Buckley	Reimb. - Office Supplies - 01/18/26 - 01/22/26	1/29/2026	112.53
13022	Medical Air Services Association	Insurance - 01/26	1/29/2026	168.00
13023	PG&E	Utility Svcs - 12/10/25 - 01/08/26	1/29/2026	5,892.75
13024	Sysco Food Services of Sacramento	Food Svcs	1/29/2026	4,136.21
13025	Tahoe Pure Water Co	Office Water	1/29/2026	35.75
EFT	T-Mobile	Communication Svcs - 12/10/25 - 01/09/26	1/2/2026	56.39
EFT	Verdant Commercial Capital	Verdant Commercial Capital	1/5/2026	264.39
EFT	Inova	Payroll Taxes 01/09/26	1/8/2026	4,648.84
EFT	Inova	Payroll Direct Deposit PPE010926	1/8/2026	18,287.56
EFT	American Express	CC Pmt 01/26	1/12/2026	2,233.54
EFT	CalPERS	PERS 12/25	1/14/2026	17,840.22
EFT	CalPERS	PERS 12/25	1/15/2026	200.00
EFT	CalPERS	PERS 11/25	1/15/2026	17,133.38
EFT	Verdant Commercial Capital	Verdant Commercial Capital	1/15/2026	327.75
EFT	Benefit Resource, Inc	Benefit Resource	1/16/2026	112.00
EFT	Verdant Commercial Capital	Verdant Commercial Capital	1/26/2026	163.88
EFT	Benefit Resource, Inc	Benefit Resource	1/27/2026	505.83
EFT	Inova	Payroll Taxes 01/26/26	1/27/2026	12.75
EFT	Inova	Payroll Direct Deposit PPE012626	1/27/2026	261.13
EFT	Inova	Payroll Taxes 01/28/26	1/28/2026	4.25
Total Disbursements				<u>\$ 234,576.68</u>

Board Policy

: Create a number in the 5000's

STUDENT BEHAVIORAL HEALTH REFERRAL POLICY

The Blue Oak Charter Council is committed to promoting academic success, safety, and the overall well-being of all students. Recognizing that behavioral health is an essential component of student learning and development, Blue Oak Charter School (the School) implements standardized protocols for student behavioral health referrals, developed in consultation with the School, community stakeholders, and School-linked behavioral health professionals.

Addressing the Needs of High-Risk Groups

The School recognizes the importance of ensuring equitable access to behavioral health supports for all students. This includes addressing the needs of high-risk student groups, including, but not limited to, the following:

- Students with disabilities, mental illness, or substance use disorders
- Foster youth and youth placed in out-of-home settings
- Homeless youth
- Students experiencing bereavement or loss of a close family member or friend
- Students for whom there is a concern due to behavioral health disorders, including common psychiatric conditions and substance use disorders such as opioid and alcohol abuse
- Lesbian, gay, bisexual, transgender, or questioning students

The School staff who oversee the mental and behavioral health needs of students are responsible for coordinating the implementation of these group-specific referral protocols, in collaboration with Special Education (IEP and 504), the Foster Youth Liaison, the Homeless Liaison, and School administrators. School leadership may also, in its discretion, identify additional student groups, such as English learners or recently immigrated students, if local data or partner input indicate increased behavioral health risks.

Student Privacy

The School complies with a variety of federal and state student data privacy laws and regulations in connection with this policy on referral protocols for addressing student behavioral health concerns and with its implementation.

Referral Protocols and Procedures

The following referral protocols and procedures will be followed by the School for behavioral health professionals and support services.

Needs Assessment

The Executive Director or designee shall conduct an annual needs assessment to identify behavioral health trends, review available resources, and identify service gaps within the School community.

The School will review referral volume, response times, and outcomes quarterly and submit the findings to the School's board of directors for continuous improvement.

Capacity Building

The School shall provide professional development on referral pathways and staff roles, clarify responsibilities among certificated and classified staff and maintain partnerships with school-lined behavioral health professionals and community providers.

Planning

The Executive Director, or designee, shall define referral pathways for crisis and non-crisis concerns, establish goals and assign responsible roles for each step in the referral process and enter into memoranda of understanding with external partners, where appropriate, to support referral handoffs and information-sharing.

Implementation

The School shall establish step-by-step procedures to initiate referrals, document concerns, notify parents/guardians consistent with law, triage level of need, link students to appropriate services and schedule follow-up checks.

Evaluation and Continuous Improvement

The School shall conduct an annual evaluation of referral protocols that includes data collection and analysis, input from staff, families, and community stakeholders, and targeted improvements based on results. Evaluation monitors outcomes such as median time to first contact, percentage of follow-ups completed within ten school days, referral closure rates, and results for the student groups identified in Education Code section 49428.2(b)(3).

A summary of results is reported to the Board of Directors annually to support transparency and continuous improvement.

Training

The School shall ensure that teachers of students in grades 7 and 8 receive training on student behavioral health. Training materials approved by the School shall include:

- How to identify appropriate contacts for behavioral health evaluation, services, or both evaluation and services, at both the school site and within the larger community; and

- When and how to refer students and their families to those services.

Optional elements may also include:

- Recognizing the signs and symptoms of youth behavioral health disorders.

This training must be given to 100 percent of certificated employees and 40 percent of classified employees who have direct contact with students in grades 7 and 8 at least once by July 1, 2029.

Authorization and Scope of Practice

In order to ensure that all school employees act only within the authorization or scope of their credential or license, the School shall:

- Provide training and guidance to staff, clarifying their roles in the referral process and the limits of their credentials or licenses.
- Direct employees to refer students to appropriately credentialed or licensed professionals when behavioral health concerns are identified.
- Maintain referral protocols that specify which staff positions are authorized to act at each stage of the referral process.
- Review job descriptions and assignments to confirm they align with credentialing and licensing requirements.
- Inform staff clearly that only licensed or credentialed professionals are permitted to diagnose or treat behavioral health conditions.

Consistent with Education Code sections 49428.1(b)(8) and 49428.2(b)(5), nothing in this policy shall be construed as authorizing or encouraging School employees to diagnose or treat youth behavioral health disorders unless they are specifically licensed and employed to do so.

Board Policy

Animals on Campus

Blue Oak Charter Council recognizes that animals can be an effective teaching aid, support instructional programs, and provide vital services to students, staff, and visitors with disabilities. In addition, instruction on the care and treatment of animals instills a sense of responsibility and promotes the humane treatment of living creatures.

A teacher may bring an animal to school or arrange for students in his/her class to bring an animal to school for instructional purposes or as a service animal upon written permission from the principal or designee and subject to reasonable health, safety, and sanitation precautions. Teachers shall be responsible for ensuring that animals are strictly controlled and that all such precautions are observed to protect both students and animals.

Individuals with disabilities may be accompanied by specially trained guide dogs, signal dogs, or service dogs on school premises or on school transportation. (Education Code 39839; Civil Code 54.2)

When any animal is brought into the class, the principal or designee shall provide written notification to all parents/guardians of students in the affected class, asking them to verify whether their child has any known allergies, asthma, or other health condition that may be affected by the animal's presence.

Blue Oak Charter School assumes no liability for the animals brought to school.



BLUE OAK SCHOOL

Monitoring Goals, Actions, and Resources for the 2025-26 Local Control and Accountability Plan (LCAP)

This template is intended for internal monitoring purposes only. The 2025-26 LCAP template and instructions should be consulted when completing required documents.

(6) (A) The superintendent of the school district shall present a report on the annual update to the local control and accountability plan and the local control funding formula budget overview for parents on or before February 28 of each year at a regularly scheduled meeting of the governing board of the school district. (B) The report shall include both of the following: (i) All available midyear outcome data related to metrics identified in the current year's local control and accountability plan. (ii) All available midyear expenditure and implementation data on all actions identified in the current year's local control and accountability plan.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Blue Oak School	Tim Drury Executive Director	timdrury@blueoakcharterschool.org (530) 879-7483 ext 2003

Goal 1

Goal Description

Goal #1: Provide a safe, healthy equity based environment focused on meeting the needs of the whole child as defined by Waldorf.

Expected Annual Measurable Objectives

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
1.1	Attendance Reports, positive attendance activities and rewards, student, staff and parent surveys, attendance plans, SSTs, IEP meeting notes	Chronic Attendance Rate 35.4% Overall attendance rate below % Chronic Attendance for SPED 47.4% Hispanic 37.7%	Chronic Attendance rate overall:31%, SPED 36.2% Hispanic 31.3%		Chronic Attendance continues to be a concern. We have not been able to set up additional days for credit recovery due to CalPads reporting concerns.	
1.2	Mental Health and Wellness data, Waldorf inclusive parent nights	Provision of wellness and mental health services develop measure	Number of students served by the Counselor. Number of friendship groups. Assessments tracked implementation statewide. Parent training for families		This work is proceeding and data will be available for the year end report	
1.3	Food offerings	Menu offerings of fresh and local products develop measure	Contracted Nutritionist		No Change	
1.4	Building Site, Facility and BOCC reports	Escrow completion funding and planning begun	Planning for new site continues		CUSD approved additional funding of approximately \$3,000,000. this allows Blue Oak to move to the established new site planned conservatively to move by 2/28/27	
1.5	Behavioral Expectations Educators Handbook data	Assessments by Project Elevate and review of Educators Handbook data	44% of student surveyed know the school rules 66% of staff surveyed know the school rules		Educators Handbook shows current year reduction of 12\$ as of December 2025	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
		Focus on the classroom level, Tier 1, implementation. Suspension rate 4.5%	71% of staff teach the rules, 43% have given out Blue Oak leaves 76% of students (grades) have received them			

Actions & Measuring and Reporting Results

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-Year Outcome Data	Other Data/Evidence (qualitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
1.1	Increasing Attendance Reviewing attendance rates, beginning to recognize positive attendance, and strengthening communication with parents for excused and unexcused absences in 23-24 has proven effective in reducing chronic attendance and increasing overall attendance in the 23-24 school year. Tier 1: Continue positive attendance practices Tier 2: Utilize Aeries to record the action on attendance. Tier 3: Create attendance Improvement Plans through the SST process to support students and families in addressing attendance barriers. Include attendance on the IEP notes page. Focus on the needs of multilingual learners	No Yes	Partially Implemented	attendance 89.27%	Positive Attendance Awards are in place	\$38,449.00	\$25,376
1.2	Schoolwide Mental Health supports To have a well-balanced mental health support system for all. Research shows teachers' anxiety, stress, depression, and burnout are highly prevalent anxiety. Mental Health for staff supports mental health for students. Students' mental health opens them and their classmates to learning.	No Yes	Partially Implemented	Wellness room continues PPS councilor work in place	Implementation of medical billing is not yet in place Community Building is on hold due to staff loss Support for staff has not improved	\$76,239.00	\$50,318

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-Year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
	Blue Oak will) Continue to employ a PPS-credentialed counselor for mental health working with individuals and groups. 2) Developing a school-based wellness counselor, student wellness room, and staff wellness space. 3) Implement medical billing to support staffing 4) Implement Community building practices for strong relationships 5) Assess, determine and implement mental health supports of staff.						
1.3	Food Program To improve the healthy options for school lunches, Blue Oak will continue to work on improving healthy but palatable food options, reduced within the parameters as understood. The following steps will be 1) Continue to test samples of healthy foods children will eat 2) Survey middle school and involve them in food choices 3) Look for avenues to include locally-grown food sources	No Yes	Partially Implemented	Blue Oak continues to work on healthier lunches no progress on more local food sources	Middle school children have not been surveyed	\$97,979.00	\$64,666
1.4	New Site Blue Oak will continue to work on completing the project and moving into the new site in Miriam Park. The new site will provide a more secure building and allow for a design and location conducive to Waldorf Pedagogy. 1) Develop a design based on the input of the community collected during the 2023-24 year utilizing the Facilities Committee 2) Complete the building phase	No Yes	Ongoing Implementation	Funding for new site received from CUSD Prop 2 applied for and in process of review	planning with Architects and completion of bond dollar project money in process		\$0

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-Year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
	3) Move into the building						
1.5	Behavioral Expectations Full implementation of Educators Handbook continued evaluation of data to build consistency	No	Fully Implemented	reduction of referrals by 12%	implementation of Restorative		\$0

Goal 2

Goal Description

To provide a strong academic and enrichment programs designed to meet the needs of the whole child through a combination of Waldorf Pedagogy and Common Core integrating supports for Special Educations and intervention needs.

Expected Annual Measurable Objectives

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
2.1	Waldorf & Common Core	Number of Specialties: 3, Waldorf-certified staff: 7, and Alliance Membership requirements completed: 0. Common Core implementation balance with Waldorf to be established	Adjustments to Master Schedule to increase time on ELA & Math		ELA experimnet did not show an increase in scores.K Reviews were done of how time was used. It was determined to return to a teacher controlled schedule. Liz Bevins met with faculty to revisit the Waldorf Core work. A plan and schedule was put in place to achieve compliance by the fall	
2.2	Continuing Expanded Learning Offerings	Establish baseline number of clubs and enrollment additional days in 2023-24 Student and parent surveys will establish baselines.	Continuation of ELOP increased offering on Thursday afternoon.		Offerings continue at a consistent level.	
2.3	Behavior improvement Math assessment and state testing improvement	Establish baseline # and type of behavior referrals, suspensions # Special Needs # Hispanic #low income Math scores both local and state.	Pilot of iReady math 1-5 well received improved for teachers by reduced prep time Test scores ELA decline 20.3 Math decline 20.8		Behavior shows a 12% decrease in referrals this year iReady math continues to be piloted this year.	
2.4	Improved attendance, test scores, and decreased behavior incidents through increased engagement Established	Establish a baseline for student engagement through curriculum and activities, and	Development of Fish Diagram by Advisory Council LREBG. Begin implementation of 4 year looping.		Student leadership is now an ELOP club. Students lead the citizenship assembly monthly	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
2.5	Behavior evaluation	reducing teacher burnout	Reduction in suspensions SEL implemented 1-8 Improvement Implementation data evaluation for Educator's Handbook		suspensions are at two students numerically. Restorative Practices is in process and are seeing results. Implementation of behavior modification is seeing results.	
		1) Work to strengthen relationships with SPED students and staff 2) Implement SEL curriculum and apply other practices with fidelity throughout the school 3) Establish a more detailed tracking system for students displaying high behavioral issues. 4) Complete training and implementation of Restorative Practices				

Actions & Measuring and Reporting Results

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-Year Outcome Data	Other Data/Evidence (qualitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
2.1	Waldorf Deliver standard core instruction through a robust and Waldorf-inspired pedagogy. Waldorf is a highly researched, proven, effective instructional pedagogy that engages the whole child in a developmentally appropriate way. This educational practice builds strong, resilient adults. Common core is through specific ELA and Math lessons and integrated into the daily block schedules.	No Yes	Partially Implemented	iREady results Reading 27% at or above Grade level 26% One grade level below 47% Two or more grade levels below Math 15% at or above grade level 33% one grade level below 51% two or more grade levels below	Blue Oak continues to show strength in Oral communication and critical thinking .	\$1,264,273.00	\$834,420

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-Year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
2.2	<p>Extended Learning To offer high-quality expanded learning opportunities and extend learning time, expanded learning was implemented during the 2023-24 school year. Research is mixed on the effectiveness of expanded learning on students' learning and engagement; however, at Blue Oak, we found increased engagement through clubs, a reduction of stress on families, and increased attendance during the day.</p> <p>1) Establish enrollment numbers for offerings 2) Track student daily attendance for attendance improvement 3) Survey to assess engagement and family input.</p>	No Yes	Fully Implemented			\$21,725.00	\$14,339
2.3	<p>Curriculum Implementation To adopt and effectively implement an SEL curriculum for all and a math curriculum for 1st-5th grades. Administration, faculty, and parents concerning a new Math Curriculum for 1st-5th grade. The current math curriculum is satisfactory and meets the state's expectations but has proven challenging to utilize in our Waldorf Model. In August of 2023, the lower grades faculty met and expressed the difficulty in implementation. A review committee was established, including administration, faculty, and parent representation, to review and choose the new curriculum. The math curriculum iReady will be piloted in 2024-25. Blue Oak has worked since 2022 to research the Social Emotional Learning Curriculum and agreed this year on two Curriculums K-5 will pilot 7 mindsets. 6-8 will pilot School Connect. Both are recommendations from and supported by the Butte County Office of Education.</p> <p>1) 2024-25 Purchase curriculum, provide professional development, complete full pilot</p>	No Yes	Partially Implemented	Full club, camp and morning drop off	Summer Science Camp will be reviewed for cost basis	\$38,475.00	\$31,927

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-Year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
	2) If successful, ask for board approval. 3) 26-27 full implementation						
2.4	Rigor and Engagement To provide intervention and extension programs and services supported by LREBGG funding continuing to address students recovering from COVID gaps related to ELA & Math. Begin implementation of 4 year loop to increase teacher focus on higher level curriculum while continue to build relationship.	No Yes	Fully Implemented	The four year loop has been established for next year Increased work on Waldorf pedagogy on math and ELA	See block plans and assessments	\$71,558.00	\$47,228
2.5	Behavior Behavior practices, if applied with fidelity reduce suspensions for all students. Blue Oak shows a consistently high suspensions among students in special education. Additional concerns show in Hispanic and white populations. Blue Oak will work to reduce Suspensions with the following steps. 1) Work to strengthen relationships with SPED students and staff 2) Implement SEL curriculum and apply other practices with fidelity through out the school 3) Establish more detailed tracking system for students displaying high behavior issues. 4) Implement Restorative Practices	No Yes	Partially Implemented	Implementation of Restorative Practices and communication through the Educator's Handbook inclusion of Merits for positive reinforcement	Reduction of referrals by 12%	\$81,897.00	\$54,052

Goal 3

Goal Description

To cultivate a nurturing school community that fosters diversity, strong relationships, open communication, and a sense of belonging among all students, families and staff members where every voice is valued and all stakeholders feel supported. The pillar of active family and community engagement is the primary aim of this goal.

Expected Annual Measurable Objectives

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
3.1	Percentage of families engaging in events and volunteerism	174 parents fairly evenly distributed across grade levels signed in as volunteers in 2023-24. 9 recorded hours	Increased records of volunteerism		See Data from parent square	
3.2	Number and /or Level of Community Connections	7 community partners averaging 2 connections each	Continued connection with same partners		Not able to continue due to staff loss	
3.3	Number and participation in Community Engagement events	Two per year. Establish baseline during 2024-25	Remained at two per year.		Not able to continue due to staff loss	
3.4	Increase variety of communication tools to better engage parents and guardians	The Primary Communication tool is Parent Square.	Improved communication through phone calling and front booths.		Not able to continue due to staff loss	
3.5	transportation numbers and attendance improvement	Purchase a 12-passenger van and develop staffing and budget to support transportation to and from school	Purchase of van		postponed due to timing of approval.	

Actions & Measuring and Reporting Results

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-Year Outcome Data	Other Data/Evidence (qualitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
3.1	Engaging Families To develop meaningful ways for families to connect with the staff and the school's mission/values. Substantial research supports the development of the Community School Partnership pillars. This Action supports the	No Yes	Planned	Not able to continue due to staff loss	Student engagement has increased through the use of Restorative Practices and Student Leadership Club	\$12,762.00	

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-Year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
	Active Family and Community Engagement pillar. Ensure that all students have access to inclusive, responsive, and welcoming schools. Authentically engage with families about education policies and resources. Increase transparency, and celebrate the whole school identity.						
3.2	Community Connections To partner with community organizations to coordinate support services and enrichment activities. Strong research supports the development of the Community School Partnership pillars. This Action supports the Active Family and Community Engagement pillar.	No Yes	Planned	no data	A parent representative offered support but was not able to follow through.. No further action has been taken.	\$13,762.00	\$0
3.3	Parent Contribution To expand opportunities for families to contribute their skills, perspectives and experiences. Strong research supports the development of the Community School Partnership pillars. This Action supports the Active Family and Community Engagement pillar.	No Yes	Planned	Parent Council has actively recruited volunteerism	Loss of the Community Partnership staff has made progress difficult	\$2,836.00	\$0

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-Year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
3.4	<p>Increased communication avenues</p> <p>Not all families communicate well through technology. Importance, excitement, and individualization are not always able to be expressed in tech. A return to more personal communication is a priority.</p>	No Yes	Planned	Dish with the Director meetings are held monthly			
3.5	<p>Transportation</p> <p>Transportation is a key issue for low income families who struggle getting their children school on time.</p>	No Yes	Planned	continued plan for transportation including staffing	This was planned for year end 25-26 but was not able to be implemented		

Impact to the Budget Overview for Parents

Item	As adopted in Budget Overview for Parents	Mid-Year Update
Total LCFF Funds	\$2,303,639	\$1,604,417
LCFF Supplemental/Concentration Grants	\$252,015	\$166,330