



Fundraising Report Through April 2022

Total 2021-22 Fundraising Goal: \$202,500

2021-2022 projected grant to the school: \$153,312

2021-2022 YTD *actual* grant to the school: \$104,474.64

The grant amount is equal to 80% of our Net Income for each year, as set in the MOU between the Foundation and the School.

Donations Received by Month [Source: Foundation Accounting]

Month	2017-2018 Year	2018-2019 Year	2019-2020 Year	2020-2021 Year	2021-2022 Year
July	\$ 10,868.36	\$ 8,383.21	\$ 10,989.33	\$ 4,233.67	\$ 4,561.51
August	\$ 15,409.62	\$ 8,652.51	\$ 21,194.89	\$ 12,566.54	\$ 7,658.32
September	\$ 12,892.50	\$ 23,645.47	\$ 16,006.07	\$ 13,829.33	\$ 3,933.77
October	\$ 19,718.56	\$ 11,717.19	\$ 11,153.66	\$ 7,199.23	\$7,962.98
November	\$ 16,616.22	\$ 17,345.91	\$ 12,510.24	\$ 8,827.93	\$23,746.23
December	\$ 15,892.75	\$ 21,067.03	\$ 23,091.80	\$ 17,168.88	\$19,597.50
January	\$ 28,411.15	\$ 25,915.16	\$ 33,871.50	\$ 13,955.94	\$56,795.13
February	\$ 24,635.87	\$ 15,592.43	\$ 15,300.49	\$ 13,240.35	\$8,327.05
March	\$ 93,079.22	\$ 84,452.77	\$ 99,049.54	\$ 11,267.57	\$8,878.44
April	\$ 10,531.03	\$ 14,613.46	\$ 10,726.98	\$ 12,928.62	\$14,611.86
May	\$ 16,081.63	\$ 13,789.51	\$ 18,265.65	\$ 54,223.26	
June	\$ 10,458.09	\$ 39,777.09	\$ 19,207.18	\$ 12,880.61	
Total	\$ 274,595.00	\$ 284,951.74	\$ 291,367.33	\$ 182,321.93	\$156,082.79

Variance From Last Year YTD: **+40,864.73**

Long-Term Capital Fund Ending Balance: Approx. \$108,758.68

LIVE OAK CHARTER SCHOOL
100 GROSS CONCOURSE PETALUMA, CA 94952 • (707) 762-9020

Minutes for the Regular Meeting of the Board of Directors Live Oak Charter School
June 14, 2022
6:00pm

Present:

Jessica Umphress, Board Director and Facilitator
Cortney Calahan, Board Secretary
Robert Bunce, Board Treasurer
Christopher Fox, Board Director
Stacy Ito, Board Director
Kristen Walter, Board Director (arrived 7:04 pm)
Justin Tomola, Executive Director
John Azzizzi, Business Manager

This meeting will be by teleconference pursuant to Executive Orders N-25-20 and N-29-20.

The Board of Directors (Board) and employees of Live Oak Charter School shall meet via the Zoom meeting platform. Members of the public who wish to access the Board meeting may do so at:

<https://us06web.zoom.us/j/85709649364?pwd=dIFTWGEzMmhmbHdZQUlydXpkaUVmQT09>

Meeting ID: 857 0964 9364 Passcode: 094404
One tap mobile +14086380968,,85709649364#,,,*,094404# US (San Jose)
+16699006833,,85709649364#,,,*,094404# US (San Jose)

Please be advised that the Sonoma County Public Health Officer issued social distancing recommendations for public meetings, available at:

<https://socoemergency.org/recommendation-of-the-health-officer-public-meetings/>

As discussed in Legal Update No. 15-2021 regarding recent amendments to the Brown Act and pursuant to AB361, local public agencies in Sonoma County may proceed to hold virtual meetings after September 30, 2021 without holding a separate meeting to make a determination that meeting in person would present imminent danger. For so long as the public health recommendations remain in effect, local public agencies should also plan to reconsider the circumstances of the emergency every 30 days and make appropriate findings to continue with virtual meetings.

Members of the public who wish to comment during the Board meeting may use the “raise hand” tool on the Zoom platform. Members of the public calling in will be given the opportunity to address the Board during the meeting. Individual comments will be limited to three (3) minutes. If an interpreter is needed for comments, they will be translated to English and the time limit shall be six (6) minutes. The Board may limit the total time for public comment to a

reasonable time. The Board reserves the right to mute or remove a participant from the meeting if the participant unreasonably disrupts the meeting.

Access to Board Materials: A copy of the written materials which will be submitted to the Board may be reviewed by any interested persons on the Live Oak Charter School's website along with the agenda following the posting of the agenda at least 72 hours in advance of this meeting.

Disability Access: Requests for disability-related modifications or accommodations to participate in this public meeting should be made 72 hours prior to the meeting by emailing kim.anderson@liveoakcharter.org. All efforts will be made for reasonable accommodations. The agenda and public documents can be modified upon request as required by Section 202 of the ADA

Mission & Program

To ensure the humanity and potential of its students through an education resonant with their unfolding awareness and capacities, and supportive of the full and integrated development of body, heart, and mind. LOCS provides a K-8 program inspired by Waldorf education to children and families of Petaluma and surrounding communities. Waldorf inspired education is a developmental approach to learning that cultivates the innate capacities of each child through age appropriate curriculum. Live Oak educates the whole child – head, heart, and hands, through an education that integrates each child's creative, intellectual, emotional, physical and social domains. Live Oak offers an interdisciplinary liberal arts program where art, music, and movement are integrated with core academic instruction. Exploration of the natural world, human culture, language and mathematics enlivens curiosity which is the foundation of intellectual growth, conceptual flexibility, empathy and sense of connectedness.

Live Oak Charter Board Norms

- *Be brief and respect others.*
- *Be prepared for board meetings by asking questions ahead of time and follow the "No Surprise Rule."*
- *Avoid hidden agendas and springing any surprises on other members.*
- *Focus on an agenda item until it is resolved or until a specified time has been reached to resume the resolution process.*
- *Give your full listening attention.*
- *Be open to challenge your own beliefs and ideas; Stay open to new ways of doing things.*
- *Success depends on participation – share ideas, ask questions, draw others out.*
- *Refrain from deriding other individuals' ideas. Strive to value all opinions.*
- *Work in the interest of all students.*
- *Own your mistakes.*
- *Celebrate success – take time to recognize small steps or progress toward goals.*
- *Don't interrupt.*
- *Express gratitude and appreciation.*

CALL TO ORDER

6:06pm

APPROVE THE AGENDA

RB motioned to approve agenda; CF seconded; ayes - RB, CF, SI, JU, CC

A. Public Comment on non-agenda items

(15 min)

- No public comment

This portion of the meeting is set aside for members of the public to make comments or raise issues that are not specifically on the agenda. The board cannot, by law, respond or take action on any issue not specifically on the agenda. Public Comment presentations are limited to three minutes per presentation and the total time allotted to non-agenda items will not exceed fifteen minutes.

B. Board Development

(20 min)

- No public comment

1. Election of three board members for terms starting 7/1/2022.
 - a. KW nominated Samantha Sheppard for a 2-year term to the board, expiring 6/30/2024; SI & RB seconded; ayes: JU, SI, RB, CC, CF
 - b. RB nominated Stacy Ito for a 2-year term to the board, expiring 6/30/2024; CF seconded; ayes: JU, SI, RB, CC, CF
 - c. SI nominated Jessica Umphress for a 2-year term to the board, expiring 6/30/2024; CF & RB seconded; ayes: JU, SI, RB, CC, CF

C. Reports

- No public comment

This portion of the meeting is set aside for delivery of information to the board/public. Board members may ask clarifying questions, but items are intended to be primarily informational.

1. Treasurer Report (Robert Bunce) (5 min)
 - a. Financials reviewed (see board packet for details)
2. Foundation Report (Jessica Umphress) (5 min)
 - a. Postponed until next meeting
3. Director's Update (Justin Tomola) (30 min)
 - a. Enrollment, End of Year Activities, Professional Development (math curriculum & PBIS, Equity & Inclusion), CASPP & STAR tests, and Covid-19 updated and reviewed (see board packet for details)
4. Long Term Facilities Team Update (Chris Fox, Kristin Walter) (5 min)
 - a. Update on Healthy Democracy and LO community participation in recent panel discussions.
 - b. The next steps include continuing to participate with HD panels and also reach out to other stakeholders in the community and continuing to promote LO.

D. Consent agenda

(5 min)

1. Public comment - none
2. RB moved to approve the consent agenda; CF seconded; ayes: JU, SI, RB, CC, CF

All matters listed under Consent Agenda are considered to be routine, and all will be enacted by one motion and vote. There will be no separate discussion of these items unless a Board member requests items to be removed from the Consent Agenda for separate action.

1. Board minutes for April 12, 2022, May 17, 2022 and June 2, 2022
2. Financials for May 2022

3. Plan to hold regular August 2022 board meeting using Zoom platform per AB 361

E. The Board will consider the following for approval

- No public comment

1. Declaration of need for fully qualified educators (Justin Tomola) (5 min)
 - a. Example form found in board packet
 - b. SI moved to approve the declaration of need for fully qualified educators; RB seconded; ayes: JU, SI, RB, CC, CF
2. Consideration and approval of Executive Director's contract (Robert Bunce) (5 min)
 - a. Contract read by RB
 - b. RB moved to approve Executive Director's contract; CF seconded; ayes: JU, SI, RB, CC, CF

F. The board will consider the following for discussion

1. 2021/2022 draft Budget Report (John Azzizzi) (30 min)
 - a. Report was screen-shared
 - b. May not have a FINAL budget til August
 - c. Potential known impacts to the budget:
 - i. COLA increases - increases from 5.33% in January to 6.56%
 - ii. LCFF Base Rate Increase - \$2.1 billion base increase in addition to COLA
 - iii. Transitional Kindergarten Supplement - In recognition of the ADA impact of requiring a 10:1 adult/student ratio for TK or mixed TK/K classes
 - iv. 2021-22 ADA Loss Hold-Harmless and/or Current year Attendance Rate Relief
 - v. Budget Year and beyond ADA Hold-Harmless
 - vi. Special Education - increase from \$715/ADA to \$820/ADA
 - d. New and Expanded Program Adjustments/Impacts
 - i. One-Time Discretionary Block Grant - \$8 billion to be allocated to all LEAs on a per pupil amount based on 21-22 ADA
 - ii. No CalSTRS/CalPERS rate buy-downs; rates will go back to "normal" levels
 - iii. Universal Meals Mandate
 - iv. Expanded Learning Opportunities Program - mandated program for grades TK - 6 to provide afterschool and intersessional opportunities and free tuition for eligible students
 - v. School Facilities Grant Program
 - vi. Deferred Maintenance
 - vii. Educator Training
 - viii. Other Programs
 - e. Reviewed of actual vs projected ADA effect on the budget
 - f. Reviewed 2021-25 State Budget Revenue Assumptions and Funding Scenario Analysis
 - g. Reviewed the 2022-23 Adopted Budget and MYP
 - i. Slight deficit of \$158,019 for 22-23 year
 - ii. One-time funding is expected to offset deficit
 - h. Board questions addressed

2. LCAP Public Hearing #3 (Justin Tomola)
 - a. LCAP reviewed (see packet for details)

(10 min)

G. Topics for consideration for future board meetings

Please email future agenda items for consideration to Justin.Tomola@liveoakcharter.org and jessica.umphress@liveoakcharter.org

H. ADJOURNMENT

9:13 pm



Live Oak Charter School

2022-23 Budget Report and Multi-Year Projection

Board Public Hearing: June 14, 2022
Board Adoption: June 28, 2022

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Budget Narrative and General Fund Analysis

Local Educational Agencies (LEAs) are required to adopt a budget prior to July 1 of each year in order to authorize the expenditure of funds. The proposed budget is only an initial blueprint for revenues and expenditures since the preparation of the adopted budget usually occurs before the state has enacted its budget, and before actual revenues and expenditures are known for the current year. Should the final State Budget Act terms differ materially from those upon which the LEA's budget was based it is a best practice for a Charter LEA to update, revise, and re-approve its budget at, or before, its first August board meeting which is generally within the 45-Day Revision window required of school districts. In addition, LEA's are required to periodically report their financial status. Interim Reports are submitted prior to December 15 and March 15 of each year to provide budget updates and financial reports based on actual experience through the date of the report; actual financial information is reported through October 31 and January 31 respectively.

Included in this report are proposed state budget guidelines and assumptions as provided by the County Office of Education and School Services of California. State revenue and other common assumptions were updated based on the guidance of the "The Common Message" published by the California County Superintendents Educational Services Association (CCSESA-BASC) and budget briefs prepared by the California Charter School Association (CCSA), the Charter School Development Center (CSDC) and Capitol Advisors Group, LLC. The Proposed Budget Report also contains financial summaries, multi-year projections and detailed financial reports relating to the estimated financial activity for 2021-22 through 2024-25 specific to the Live Oak Charter School (LOCS).

Mission

The goal of Live Oak Charter School is to ensure the humanity and potential of its students through an education resonant with their unfolding awareness and capacities, and supportive of the full and integrated development of body, heart, and mind.

Governor's Revised State Budget Proposal ("May Revision") and State Legislature Budget Priorities Blueprint [update: enacted as SB-154 on June 13]

Economic Outlook: Following the unprecedented state revenue growth over the last two years, state revenue forecasts have been increased since January's Budget Proposal to historically high levels leading to an expansion of available Prop 98 funding along with funding for additional programs and state educational priorities. The increased revenues in the May Revision result in \$19.6 billion more than projected in January under the Proposition 98 guarantee for grades TK-14 education over three years. However, there is also increased economic uncertainty for the longer term due to record rates of inflation, global supply chain disruptions, the war in Ukraine, ongoing pandemic risks, and a record number of years of economic expansion in California only briefly interrupted by the pandemic. So, while the near-term looks great the longer term can be more problematic as the state faces a potential 'fiscal cliff' as early as 23-24 according to the Legislative Analyst. In this environment, advisors are advocating for prudence and preparation for a likely economic downturn in future years.

Budget Process: While June 15 is the deadline for the Legislature to send a balanced budget to the Governor, many analysts are predicting that the budget submitted at that time will likely be changed significantly prior to final approval and signing of the 23-23 Budget Act on or before July 1st. Additional details and changes may not be available until final passage of the budget “trailer bills” which serve as the details to implement the budget. A complicating factor is that on June 1st the state legislature released its own joint *Legislative Version of the 2022-23 State Budget* which differs from the *May Revision* in several significant areas.

*Update: On June 13 the State Legislature approved their Legislative Version of the State Budget as **Senate Bill (SB) 154**. As discussed above and elsewhere in this report, there remain significant differences between the Governor’s and the Legislature’s budget plans. As such it is recommended that the school review and update its adopted budget and issue a revised budget within the 45-day window.*

It is most likely that the assumptions on overall funding levels, revenues and economic indicators in the May Revision will be reflected in the final budget, while specifics may vary significantly (e.g. amount of one-time funding vs. permanent LCFF base increases). The bottom line is that LEA’s, particularly Charter LEA’s, will have to develop and adopt their budgets without definitive information prior to passage of the final Budget Act.

May Revision Proposals:

Summarized below are some of the major components of the *May Revision* relevant to the school budget and operations. We have summarized the potential impact of these proposals and the differences from the Governor’s *January Budget Proposal* in the chart that follows this section and/or in other sections of this report.

Base LCFF/Programs

1. **COLA Increases:** The statutory Cost of Living Adjustment (COLA) for 22-23 increases from 5.33% in January to 6.56%. COLA rates for the MYP years also are increased from the January.
2. **LCFF Base Rate Increase:** \$2.1 billion base increase in addition to the COLA. SSC estimates the impact to be an additional 3.29% over and above the COLA, for a total base increase of ~9.85% for 22-23 LCFF funding over 21-22.
3. **Transitional Kindergarten (TK) Supplement:** In recognition of the ADA impact of requiring a 10:1 Adult/Student ratio for TK or mixed TK/K classes (a reduction in enrollment of 4 students per TK/K classroom) beginning in 23-24, the *May Revision* includes a supplement of \$2,813 per unit of TK ADA.
4. **2021-22 ADA Loss Hold-Harmless and/or Current Year Attendance Rate Relief (classroom-based LEA’s only):** The May Revision proposal includes \$463 million one-time Prop 98 funds for current year (21-22) adjustments. The proposal would fund the 2021-22 LCFF on the greater of: (a) Actual 2021-22 ADA, (b) Funded 2020-21 ADA or (c) a new formula based on pre-COVID absence rates. [Note: see (2) below – school districts already benefit from (a)/(b) – so these provisions are only new for Charter LEA’s].

5. Budget Year (and beyond) ADA Hold-Harmless: School districts have long-benefited from an ADA Hold-Harmless provision which funds them at the higher of current or prior year ADA. The *May Revision* continues to propose extending this formula to also include the prior three 3-year average ADA in the formula. As currently written, this would NOT apply to charter schools beyond 21-22. SB 579 (Allen) would extend the same formula it has proposed for 21-22 to the 22-23 fiscal year for all schools including charters. This bill is now in the Assembly and is still active. However, by the fact that this is not included in the June 1 *Legislative Version*, we expect that this bill will not be enacted.
6. Special Education: No major changes above the additional \$500 million proposed in the January Budget to raise the special education base rate. Base rate boosted by the 6.56% COLA. The 21-22 base rate was ~\$715/ADA; 22-23 is projected to be in the range of ~\$820/ADA. The El Dorado SELPA reports that the \$500 million boost along with other current budget discussions could potentially raise the rate to ~\$850/ADA.

New and Expanded Program Adjustments

7. One-Time Discretionary Block Grant: \$8.0 Billion to be allocated to all LEAs on a per-pupil amount based on 21-22 P-2 ADA. Estimates range \$1,350/ADA (CCSA) to \$1,500/ADA (LAO).
8. No CalSTRS/CalPERS rate buy-downs: There were no specific proposals to buy down STRS and/or PERS rates as had been funded in the 2019-20 and 2020-21 state budgets. STRS employer rates are slated to increase 12.8% (from 16.92% to 19.10%); PERS rates will increase 10.7% (from 22.91% to 25.37%).
9. Universal Meals Mandate: An additional \$611.8 million was added to increase meal reimbursement rates. This will not impact the school directly, but it will improve conditions for our food service provider (PCS). The school will still be required to serve two meals per day to all students.
10. Expanded Learning Opportunities Program (ELOP): The *May Revision* adds an additional \$400 million on top of the previous \$3.4 billion for a total of \$3.8 billion in 22-23. This is expected to bring the program up to “full” implementation in 22-23, providing \$2,500 per prior year TK-6 unduplicated pupil ADA (=TK-6 ADA x UPP). The school will be required to extend regular school days to 9 hours for the ELOP/After School Program and an additional thirty 9-hour days during “intersessional” periods (breaks, weekends, and summer). 22-23 will be a ‘trial-run’ year, with full compliance expected by 23-24.
11. School Facilities Grant Program: The *May Revision* adds \$1.8 billion additional funding to this grant program bringing the total to \$4.0 billion; it is expected that approximately \$200 million will be available for the charters. School district facilities funding continues to dwarf charter facilities funding on a scale of approximately 20 to 1. The Charter Facilities Grant is VERY difficult to obtain and includes an enormous amount of red tape.
12. Deferred Maintenance: In addition, the *May Revision* adds \$1.8 billion for deferred maintenance funding for school district sites. The school is not eligible for this funding.

13. Educator Training: The *May Revision* includes several training augmentations, with the most relevant being \$300 million for additional Educator Effectiveness Grant funding for STEM educator training and development.
14. Other Programs: Several other programs were added to the *May Revision* which will likely not impact the school.

Legislative Version of the 2022-23 State Budget / Other Pending Legislation

*Update: The Legislative Version was approved as **Senate Bill SB-154** on June 13*

As mentioned above, on June 1st the both houses of the state legislature released their own joint *Legislative Version of the 2022-23 State Budget* which differs from the *May Revision* in several significant areas. The *Legislative Version* compares with the *May Revision* as follows:

1. 16.2% LCFF Base Rate Increase: This equates to the 6.56% statutory COLA plus an additional 9.64% augmentation to LCFF Base Funding. In total, this is an increase of 6.35 percentage points above the level in the *May Revision*.
2. Approves the Transitional Kindergarten (TK) Supplement: Approves the changes included in the *May Revision* to the LCFF Funding formula and related 're-benching'.
3. Increases "Low-Income" Threshold: Raises the household income eligibility threshold from the current 185% of the federal poverty level to 250% and thereby, increase the number of low-income pupils who generate Supplemental LCFF grant funding.
4. Approves Hold-Harmless for Charter Schools (2021-22 only): Existing and proposed hold-harmless provisions would only apply to classroom-based charter schools for 21-22. Rejects the 21-22 Attendance Rate adjustment proposed in the *May Revision*. Even though this language is now included in both the *May Revision* and the *Legislative Version* we are not including this in the current version of the school's 7/1 Adopted Budget and will revisit this assumption when the school updates its budget at 1st Interim (or earlier).
5. Increases One-Time Discretionary Block Grant (renamed Learning Recovery Discretionary Block Grant): Increases the *May Revision* one-time funding amount by \$500mm (6.2%). We question whether the final budget will be able to fund BOTH the LCFF Base Rate Increase of 16.2% AND a one-time grant of >\$1,500/ADA, but include this in our analysis to tie out to the current budget proposals.
6. Reduced ELOP Funding for Tier 2 Schools: Reduces per TK-6 UPP funding levels from \$2,500 to \$1,500 per UPP ADA for Tier 2 schools, including NCS.

A detailed analysis of the various proposals and the approach adopted by the school is provided on the chart on next page, with additional narrative following.

2021-25 STATE BUDGET REVENUE ASSUMPTIONS - FUNDING SCENARIO ANALYSIS

ADA Comparison vs 2nd Int	<u>20-21</u>	<u>21-22</u>	<u>22-23</u>	<u>23-24</u>	<u>24-25</u>
- ADA AB 22-23	278.77	252.37	256.75	256.74	256.74
- ADA 2nd Int 21-22		<u>253.61</u>	<u>256.75</u>	<u>258.66</u>	
Variance		-1.24	0.00	-1.92	

26.40 ADA Hold-Harmless
20-21 vs 21-22

LCFF Revenue Comparison vs 2nd Int (3. COLA and ADA only)	<u>21-22</u>	<u>22-23</u>	<u>23-24</u>	<u>24-25</u>
- LCFF Revenue AB 22-23 Base	2,268,195	2,463,849	2,591,594	2,694,772
- LCFF Revenue 2nd Interim	<u>2,280,151</u>	<u>2,435,272</u>	<u>2,537,985</u>	
Variance	(11,956)	28,577	53,609	
Cumulative - MYP			70,230	

Base Funding (COLA & ADA only)

Scenario Analysis LCFF Revenue - May Revise / Legis. Version	<u>21-22</u>	<u>22-23</u>	<u>23-24</u>	<u>24-25</u>	Total
4. 21-22 Hold-Harmless (Option 2: PY funded ADA = +26.40 ADA)		\$ 238,019			Paid in 22-23
4. 21-22 Hold-Harmless (Option 3: CY ADA/19-20 Attendance Rate)		No impact			Rejected in Legis. Version
5. 22-23 Hold-Harmless (SB 579 - Allen)		3-yr avg -> +5.88 ADA in 22-23			Unlikely to pass
3. TK Supplement (\$2,813/ADA+COLA)		\$ 26,949	\$ 28,398	\$ 29,540	84,887 3.
2. LCFF Base Increase - May Revise (3.29% Augment)		76,040	\$ 79,831	\$ 83,066	238,937 2.
8. One-Time Discretionary Block Grant (\$1,500/ PY Actual ADA)		\$ 378,555			378,555 8.
- May Revision: 3-year Total				\$ 702,379	702,379 Total May Revise
LV.1. [Leg.Version] - 16.2% (Total) Base LCFF Increase (9.64% Augment)		\$ 222,838	\$ 234,521	\$ 243,719	701,078
- 3-year Total				\$ 701,078	
LV.3. [Leg.Ver.] - Increase Low Income Threshold					68,662
- Additional UPC (assume 20% increase in UPC)		11	11	11	
- Wgt Avg Supp \$\$ / UPC		\$ 1,982	\$ 2,088	\$ 2,172	
- Total Supp \$\$ Increase (est.)		\$ 21,802	\$ 22,968	\$ 23,892	
Note: Leg. Ver. Also includes (3) and (8) above from May Revise	3	\$ 26,949	\$ 28,398	\$ 29,540	84,887 3.
	8	\$ 378,555			378,555 8.
					1,233,182 Total Legis Vers
11./LV.6. Expanded Learning Opp Grant (\$1,500 per TK-6 ADA x UPP)					247,465 incl 21-22
- TK-6 ADA x UPP		43.53	43.75	44.37	
- \$\$	\$ 50,000	\$ 65,293	\$ 65,620	\$ 66,552	

Scenario Analysis Summary	21-22	22-23	23-24	24-25	Total
Memo: High Probability - Amounts included in 7/1 Adopted Budget Model					
- LCFF Revenue (May Revise: 3.29% Augment + TK Adder)		2,566,838	2,699,823	2,807,378	
- One-Time Discretionary Block Grant (May Revise)		378,555			702,379 Total Amt incl 7/1 AB
- ELOP Funding [Legis.Version]	50,000	65,293	65,620	66,552	

Medium Prob: Additional Amounts Potentially Available / Not incl in 7/1 AB:				Total
-a) Legis. Version: Add'l LCFF Base Funding (assumes O-T Grant included)	146,798	154,690	160,653	462,141
-b) 21-22 Hold Harmless	238,019	-	-	238,019

Other Items - Low/Med/ ? Probability (Not incl.)				
-c) Low Income Threshold Increase	21,802	22,968	23,892	68,662
-d) ELOP - Add'l Funding at \$2,500 May Revise Rate	43,529	43,747	44,368	131,643
Memo: Total ELOP Funding at \$2,500 / TK-6 UPP ADA	108,822	109,367	110,920	

State Revenue Assumptions included in the 7/1 AB

LCFF Base and One-Time Discretionary Funds: Per our analysis, the three-year total of the *May Revision* revenue proposals for the 3.29% augmented LCFF Base Grant and the One-Time Discretionary grant increases state funding is \$702,379 above the standard funding level—taking into account only ADA changes and the statutory COLA. The *Legislative Version's* three-year total comes out to \$1,233,182 over standard. Since education funding is governed by a state constitutional provision (Proposition 98) we expect the floor funding level of the final State Budget to be at least as proposed in the May Revision. The school has based its budget on this floor level of funding. From there we explore additional funding scenarios and determine what additional funds may be available above that base and how they may best be utilized by the school.

Hold-Harmless (21-22 only): Under the proposed formula, the school stands to recoup its 26.40 point drop in ADA from 20-21 (19-20 P-2) for an estimated \$238,019 in additional 21-22 LCFF revenue. We have excluded this revenue from our submitted budget but include it as a memo item at the end of our Board Financial Report should it actually be included in the final State Budget.

ELOP Funding: The school has included in its budget the lower \$1,500 rate (per TK-6 UPP ADA) as currently written into the *Legislative Version*.

Again, we expect there will material changes – positive ones as we hope – which will oblige us to update the budget accordingly.

Other Program Notes and Changes:

Expanded Learning Opportunity Program (ELOP) / After-School Program: During the school year, the school will begin implementation of the ELOP as an extension/enhancement of its current after-school program offering free tuition for TK-6 unduplicated pupils (UP) and also ensuring a minimum capacity to serve 50% of TK-6 UP in the program. The school is evaluating alternatives to offer the required 30 days of 'intersessional' (weekends, breaks, summers) programming required under the ELOP and is working with community partners to provide tuition-free access to intersessional programs for at least 50% of our TK-6 UP as one alternative. Depending on program funding levels, the school may be able to offer reduced fees to other families based on need.

Universal Transitional Kindergarten: Beginning in 22-23 the school will offer TK enrollment to the expanded 4-yr old age groups as laid out in the four-year state plan roll out. Supplemental TK LCFF income should help offset approximately 50% of the lost revenue impact due to the expected drop in Enrollment/ADA of 4 students due to the lower adult to student ratios (from 1:12 down to 1:10). The school has included in this budget to include all TK students in one-classroom in order to not lose an additional 4 enrollment slots.

Universal Meal Program: The school will continue to contract with Petaluma City Schools (PCS) as its Food Service Authority (FSA) to offer one free breakfast and lunch to all students whose families choose to receive them. The school is appreciative of this partnership and the support of its sponsoring district.

Budget Planning Factors and Assumptions

We have listed below the key planning factors issued by the Department of Finance and other key agencies used in the preparation of this report. We have used the recommendations of the SSC Financial Projection Dashboard where applicable:

<u>Planning Factors / Assumptions</u>	2021-22	2022-23	2023-24	2024-25	2025-26
Statutory COLA (DOF)	1.70%	6.56%	5.38%	4.02%	3.72%
Funded/Estimated COLA	5.07%	9.85%	5.38%	4.02%	3.72%
STRS Employer Rates	16.92%	19.10%	19.10%	19.10%	19.10%
PERS Employer Projected Rates	22.91%	25.37%	25.20%	24.60%	23.70%
Unemployment Insurance Rate	0.50%	0.50%	0.20%	0.20%	0.20%
Lottery – Unrestricted per ADA	\$163.00	\$163.00	\$163.00	\$163.00	\$163.00
Lottery – Prop. 20 per ADA	\$65.00	\$65.00	\$65.00	\$65.00	\$65.00
Mandated Block Grant: Charter K-8 / ADA	\$17.21	\$18.34	\$19.33	\$20.11	\$20.86
Enrollment	261	268	268	268	268
ADA	252.37	256.75	256.74	256.74	256.74
Certificated Emp FTE	13.97	14.93	15.90	15.90	tbd
Classified Emp FTE	12.27	14.46	13.49	13.49	tbd
Average Annual Projected Salary Increase	2.5%-3.4%	4.0%	3.0%-4.0%	1.5%-3.5%	tbd

REVENUE

ADA:

The school has conservatively estimated Enrollment and ADA to be at lower levels than experienced prior to the COVID outbreak (2019-20) but higher than 21-22 (+4.38 ADA; 1.7%) based on current applications and wait lists for 22-23. Overall the expectation is that ADA will remain relatively flat across the 3-year MYP period.

LCFF Revenue:

In addition to the statutory COLA of 6.56% the school has included the 3.29% augment for a total base LCFF increase of 9.85% over 21-22. We have also included the TK Supplement which is included in both the May Revise and SB-154. The net result is an increase of \$298.6K (13.1%) above 21-22 funding.

Other Federal & State Revenues:

In both 2020-21 and 2021-22 the school received significant one-time funding from CARES /ESSER, AB86, Educator Effectiveness, and UTK Planning grants. For 2022-23 The school is including the proposed One-Time / *Learning Recovery Discretionary Block Grant* of \$1,500 per prior year actual ADA (\$378.6K) which would represent a third year of significant one-time

funding \$59.8K (18.8%) above 21-22 state and federal amounts. Unused funds, as well as a continuing unrestricted surplus from prior years, will be carried over to fund Academic Coaching/RTI programs over the three-year MYP period. In this budget the school has attempted to stretch surpluses generated by one-time funding to cover the costs of fully funding 4 RTI aides (2.8 FTE, 22-23: \$144.1K sal and ben) over the three years. Should the 16.2% LCFF increase included in SB-154 become law, this particular issue is resolved. Otherwise, should funding conditions not continue to improve to the point where ongoing funding catches up to one-time funding it is expected that the school will have to downsize this effort in 25-26 or possibly earlier.

Lottery, Title I, and mandate grant funding are expected to be very slightly higher than 21-22.

ELOP funding is included at the lower SB-154 level.

Local Revenue:

Overall local revenue is budgeted to decrease \$200.1K driven primarily by the non-recurrence of one-time SBA funds received in 21-22 and lower After School program revenue offset by increased Live Oak Foundation (LOF) funding. The school has lowered projections of After School program fees to offset slots occupied by students eligible for funding under ELOP. The school has worked with the LOF to help it smooth out the flow of one-time funding. After having deferred grants from the LOF, the school is expecting to draw upon these funds beginning again in 22-23 unless there should be a more significant funding shift in the final State Budget Act.

EXPENDITURES

Overall expenditures are expected to increase (\$350.6K; 10.8%) in 22-23 due almost exclusively to an increase in Salary and Benefits costs (+\$386.5K; 13.1%) offset by decreases in Materials and Supplies (-\$10.3K; -11.1%) and Other Operating Expenses (-\$5.6K; -1.1%). Lower costs of Covid-related materials and services are partially offset by increased rent and the addition of ELOP contract costs.

Should the final State Budget Act include additional funding above the amounts included in this budget the school's board has set as a priority to re-evaluate the school's salary structure, particularly as relates to the school's teachers. Salary actions discussed below are what are currently included in this budget. Additionally, with this budget, the school has taken the approach of attempting to restructure and fully staff school aide and support roles at levels that will better support students, teachers, and school operations.

Certificated Salaries (+\$112.3K; 10.5%): As a result of AB 1505 passed in 2019, specialty teachers who previously did not require a credential (e.g. handwork, movement/games, and music) are now required to be credentialed. As such, in each of the years 21-22, 22-23, and 23-24 we had/have one teacher (0.965 FTE/yr; 22-23: +\$67.2K) switching from a classified to a certificated role. Additionally, certificated base salaries increased by an additional schedule step resulting in an average increase of 4.0% (~\$45.0K).

Classified Salaries (+\$88.4K; +\$13.5K): Classified FTE is budgeted to increase a net of 2.2 FTE or a total of 3.15 FTE after considering the classified-to-credentialed switch discussed above. The budget adds a 0.75 FTE one-on-one SpEd aide, an additional 0.625 FTE ACT/RTI Aide, and a full

year of the 0.625 FTE handwork aide. There are fractional FTE increases for several employees as well as a restructuring of the enrollment and events coordinator roles into one higher level role with higher FTE and a restructuring of the school secretary role. The school has also restructured (long overdue) the classified aide salary schedule resulting in higher aide salary levels. Other classified staff received a base 4.0% salary increase.

Benefits/Payroll Taxes (+\$165.2K; +23.5%): As mentioned above, STRS employer rates are slated to increase 12.8% (from 16.92% to 19.10%); and PERS rates will increase 10.7% (from 22.91% to 25.37%). These increases, in addition to the increases in FTE result in a +\$101.2K (31.5%) increase in STRS and PERS costs. Health and Welfare costs are expected to increase \$55.6K (20.2%) primarily due to new hires and restructured roles being/becoming eligible for coverage under a school plan. For 23-24, the school is budgeting a \$100 (8.7%) monthly H&W contribution increase, raising the contribution level from \$1,150/mo. To \$1,250. The school last implemented a 15% increase of \$150 per month in 21-22.

RESERVES

The school continues to strive towards maintaining a strong financial base and ensure the long-term financial stability of the school. This is reflected in the school's goal to maintain a sufficient level of financial reserves. County offices of education and charter school advocacy organizations reinforce the need for reserves well in excess of the minimum reserve for economic uncertainty. The required reserve for economic uncertainty represents only a few weeks of payroll for most schools. In a normal budget year, The Government Finance Officers Association (GFOA) recommends reserves, at minimum, equal to two months of average general fund operating expenditures, or about 17%. The Non-profit Operating Reserve Initiative (NORI) recommends a reserve level of 3 months or 25%. Because it does not have the same ready access to working capital as school districts (e.g. TRANS), the school's goal is to increase reserves at levels approaching the NORI recommendation appropriate to a non-profit while at least exceeding the GFOA recommendation.

We have budgeted 22-23 (26.9% reserve level) and 23-24 (18.7%) at reserve levels that fit within the school's general goals. For 24-25 (10.2%) the school is showing the same level of staffing as prior years to show what it will take from an ongoing funding perspective to staff the school at levels that its board and administration feel appropriate to the implement the full school program. Should no significant additional funding be included in the final State Budget Act the school will reconsider its projected staffing for 24-25 at its next budget revision in order to meet its reserve level goals.

Surplus/Deficit and Fund Balance

Due to the influx of one-time funding in the prior two years (20-21 and 21-22) and again expected in 22-23, the school has experienced surpluses in the prior years that will be rolled forward to cover deficits in the final two years of the MYP resulting in a small cumulative deficit of \$86.8K for the five-year period from 20-21 through 24-25.

The school is estimating the 2022-23 Unrestricted Ending Fund Balance to be \$964,076 or 26.9% of total 22-23 budgeted expenditures, equivalent to 3.23 months of average expenditures. This amount is above the 5% minimum reserve requirement, and within the school's reserve level goals as discussed above. The Unrestricted Net Position is above the 5%

reserve for economic uncertainty threshold for all three years covered in the MYP. We have discussed matters related to the 10.2% reserve level that we are currently showing for 24-25. Additionally, we have laid out several additional revenue scenarios (one of more of which we are hoping will be included in the final State Budget) summarized below:

Surplus / (Deficit)	185,085	(172,523)	(193,327)	314,729	204,310	24,737	(179,573)	(306,324)	(324,280)
Ending Fund Balance	852,622	680,100	486,768	803,650	1,007,960	1,032,697	24,737	726,373	402,093
- Less: Net Investment in Capital Assets	(16,368)	(8,785)	(7,028)	(5,271)	(8,560)	(5,722)	2,838	(2,884)	(1,802)
- Less EFB Restricted	(173,327)	(176,317)		(11,067)	(103,500)	(62,900)		(35,000)	(15,000)
Unrestr EFB / Net Position	662,927	494,998	479,740	787,312	895,900	964,076	68,176	688,490	385,291
% of Total Expenditures	23.0%	14.8%	15.3%	29.8%	27.7%	26.9%	-0.8%	18.7%	10.2%
# Mos Avg Exp	2.76	1.77	1.84	3.57	3.32	3.23	(0.10)	2.24	1.23
Memo: Restr Prop 39 Income/Exp	173,327	-	(173,327)						
Surplus / (Deficit) Excl Prop 39	11,758	(172,523)	(20,000)						
Cumulative Deficit (2017-2020) 3 yrs			(180,765)						
Cumulative Surplus/Deficit (2020-2025 Actual + Projected)									(86,828)
Cumulative Surplus/Deficit (2017-2025 Actual + Projected)									(267,593)
45-Day Budget Revision - Revenue Scenarios									
1. Final State Budget includes: 21-22 Hold Harmless (only)						238,019			
- Revised Surplus/Deficit	185,085	(172,523)	(193,327)	314,729	204,310	262,756		(306,324)	(324,280)
- Revised Cumulative Surplus/Deficit 17-18 through 24-25									(29,574)
- Revised Unrestricted Fund Balance						1,202,095		926,509	623,310
- Revised Unrestricted Fund Balance %						33.5%		25.1%	16.6%
2. FSB includes Legislative Version vs. May Revise (16.2% vs 9.85% LCFF Base Grant Increase)						146,798		154,690	160,653
- Revised Surplus/Deficit	185,085	(172,523)	(193,327)	314,729	204,310	171,535		(151,634)	(163,627)
- Revised Cumulative Surplus/Deficit 17-18 through 24-25									194,548
- Revised Unrestricted Fund Balance						1,110,874		989,978	847,432
- Revised Unrestricted Fund Balance %						31.0%		26.9%	22.5%
3. FSB includes BOTH (1) and (2)						384,817		154,690	160,653
- Revised Surplus/Deficit	185,085	(172,523)	(193,327)	314,729	204,310	409,554		(151,634)	(163,627)
- Revised Cumulative Surplus/Deficit 17-18 through 24-25									432,567
- Revised Unrestricted Fund Balance						1,348,893		1,227,997	1,085,451
- Revised Unrestricted Fund Balance %						37.6%		33.3%	28.9%
** Memo: Potential Funds Available for Additional School Priorities (Scenario 3: Both 1 and 2) - three year total									
- 25% Unrestricted EFB									940,123
** Additional funds available above 25% reserve balance									145,328
- 20% Unrestricted EFB									752,098
** Additional funds available above 20% reserve balance									333,352

Cash Flow / Working Capital

With its relatively strong unrestricted reserve position the school does not anticipate cash flow or working capital issues during the first two years of MYP period. The school will revise year three staffing projections should additional funding above what we have budgeted not materialize and recast 24-25 in order to meet the school's reserve goals. Cash flow reports are attached herein.

Overall Fiscal Condition of the School / Certification

With the steps the school has taken to achieve the budget positions presented in this report, the Live Oak Charter School is financially secure and on a firm footing. As discussed throughout this report, the school continues to take steps to operate within the means granted by federal, state, and local sources of income and achieve a cost structure that is sustainable within these limits. Overall, the school is projecting the ending fund balance for this budget year and the subsequent two years to be above the reserve levels needed for a positive certification.

Charter Number: 0382

To the chartering authority and the county superintendent of schools (or only to the county superintendent of schools if the county board of education is the chartering authority):

2022-23 CHARTER SCHOOL BUDGET REPORT: This report is hereby filed by the charter school pursuant to Education Code Section 47604.33(a).

Signed: _____
Charter School Official
(Original signature required)

Date: _____

Printed
Name: Justin Tomola

Title: Executive Director

For additional information on the budget report, please contact:

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Title

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Live Oak Charter School

Board Financial Report

2022-23 Adopted Budget & MYP

Obj	Account	2017/18 Actual	2018/19 Actual	2019/20 Actual	2020/21 Actual	2021/22 YE Est	2022/23 7/1 Bud	22-23 Bud vs PY Est	2023/24 MYP	2024/25 MYP
BAL	Beginning Fund Balance	667,537	852,623	680,095	488,921	803,650	1,007,960	204,310	964,076	688,490
REVENUE										
8011	LCFF: State Aid	671,143	856,064	893,586	718,194	754,947	1,072,595	317,648	1,183,939	1,269,526
8012	LCFF: EPA	91,869	55,532	55,754	55,754	83,072	51,350	(31,722)	51,348	51,348
8019	LCFF: PY Adjustments	56,588	271	(5,493)	65,905	-	-	-	-	-
8019	EPA,PY Adj			5,627	-	-	-	-	-	-
8096	In Lieu Of Property Tax	1,433,177	1,374,109	1,425,089	1,602,810	1,430,176	1,442,893	12,717	1,464,536	1,486,504
8096	In Lieu Of Property Tax - PY Adj	-	9,289	1,202	(65,904)	-	-	-	-	-
LCFF	LCFF Income	2,252,777	2,295,265	2,375,765	2,376,759	2,268,195	2,566,838	298,643	2,699,823	2,807,378
Fed	Other Federal Revenue			-	184,928	209,900	16,500	(193,400)	16,500	16,500
8550	Mandated Cost Reimbursements	45,978	56,034	4,681	4,700	4,798	383,668	378,870	4,963	5,163
8560	State Lottery Revenue	68,013	68,416	60,250	69,130	56,936	58,539	1,603	58,537	58,537
8590	All Other State Revenues	336,954	248,029	(8,373)	185,657	180,664	66,133	(114,531)	66,460	67,392
State	Other State Revenue	450,945	372,479	56,558	259,487	242,398	508,340	265,942	129,960	131,092
8634	Food Services Revenue			9,760	108	-	-	-		
8660	Interest Income	11,024	12,126	10,758	10,034	7,000	6,000	(1,000)	6,000	6,000
8677	Interagency Svcs Between LEA's		89,582	92,856	93,640	109,751	126,269	16,518	132,580	139,210
8689	All Other Fees-AfterCare Program	115,769	137,902	107,007	1,369	92,000	69,120	(22,880)	77,992	103,531
8699	All Other Local Revenues	235,510	272,453	284,295	31,274	510,458	317,700	(192,758)	317,700	232,500
8980	Contribute From Unstrctd Rev	-	-	-	0	-	-	-	-	-
Local	Local Revenue	362,303	512,063	504,676	136,425	719,209	519,089	(200,120)	534,272	481,241
REV	Total Revenue	3,066,025	3,179,807	2,936,999	2,957,600	3,439,702	3,610,767	171,065	3,380,555	3,436,211
EXPENDITURES										
1100	Teachers' Salaries - Regular	732,925	769,030	763,524	772,985	923,954	1,025,863	101,909	1,094,391	1,125,907
1130	Teachers' Extra Assignmnt/Stipends	8,000	12,300	10,000	23,100	7,000	15,800	8,800	10,800	10,800
1148	Teacher Substitutes	14,809	16,726	5,640	270	13,000	8,000	(5,000)	8,000	8,000
1300	Cert Suprvrs' & Admins' Sal	115,000	121,000	110,000	111,760	123,500	130,070	6,570	134,400	138,900
1xxx	Total Certificated Salaries	870,734	919,056	889,164	908,115	1,067,454	1,179,733	112,279	1,247,591	1,283,607
2100	Instructional Aides' Salaries	189,350	233,569	230,112	157,581	113,969	191,734	77,765	201,714	210,914
2130	Classified Stipends		1,150	1,500	5,100	750	-	(750)	-	-
2148	Instr Aides Subs - Schl Bus	4,349	4,641	1,428	-	450	500	50	500	500
2199	Instr Aides Oth Miscellaneous	12,533	21,243	8,895	702	2,200	4,000	1,800	4,000	4,000
2220	Classfd Hrly Operations/Custodial	5,543	5,460	3,549	-	-	-	-	-	-
2300	Classified Director	-	106,500	110,000	111,760	122,000	135,650	13,650	140,450	145,350
2400	Clerical & Office Salaries	156,443	172,256	161,022	160,320	207,203	248,773	41,570	254,705	262,371
2499	Clerical&office Other Misc.	-	-	-	-	425	-	(425)	-	-
2900	Other Classified Salaries	319,923	326,254	244,768	138,307	204,820	157,914	(46,906)	108,095	111,981
2960	Student Workers	-	619					-	-	-
2999	Other Class Sals Other Misc.	38,571	24,540	3,597	-	1,675	3,350	1,675	3,350	3,350
2xxx	Total Classified Salaries	726,712	896,232	764,870	573,770	653,492	741,921	88,429	712,814	738,466

Live Oak Charter School

Board Financial Report

2022-23 Adopted Budget & MYP

Obj	Account	2017/18 Actual	2018/19 Actual	2019/20 Actual	2020/21 Actual	2021/22 YE Est	2022/23 7/1 Bud	22-23 Bud vs PY Est	2023/24 MYP	2024/25 MYP
3101	Benefits - Strs / Certificated	115,532	137,238	139,446	134,503	168,207	197,940	29,733	199,258	205,065
3201	Benefits - Pers / Certificated	10,290	12,483	13,769	14,683	16,798	36,380	19,582	51,497	51,652
3202	Benefits - Pers / Classified	96,282	143,461	145,646	114,488	136,364	188,223	51,859	179,629	181,663
3311	Benefits - OASDI/ Certificated	4,031	4,365	6,343	4,068	4,546	7,465	2,919	12,670	13,018
3312	Benefits - OASDI/ Classified	43,765	53,833	45,491	33,517	38,655	44,419	5,764	44,195	45,785
3331	Benefits - Medicare / Cert.	11,886	12,556	12,055	12,335	15,478	16,122	644	18,090	18,612
3332	Benefits - Medicare / Class.	10,261	12,688	10,639	7,885	9,041	10,388	1,347	10,336	10,708
3401	H & W Benefits - Certificated	162,303	149,682	155,188	149,532	194,548	225,715	31,167	235,064	228,218
3402	H & W Benefits - Classified	83,093	102,282	94,042	83,379	80,657	105,117	24,460	116,944	116,944
3501	Benefits - SUI / Certificated	791	1,920	690	1,398	5,108	6,058	950	2,995	3,067
3502	Benefits - SUI / Classified	354	439	367	522	3,118	3,583	465	1,426	1,477
3601	Benefits - Wcomp/ Certificated	17,237	15,247	13,324	13,051	18,042	15,573	(2,469)	18,090	20,538
3602	Benefits - Wcomp/ Classified	14,390	14,787	11,320	8,205	11,038	9,794	(1,244)	10,336	11,815
3xxx	Total Benefits	570,215	660,981	648,321	577,566	701,600	866,777	165,177	900,530	908,562
1-3	Total Salary & Benefits	2,167,661	2,476,269	2,302,355	2,059,450	2,422,546	2,788,431	365,885	2,860,935	2,930,635
	Memo: % of Total Expenditures	75.2%	73.9%	73.6%	77.9%	74.9%	77.8%	2.9%	77.6%	77.9%
4110	Textbooks	860	5,141	135	-	-	500	500	500	500
4210	Books Other Than Textbooks	1,540	2,131	2,391	860	500	1,500	1,000	1,500	1,500
4300	Materials & Supplies	20,526	910	19,469	924	1,000	2,500	1,500	2,500	2,500
4310	Instructional Mat'ls & Supplies	27,244	28,674	16,212	13,974	16,600	25,950	9,350	25,950	25,950
4340	Computer Sftware & Related Exp	12,195	11,006	1,199	1,601	515	600	85	600	600
4350	Office Supplies	6,346	7,734	3,521	2,182	4,500	5,500	1,000	5,500	5,500
4353	Duplicating Costs	895	3,729	419	168	-	-	-	-	-
4370	Custodial Supplies	4,581	3,373	3,800	528	5,500	5,700	200	5,700	5,700
4390	Other Supplies	42,144	85,661	23,632	20,575	47,849	27,750	(20,099)	27,750	27,750
4400	Non-capitalized Equipment	4,098	6,541	4,798	35,488	15,860	12,000	(3,860)	19,000	8,000
4710	Food Purchases - Nutrition Prgms	1,540	2,131	9,990	253	550	550	-	575	600
4xxx	Total Books and Supplies	120,429	154,900	85,566	76,553	92,874	82,550	(10,324)	89,575	78,600
5200	Training, Travel, & Conferences	22,447	9,943	16,739	4,646	9,075	17,600	8,525	17,600	14,000
5300	Dues & Memberships	4,545	3,279	3,270	3,425	3,500	3,500	-	3,500	3,700
5450	Insurance Costs (Prop&Liab)	12,175	12,411	14,928	21,520	24,796	29,760	4,964	35,710	42,850
5520	Electricity/Utilities	30,011	27,257	28,375	15,883	36,000	36,000	-	37,440	38,940
5530	Water	12,605	10,460	15,894	15,515	16,500	16,500	-	17,160	17,850
5550	Janitorial and Cleaning					79,000	33,600	(45,400)	33,600	33,600
5560	Waste Disposal	4,583	5,630	4,431	4,080	7,800	8,000	200	8,200	8,410
5570	Pest Control					1,500	1,500	-	1,540	1,580
5590	Other Site Operations					5,000	4,500	(500)	4,610	4,730
5600	Rentals And Leases	195,652	203,789	195,578	160,673	188,648	210,208	21,561	215,716	221,238
5630	Repairs	5,018	22,163	204,671	474	5,500	7,500	2,000	7,500	7,500
5632	Copier Repairs, Ops, & Maintenance	3,513	2,349	1,179	-	500	500	-	500	500
5800	Other Svcs & Oper Expenditures	140,498	156,872	94,955	95,836	109,186	105,652	(3,534)	107,305	106,367
5817	SCOE Data Processing Charges	1,552	1,537	1,995	9,130	9,300	9,490	190	9,680	9,870

Live Oak Charter School

Board Financial Report

2022-23 Adopted Budget & MYP

Obj	Account	2017/18 Actual	2018/19 Actual	2019/20 Actual	2020/21 Actual	2021/22 YE Est	2022/23 7/1 Bud	22-23 Bud vs PY Est	2023/24 MYP	2024/25 MYP
5818	SCOE A/V Service	95	950	-	-	-	950	950	950	950
5821	Audit Costs	6,092	6,525	10,710	12,050	12,900	12,500	(400)	13,000	13,500
5823	Legal Costs	2,752	46,048	5,520	3,226	2,500	5,000	2,500	5,000	5,000
5825	Advertisement	1,211	999	362	1,179	1,200	1,500	300	1,500	1,500
5830	Professional/Consultant Svcs	-	49,037	-	2,375	-	1,000	1,000	1,000	1,000
5860	Other Employment Costs	-	1,902	106	132	500	500	-	500	500
5862	Fingerprinting Costs	2,175	2,236	1,386	156	1,650	2,250	600	2,250	2,250
5911	Telephone	6,329	6,841	6,220	2,510	3,400	3,450	50	3,520	3,590
5940	Internet & Online Services	3,127	3,629	14,404	10,378	13,150	13,500	350	13,500	13,500
5950	Postage	2,466	1,936	1,482	1,503	1,250	2,250	1,000	2,250	2,250
5xxx	Total Services and Contracts	456,846	575,793	622,205	364,690	532,855	527,210	(5,644)	543,531	555,175
6900	Depreciation Exp	7,585	7,583	1,757	1,757	2,117	2,838	721	2,838	1,081
7141	Transfers to District/Other LEA's	128,419	137,785	118,443	140,420	185,000	185,000	-	190,000	195,000
EXP	Total Expenditures	2,880,940	3,352,330	3,130,326	2,642,871	3,235,392	3,586,030	350,638	3,686,879	3,760,491
	Surplus / (Deficit)	185,085	(172,523)	(193,327)	314,729	204,310	24,737	(179,573)	(306,324)	(324,280)
	Ending Fund Balance	852,622	680,100	486,768	803,650	1,007,960	1,032,697	24,737	726,373	402,093
	- Less: Net Investment in Capital Assets	(16,368)	(8,785)	(7,028)	(5,271)	(8,560)	(5,722)	2,838	(2,884)	(1,802)
	- Less EFB Restricted	(173,327)	(176,317)		(11,067)	(103,500)	(62,900)		(35,000)	(15,000)
	Unrestr EFB / Net Position	662,927	494,998	479,740	787,312	895,900	964,076	68,176	688,490	385,291
	% of Total Expenditures	23.0%	14.8%	15.3%	29.8%	27.7%	26.9%	-0.8%	18.7%	10.2%
	# Mos Avg Exp	2.76	1.77	1.84	3.57	3.32	3.23	(0.10)	2.24	1.23
	Memo: Restr Prop 39 Income/Exp	173,327	-	(173,327)						
	Surplus / (Deficit) Excl Prop 39	11,758	(172,523)	(20,000)						
	Cumulative Deficit (2017-2020) 3 yrs			(180,765)						
	Cumulative Surplus/Deficit (2020-2025 Actual + Projected)								(86,828)	
	Cumulative Surplus/Deficit (2017-2025 Actual + Projected)								(267,593)	

Live Oak Charter School

Board Financial Report

2022-23 Adopted Budget & MYP

Obj	Account	2017/18 Actual	2018/19 Actual	2019/20 Actual	2020/21 Actual	2021/22 YE Est	2022/23 7/1 Bud	22-23 Bud vs PY Est	2023/24 MYP	2024/25 MYP
	Surplus / (Deficit)	185,085	(172,523)	(193,327)	314,729	204,310	24,737	(179,573)	(306,324)	(324,280)
	Ending Fund Balance	852,622	680,100	486,768	803,650	1,007,960	1,032,697	24,737	726,373	402,093
	- Less: Net Investment in Capital Assets	(16,368)	(8,785)	(7,028)	(5,271)	(8,560)	(5,722)	2,838	(2,884)	(1,802)
	- Less EFB Restricted	(173,327)	(176,317)	(11,067)	(11,067)	(103,500)	(62,900)		(35,000)	(15,000)
	Unrestr EFB / Net Position	662,927	494,998	479,740	787,312	895,900	964,076	68,176	688,490	385,291
	% of Total Expenditures	23.0%	14.8%	15.3%	29.8%	27.7%	26.9%	-0.8%	18.7%	10.2%
	# Mos Avg Exp	2.76	1.77	1.84	3.57	3.32	3.23	(0.10)	2.24	1.23
	Memo: Restr Prop 39 Income/Exp	173,327	-	(173,327)						
	Surplus / (Deficit) Excl Prop 39	11,758	(172,523)	(20,000)						
	Cumulative Deficit (2017-2020) 3 yrs			(180,765)						
	Cumulative Surplus/Deficit (2020-2025 Actual + Projected)									(86,828)
	Cumulative Surplus/Deficit (2017-2025 Actual + Projected)									(267,593)

45-Day Budget Revision - Revenue Scenarios

1. Final State Budget includes: 21-22 Hold Harmless (only)							238,019		
- Revised Surplus/Deficit	185,085	(172,523)	(193,327)	314,729	204,310	262,756		(306,324)	(324,280)
- Revised Cumulative Surplus/Deficit 17-18 through 24-25									(29,574)
- Revised Unrestricted Fund Balance						1,202,095		926,509	623,310
- Revised Unrestricted Fund Balance %						33.5%		25.1%	16.6%
2. FSB includes Legislative Version vs. May Revise (16.2% vs 9.85% LCFF Base Grant Increase)							146,798	154,690	160,653
- Revised Surplus/Deficit	185,085	(172,523)	(193,327)	314,729	204,310	171,535		(151,634)	(163,627)
- Revised Cumulative Surplus/Deficit 17-18 through 24-25									194,548
- Revised Unrestricted Fund Balance						1,110,874		989,978	847,432
- Revised Unrestricted Fund Balance %						31.0%		26.9%	22.5%
3. FSB includes BOTH (1) and (2)							384,817	154,690	160,653
- Revised Surplus/Deficit	185,085	(172,523)	(193,327)	314,729	204,310	409,554		(151,634)	(163,627)
- Revised Cumulative Surplus/Deficit 17-18 through 24-25									432,567
- Revised Unrestricted Fund Balance						1,348,893		1,227,997	1,085,451
- Revised Unrestricted Fund Balance %						37.6%		33.3%	28.9%
** Memo: Potential Funds Available for Additional School Priorities (Scenario 3: Both 1 and 2) - three year total									
- 25% Unrestricted EFB									940,123
** Additional funds available above 25% reserve balance									145,328
- 20% Unrestricted EFB									752,098
** Additional funds available above 20% reserve balance									333,352

2022-25 BUDGET ASSUMPTIONS - ENROLLMENT & ADA**22-23 Budget/MYP Projection**

	Actual				Projection		
Enrollment Actual/Projection: (Note 1)	18-19	19-20	20-21	21-22	22-23	23-24	24-25
TK	9	13	10	7	10	10	10
K (1-yr & 2-yr)	33	31	31	30	34	34	34
1	30	32	28	26	28	30	30
2	32	32	32	30	28	28	29
3	32	30	29	28	30	28	28
4	32	30	27	26	28	30	28
5	32	30	29	27	26	28	28
6	31	32	31	28	27	26	28
7	30	32	32	30	27	27	26
8	30	28	31	29	30	27	27
Total Enrollment	291	290	280	261	268	268	268
Actual/Projected ADA Rate (Note 2)	95.71%	95.83%	n/a	96.17%	95.80%	95.80%	95.80%

ADA - LCFF Assumptions		18-19	19-20	20-21	21-22	22-23	23-24	24-25
Enrollment (CalPADS Fall 1)		291	290	280	261	268	268	268
Unduplicated Pupil #		49	60	66	58	58	58	58
- % (One-Yr)		16.8%	20.7%	23.6%	22.22%	21.64%	21.64%	21.64%
ADA Actual / Estimate								
TK					6.47	9.58	9.58	9.58
				19-20 P2				
TK-3		131.78	132.64	132.64	117.52	124.54	124.54	125.50
4-6		90.73	89.16	89.16	78.36	77.60	80.47	80.47
7-8		55.32	56.97	56.97	56.49	54.61	51.73	50.77
Total ADA - LCFF		277.83	278.77	278.77	252.37	256.75	256.74	256.74
Change/Variance: Total ADA vs Pr Yr					-26.40	4.38	-0.01	0.00
% vs Pr Yr					-9.47%	1.74%	0.00%	0.00%

Note 1: Counts are as of CalPADS Census Day except for 21-22 which is as of the last day of P-2

Note 2: Past actuals are from P-2 reporting; Attendance Rate includes Independent Study ADA

22-23 Adopted Budget & MYP

Description	Object Code	2019-20 Actual	2020-21 Actual	2021-22 YE Est	2022-23 7/1 Bud	Var (\$) 7/1 vs YE Est	2023-24 MYP	2024-25 MYP
A. REVENUES	ADA	278.77	278.77	252.37	256.75	4.38	256.74	256.74
1. LCFF Sources								
State Aid - Current Year	8011	893,586	718,194	754,947	1,072,595	317,648	1,183,939	1,269,526
EPA State Aid - Cur Yr	8012	55,754	55,754	83,072	51,350	(31,722)	51,348	51,348
State Aid - Prior Years	8019	134	65,905	-	-	-		
In-Lieu of Property Taxes	8096	1,426,291	1,536,906	1,430,176	1,442,893	12,717	1,464,536	1,486,504
Total LCFF Sources		2,375,765	2,376,759	2,268,195	2,566,838	298,643	2,699,823	2,807,378
2. Federal Revenues						-		
Title I (3010)	8290		17,079	20,955	16,500	(4,455)	16,500	16,500
ESSER II (3212)	8290		54,076	(97)		97		
ESSER III (3213) [80%]	8290		6,608	90,303		(90,303)		
ESSER III (3214) [20%]	8290		-	24,228		(24,228)		
COVID GEER (3215)	8290		15,180	-		-		
AB86 - ESSER II (3216)	8290			24,590		(24,590)		
AB86 - GEER II (3217)	8290			5,644		(5,644)		
AB86 - ESSER III (3218)	8290			16,030		(16,030)		
AB86 - ESSER III LL (3219)	8290			27,633		(27,633)		
P-EBT Local Admin Grnt (5810)	8290			614		(614)		
ARP-HCY (5634)	8290			-	-	-		
COVID CRF (3220)	8290		91,985	-	-	-		
Total Federal Revenues		-	184,928	209,900	16,500	(193,400)	16,500	16,500
3. Other State Revenues								
Mandate Block Grant	8550	4,681	4,700	4,798	5,113	315	4,963	5,163
One-Time Discretionary Grnt	8550				378,555			
State Lottery Unres (1100)	8560	43,446	49,060	41,338	41,850	512	41,849	41,849
State Lottery Prop20/Restr (6300)	8560	14,255	21,297	16,485	16,689	204	16,688	16,688
State Lottery Unres - PY (1100)	8560	916	(611)	(607)		607		
State Lottery Prop20/Restr - PY (6300)	8560	1,633	(617)	(280)		280		
Exp Lrng Opp Program (2600)	8590			50,000	65,293	15,293	65,620	66,552
Univ PreK Planning Grant (6053)	8590			53,379		(53,379)		
Educator Eff: FY21-26 (6266)	8590			64,768		(64,768)		
COVID Prop 98 (7420)	8590		20,236	-		-		
AB86-In-Person Instr (7422)	8590		70,377	11,718		(11,718)		
AB86-Exp Learning Opp (7425)	8590		76,651	(41)		41		
AB86-Exp Learning Opp (7426)	8590		16,501	-		-		
SB740 Facilities Grant-PY (6030)	8590	(14,111)	1,024	-		-		
CAASPP/ELPAC Testing	8590	951	868	840	840	-	840	840
Other Categorical Programs	8590	4,787				-		
Total Other State Revenues		56,558	259,487	242,398	508,340	265,942	129,960	131,092
4. Other Local Revenues								
Meal Program Income	8634	9,760	108	-	-	-	-	-
Interest Income	8660	10,758	10,034	7,000	6,000	(1,000)	6,000	6,000
Consortium Fees (CBSC)	8677	92,856	93,640	109,751	126,269	16,518	132,580	139,210
AfterCare Revenue (CARE)	8689	107,007	1,369	92,000	69,120	(22,880)	77,992	103,531
Foundation Revenue (FUND)	8699	245,855	3,387	21,428	305,200	283,772	305,200	220,000
Grants (9038)	8699	20,000	17,591	15,630	2,500	(13,130)	2,500	2,500
Library Grant/Donation (LIBR)	8699	1,386	-	-		-		
Music Grant/Donation (MUSC)	8699	2,050	-	-		-		
RESIG Safety Grant (9090)	8699		-	-	-	-	-	-
Misc Revenue (incl WC ROI)	8699	15,004	10,296	10,200	10,000	(200)	10,000	10,000
PPP Proceeds (SPEC)	8699		-	463,200		(463,200)		
Total Local Revenues		504,676	136,425	719,209	519,089	(200,120)	534,272	481,241
5. TOTAL REVENUES		2,936,999	2,957,600	3,439,702	3,610,767	171,065	3,380,555	3,436,211
Memo: LCFF Supplemental Revenue (incl in 8011)		90,930	93,259	96,635	109,885	-	111,755	115,238
- LCFF Supp %		3.98%	4.08%	4.45%	4.47%	13,250	4.32%	4.28%

Description	Resource Codes	Object Codes	2021-22 Estimated Actuals	2022-23 Budget	Percent Difference
A. REVENUES					
1) LCFF Sources		8010-8099	2,280,151.00	2,566,838.00	12.6%
2) Federal Revenue		8100-8299	204,416.00	16,500.00	-91.9%
3) Other State Revenue		8300-8599	189,019.00	508,340.00	168.9%
4) Other Local Revenue		8600-8799	760,269.00	519,089.00	-31.7%
5) TOTAL, REVENUES			3,433,855.00	3,610,767.00	5.2%
B. EXPENSES					
1) Certificated Salaries		1000-1999	1,062,454.00	1,179,733.00	11.0%
2) Classified Salaries		2000-2999	658,517.00	741,921.00	12.7%
3) Employee Benefits		3000-3999	703,758.00	866,778.00	23.2%
4) Books and Supplies		4000-4999	116,725.00	82,550.00	-29.3%
5) Services and Other Operating Expenses		5000-5999	555,597.00	527,210.00	-5.1%
6) Depreciation and Amortization		6000-6999	1,757.00	2,838.00	61.5%
7) Other Outgo (excluding Transfers of Indirect Costs)		7100-7299,7400-7499	165,000.00	185,000.00	12.1%
8) Other Outgo - Transfers of Indirect Costs		7300-7399	0.00	0.00	0.0%
9) TOTAL, EXPENSES			3,263,808.00	3,586,030.00	9.9%
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENSES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B9)			170,047.00	24,737.00	-85.5%
D. OTHER FINANCING SOURCES/USES					
1) Interfund Transfers					
a) Transfers In		8900-8929	0.00	0.00	0.0%
b) Transfers Out		7600-7629	0.00	0.00	0.0%
2) Other Sources/Uses					
a) Sources		8930-8979	0.00	0.00	0.0%
b) Uses		7630-7699	0.00	0.00	0.0%
3) Contributions		8980-8999	0.00	0.00	0.0%
4) TOTAL, OTHER FINANCING SOURCES/USES			0.00	0.00	0.0%
E. NET INCREASE (DECREASE) IN NET POSITION (C + D4)			170,047.00	24,737.00	-85.5%
F. NET POSITION					
1) Beginning Net Position					
a) As of July 1 - Unaudited		9791	803,650.00	973,697.00	21.2%
b) Audit Adjustments		9793	0.00	0.00	0.0%
c) As of July 1 - Audited (F1a + F1b)			803,650.00	973,697.00	21.2%
d) Other Restatements		9795	0.00	0.00	0.0%
e) Adjusted Beginning Net Position (F1c + F1d)			803,650.00	973,697.00	21.2%
2) Ending Net Position, June 30 (E + F1e)			973,697.00	998,434.00	2.5%
Components of Ending Net Position					
a) Net Investment in Capital Assets		9796	8,560.00	5,722.00	-33.2%
b) Restricted Net Position		9797	104,724.00	64,124.00	-38.8%
c) Unrestricted Net Position		9790	860,413.00	928,588.00	7.9%
G. ASSETS					
1) Cash					
a) in County Treasury		9110	1,126,081.28		
1) Fair Value Adjustment to Cash in County Treasury		9111	0.00		
b) in Banks		9120	805.56		
c) in Revolving Cash Account		9130	6,000.00		
d) with Fiscal Agent/Trustee		9135	0.00		
e) Collections Awaiting Deposit		9140	0.00		
2) Investments		9150	0.00		
3) Accounts Receivable		9200	0.00		
4) Due from Grantor Government		9290	0.00		
5) Due from Other Funds		9310	0.00		
6) Stores		9320	0.00		
7) Prepaid Expenditures		9330	3,054.20		
8) Other Current Assets		9340	0.00		

Description	Resource Codes	Object Codes	2021-22 Estimated Actuals	2022-23 Budget	Percent Difference
9) Fixed Assets					
a) Land		9410	0.00		
b) Land Improvements		9420	0.00		
c) Accumulated Depreciation - Land Improvements		9425	0.00		
d) Buildings		9430	52,114.46		
e) Accumulated Depreciation - Buildings		9435	(42,609.44)		
f) Equipment		9440	0.00		
g) Accumulated Depreciation - Equipment		9445	0.00		
h) Work in Progress		9450	0.00		
10) TOTAL, ASSETS			1,145,446.06		
H. DEFERRED OUTFLOWS OF RESOURCES					
1) Deferred Outflows of Resources		9490	0.00		
2) TOTAL, DEFERRED OUTFLOWS			0.00		
I. LIABILITIES					
1) Accounts Payable		9500	103,284.40		
2) Due to Grantor Governments		9590	0.00		
3) Due to Other Funds		9610	0.00		
4) Current Loans		9640	0.00		
5) Unearned Revenue		9650	0.00		
6) Long-Term Liabilities					
a) Net Pension Liability		9663	0.00		
b) Total/Net OPEB Liability		9664	0.00		
c) Compensated Absences		9665	0.00		
d) COPs Payable		9666	0.00		
e) Leases Payable		9667	0.00		
f) Lease Revenue Bonds Payable		9668	0.00		
g) Other General Long-Term Liabilities		9669	0.00		
7) TOTAL, LIABILITIES			103,284.40		
J. DEFERRED INFLOWS OF RESOURCES					
1) Deferred Inflows of Resources		9690	0.00		
2) TOTAL, DEFERRED INFLOWS			0.00		
K. NET POSITION					
(G10 + H2) - (I7 + J2)			1,042,161.66		
LCFF SOURCES					
Principal Apportionment					
State Aid - Current Year		8011	807,860.00	1,072,595.00	32.8%
Education Protection Account State Aid - Current Year		8012	50,722.00	51,350.00	1.2%
State Aid - Prior Years		8019	0.00	0.00	0.0%
LCFF Transfers					
Unrestricted LCFF Transfers - Current Year	0000	8091	0.00	0.00	0.0%
All Other LCFF Transfers - Current Year	All Other	8091	0.00	0.00	0.0%
Transfers to Charter Schools in Lieu of Property Taxes		8096	1,421,569.00	1,442,893.00	1.5%
Property Taxes Transfers		8097	0.00	0.00	0.0%
LCFF/Revenue Limit Transfers - Prior Years		8099	0.00	0.00	0.0%
TOTAL, LCFF SOURCES			2,280,151.00	2,566,838.00	12.6%
FEDERAL REVENUE					
Maintenance and Operations		8110	0.00	0.00	0.0%
Special Education Entitlement		8181	0.00	0.00	0.0%
Special Education Discretionary Grants		8182	0.00	0.00	0.0%
Child Nutrition Programs		8220	0.00	0.00	0.0%
Donated Food Commodities		8221	0.00	0.00	0.0%
Interagency Contracts Between LEAs		8285	0.00	0.00	0.0%
Title I, Part A, Basic	3010	8290	16,164.00	16,500.00	2.1%
Title I, Part D, Local Delinquent Programs	3025	8290	0.00	0.00	0.0%
Title II, Part A, Supporting Effective Instruction	4035	8290	0.00	0.00	0.0%

Description	Resource Codes	Object Codes	2021-22 Estimated Actuals	2022-23 Budget	Percent Difference
Title III, Part A, Immigrant Student Program	4201	8290	0.00	0.00	0.0%
Title III, Part A, English Learner Program	4203	8290	0.00	0.00	0.0%
Public Charter Schools Grant Program (PCSGP)	4610	8290	0.00	0.00	0.0%
Other NCLB / Every Student Succeeds Act	3040, 3045, 3060, 3061, 3150, 3155, 3180, 3182, 4037, 4124, 4126, 4127, 4128, 5630	8290	0.00	0.00	0.0%
Career and Technical Education	3500-3599	8290	0.00	0.00	0.0%
All Other Federal Revenue	All Other	8290	188,252.00	0.00	-100.0%
TOTAL, FEDERAL REVENUE			204,416.00	16,500.00	-91.9%
OTHER STATE REVENUE					
Other State Apportionments					
Special Education Master Plan					
Current Year	6500	8311	0.00	0.00	0.0%
Prior Years	6500	8319	0.00	0.00	0.0%
All Other State Apportionments - Current Year	All Other	8311	0.00	0.00	0.0%
All Other State Apportionments - Prior Years	All Other	8319	0.00	0.00	0.0%
Child Nutrition Programs		8520	0.00	0.00	0.0%
Mandated Costs Reimbursements		8550	4,798.00	383,668.00	7,896.4%
Lottery - Unrestricted and Instructional Materials		8560	56,936.00	58,539.00	2.8%
After School Education and Safety (ASES)	6010	8590	0.00	0.00	0.0%
Charter School Facility Grant	6030	8590	0.00	0.00	0.0%
Drug/Alcohol/Tobacco Funds	6690, 6695	8590	0.00	0.00	0.0%
California Clean Energy Jobs Act	6230	8590	0.00	0.00	0.0%
Career Technical Education Incentive Grant Program	6387	8590	0.00	0.00	0.0%
Specialized Secondary	7370	8590	0.00	0.00	0.0%
All Other State Revenue	All Other	8590	127,285.00	66,133.00	-48.0%
TOTAL, OTHER STATE REVENUE			189,019.00	508,340.00	168.9%
OTHER LOCAL REVENUE					
Sales					
Sale of Equipment/Supplies		8631	0.00	0.00	0.0%
Sale of Publications		8632	0.00	0.00	0.0%
Food Service Sales		8634	0.00	0.00	0.0%
All Other Sales		8639	0.00	0.00	0.0%
Leases and Rentals		8650	0.00	0.00	0.0%
Interest		8660	8,500.00	6,000.00	-29.4%
Net Increase (Decrease) in the Fair Value of Investments		8662	0.00	0.00	0.0%
Fees and Contracts					
Child Development Parent Fees		8673	0.00	0.00	0.0%
Transportation Fees From					
Individuals		8675	0.00	0.00	0.0%
Interagency Services		8677	109,751.00	126,269.00	15.1%
All Other Fees and Contracts		8689	130,000.00	69,120.00	-46.8%
All Other Local Revenue		8699	512,018.00	317,700.00	-38.0%
Tuition		8710	0.00	0.00	0.0%
All Other Transfers In		8781-8783	0.00	0.00	0.0%
Transfers of Apportionments					
Special Education SELPA Transfers					
From Districts or Charter Schools	6500	8791	0.00	0.00	0.0%
From County Offices	6500	8792	0.00	0.00	0.0%
From JPAs	6500	8793	0.00	0.00	0.0%
Other Transfers of Apportionments					
From Districts or Charter Schools	All Other	8791	0.00	0.00	0.0%
From County Offices	All Other	8792	0.00	0.00	0.0%
From JPAs	All Other	8793	0.00	0.00	0.0%
All Other Transfers In from All Others		8799	0.00	0.00	0.0%

Description	Resource Codes	Object Codes	2021-22 Estimated Actuals	2022-23 Budget	Percent Difference
TOTAL, OTHER LOCAL REVENUE			760,269.00	519,089.00	-31.7%
TOTAL, REVENUES			3,433,855.00	3,610,767.00	5.2%
CERTIFICATED SALARIES					
Certificated Teachers' Salaries		1100	938,954.00	1,049,663.00	11.8%
Certificated Pupil Support Salaries		1200	0.00	0.00	0.0%
Certificated Supervisors' and Administrators' Salaries		1300	123,500.00	130,070.00	5.3%
Other Certificated Salaries		1900	0.00	0.00	0.0%
TOTAL, CERTIFICATED SALARIES			1,062,454.00	1,179,733.00	11.0%
CLASSIFIED SALARIES					
Classified Instructional Salaries		2100	125,529.00	196,234.00	56.3%
Classified Support Salaries		2200	0.00	0.00	0.0%
Classified Supervisors' and Administrators' Salaries		2300	122,000.00	135,650.00	11.2%
Clerical, Technical and Office Salaries		2400	207,203.00	248,773.00	20.1%
Other Classified Salaries		2900	203,785.00	161,264.00	-20.9%
TOTAL, CLASSIFIED SALARIES			658,517.00	741,921.00	12.7%
EMPLOYEE BENEFITS					
STRS		3101-3102	166,420.00	197,940.00	18.9%
PERS		3201-3202	157,556.00	224,603.00	42.6%
OASDI/Medicare/Alternative		3301-3302	67,261.00	78,394.00	16.6%
Health and Welfare Benefits		3401-3402	275,205.00	330,832.00	20.2%
Unemployment Insurance		3501-3502	8,229.00	9,641.00	17.2%
Workers' Compensation		3601-3602	29,087.00	25,368.00	-12.8%
OPEB, Allocated		3701-3702	0.00	0.00	0.0%
OPEB, Active Employees		3751-3752	0.00	0.00	0.0%
Other Employee Benefits		3901-3902	0.00	0.00	0.0%
TOTAL, EMPLOYEE BENEFITS			703,758.00	866,778.00	23.2%
BOOKS AND SUPPLIES					
Approved Textbooks and Core Curricula Materials		4100	500.00	500.00	0.0%
Books and Other Reference Materials		4200	1,500.00	1,500.00	0.0%
Materials and Supplies		4300	91,315.00	68,000.00	-25.5%
Noncapitalized Equipment		4400	22,860.00	12,000.00	-47.5%
Food		4700	550.00	550.00	0.0%
TOTAL, BOOKS AND SUPPLIES			116,725.00	82,550.00	-29.3%
SERVICES AND OTHER OPERATING EXPENSES					
Subagreements for Services		5100	0.00	0.00	0.0%
Travel and Conferences		5200	8,500.00	17,600.00	107.1%
Dues and Memberships		5300	3,500.00	3,500.00	0.0%
Insurance		5400-5450	24,796.00	29,760.00	20.0%
Operations and Housekeeping Services		5500	140,000.00	100,100.00	-28.5%
Rentals, Leases, Repairs, and Noncapitalized Improvements		5600	219,098.00	218,208.00	-0.4%
Transfers of Direct Costs		5710	0.00	0.00	0.0%
Transfers of Direct Costs - Interfund		5750	0.00	0.00	0.0%
Professional/Consulting Services and Operating Expenditures		5800	141,423.00	138,842.00	-1.8%
Communications		5900	18,280.00	19,200.00	5.0%
TOTAL, SERVICES AND OTHER OPERATING EXPENSES			555,597.00	527,210.00	-5.1%
DEPRECIATION AND AMORTIZATION					
Depreciation Expense		6900	1,757.00	2,838.00	61.5%
Amortization Expense—Lease Assets		6910	0.00	0.00	0.0%
TOTAL, DEPRECIATION AND AMORTIZATION			1,757.00	2,838.00	61.5%
OTHER OUTGO (excluding Transfers of Indirect Costs)					
Tuition					
Tuition for Instruction Under Interdistrict Attendance Agreements		7110	0.00	0.00	0.0%
Tuition, Excess Costs, and/or Deficit Payments					
Payments to Districts or Charter Schools		7141	165,000.00	185,000.00	12.1%
Payments to County Offices		7142	0.00	0.00	0.0%

Description	Resource Codes	Object Codes	2021-22 Estimated Actuals	2022-23 Budget	Percent Difference
Payments to JPAs		7143	0.00	0.00	0.0%
Other Transfers Out					
All Other Transfers		7281-7283	0.00	0.00	0.0%
All Other Transfers Out to All Others		7299	0.00	0.00	0.0%
Debt Service					
Debt Service - Interest		7438	0.00	0.00	0.0%
TOTAL, OTHER OUTGO (excluding Transfers of Indirect Costs)			165,000.00	185,000.00	12.1%
OTHER OUTGO - TRANSFERS OF INDIRECT COSTS					
Transfers of Indirect Costs		7310	0.00	0.00	0.0%
Transfers of Indirect Costs - Interfund		7350	0.00	0.00	0.0%
TOTAL, OTHER OUTGO - TRANSFERS OF INDIRECT COSTS			0.00	0.00	0.0%
TOTAL, EXPENSES			3,263,808.00	3,586,030.00	9.9%
INTERFUND TRANSFERS					
INTERFUND TRANSFERS IN					
Other Authorized Interfund Transfers In		8919	0.00	0.00	0.0%
(a) TOTAL, INTERFUND TRANSFERS IN			0.00	0.00	0.0%
INTERFUND TRANSFERS OUT					
Other Authorized Interfund Transfers Out		7619	0.00	0.00	0.0%
(b) TOTAL, INTERFUND TRANSFERS OUT			0.00	0.00	0.0%
OTHER SOURCES/USES					
SOURCES					
Other Sources					
Transfers from Funds of Lapsed/Reorganized LEAs		8965	0.00	0.00	0.0%
All Other Financing Sources		8979	0.00	0.00	0.0%
(c) TOTAL, SOURCES			0.00	0.00	0.0%
USES					
Transfers of Funds from Lapsed/Reorganized LEAs		7651	0.00	0.00	0.0%
All Other Financing Uses		7699	0.00	0.00	0.0%
(d) TOTAL, USES			0.00	0.00	0.0%
CONTRIBUTIONS					
Contributions from Unrestricted Revenues		8980	0.00	0.00	0.0%
Contributions from Restricted Revenues		8990	0.00	0.00	0.0%
(e) TOTAL, CONTRIBUTIONS			0.00	0.00	0.0%
TOTAL, OTHER FINANCING SOURCES/USES (a - b + c - d + e)			0.00	0.00	0.0%

Description	Function Codes	Object Codes	2021-22 Estimated Actuals	2022-23 Budget	Percent Difference
A. REVENUES					
1) LCFF Sources		8010-8099	2,280,151.00	2,566,838.00	12.6%
2) Federal Revenue		8100-8299	204,416.00	16,500.00	-91.9%
3) Other State Revenue		8300-8599	189,019.00	508,340.00	168.9%
4) Other Local Revenue		8600-8799	760,269.00	519,089.00	-31.7%
5) TOTAL, REVENUES			3,433,855.00	3,610,767.00	5.2%
B. EXPENSES (Objects 1000-7999)					
1) Instruction	1000-1999		1,784,027.00	1,986,706.00	11.4%
2) Instruction - Related Services	2000-2999		425,225.00	510,860.00	20.1%
3) Pupil Services	3000-3999		38,529.00	56,477.00	46.6%
4) Ancillary Services	4000-4999		0.00	0.00	0.0%
5) Community Services	5000-5999		126,129.00	159,413.00	26.4%
6) Enterprise	6000-6999		0.00	0.00	0.0%
7) General Administration	7000-7999		320,538.00	350,028.00	9.2%
8) Plant Services	8000-8999		404,360.00	337,546.00	-16.5%
9) Other Outgo	9000-9999	Except 7600-7699	165,000.00	185,000.00	12.1%
10) TOTAL, EXPENSES			3,263,808.00	3,586,030.00	9.9%
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENSES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B10)			170,047.00	24,737.00	-85.5%
D. OTHER FINANCING SOURCES/USES					
1) Interfund Transfers					
a) Transfers In		8900-8929	0.00	0.00	0.0%
b) Transfers Out		7600-7629	0.00	0.00	0.0%
2) Other Sources/Uses					
a) Sources		8930-8979	0.00	0.00	0.0%
b) Uses		7630-7699	0.00	0.00	0.0%
3) Contributions		8980-8999	0.00	0.00	0.0%
4) TOTAL, OTHER FINANCING SOURCES/USES			0.00	0.00	0.0%
E. NET INCREASE (DECREASE) IN NET POSITION (C + D4)			170,047.00	24,737.00	-85.5%
F. NET POSITION					
1) Beginning Net Position					
a) As of July 1 - Unaudited		9791	803,650.00	973,697.00	21.2%
b) Audit Adjustments		9793	0.00	0.00	0.0%
c) As of July 1 - Audited (F1a + F1b)			803,650.00	973,697.00	21.2%
d) Other Restatements		9795	0.00	0.00	0.0%
e) Adjusted Beginning Net Position (F1c + F1d)			803,650.00	973,697.00	21.2%
2) Ending Net Position, June 30 (E + F1e)			973,697.00	998,434.00	2.5%
Components of Ending Net Position					
a) Net Investment in Capital Assets		9796	8,560.00	5,722.00	-33.2%
b) Restricted Net Position		9797	104,724.00	64,124.00	-38.8%
c) Unrestricted Net Position		9790	860,413.00	928,588.00	7.9%

Resource	Description	2021-22 Estimated Actuals	2022-23 Budget
2600	Expanded Learning Opportunities Program	46,456.00	21,456.00
6266	Educator Effectiveness, FY 2021-22	58,268.00	42,668.00
Total, Restricted Net Position		104,724.00	64,124.00

Description	2021-22 Estimated Actuals			2022-23 Budget		
	P-2 ADA	Annual ADA	Funded ADA	Estimated P-2 ADA	Estimated Annual ADA	Estimated Funded ADA
C. CHARTER SCHOOL ADA						
Authorizing LEAs reporting charter school SACS financial data in their Fund 01, 09, or 62 use this worksheet to report ADA for those charter schools.						
Charter schools reporting SACS financial data separately from their authorizing LEAs in Fund 01 or Fund 62 use this worksheet to report their ADA.						
FUND 01: Charter School ADA corresponding to SACS financial data reported in Fund 01.						
1. Total Charter School Regular ADA						
2. Charter School County Program Alternative Education ADA						
a. County Group Home and Institution Pupils						
b. Juvenile Halls, Homes, and Camps						
c. Probation Referred, On Probation or Parole, Expelled per EC 48915(a) or (c) [EC 2574(c)(4)(A)]						
d. Total, Charter School County Program Alternative Education ADA (Sum of Lines C2a through C2c)	0.00	0.00	0.00	0.00	0.00	0.00
3. Charter School Funded County Program ADA						
a. County Community Schools						
b. Special Education-Special Day Class						
c. Special Education-NPS/LCI						
d. Special Education Extended Year						
e. Other County Operated Programs: Opportunity Schools and Full Day Opportunity Classes, Specialized Secondary Schools						
f. Total, Charter School Funded County Program ADA (Sum of Lines C3a through C3e)	0.00	0.00	0.00	0.00	0.00	0.00
4. TOTAL CHARTER SCHOOL ADA (Sum of Lines C1, C2d, and C3f)	0.00	0.00	0.00	0.00	0.00	0.00
FUND 09 or 62: Charter School ADA corresponding to SACS financial data reported in Fund 09 or Fund 62.						
5. Total Charter School Regular ADA	252.37	250.36	252.37	256.75	256.75	256.75
6. Charter School County Program Alternative Education ADA						
a. County Group Home and Institution Pupils	0.00					
b. Juvenile Halls, Homes, and Camps						
c. Probation Referred, On Probation or Parole, Expelled per EC 48915(a) or (c) [EC 2574(c)(4)(A)]						
d. Total, Charter School County Program Alternative Education ADA (Sum of Lines C6a through C6c)	0.00	0.00	0.00	0.00	0.00	0.00
7. Charter School Funded County Program ADA						
a. County Community Schools						
b. Special Education-Special Day Class						
c. Special Education-NPS/LCI						
d. Special Education Extended Year						
e. Other County Operated Programs: Opportunity Schools and Full Day Opportunity Classes, Specialized Secondary Schools						
f. Total, Charter School Funded County Program ADA (Sum of Lines C7a through C7e)	0.00	0.00	0.00	0.00	0.00	0.00
8. TOTAL CHARTER SCHOOL ADA (Sum of Lines C5, C6d, and C7f)	252.37	250.36	252.37	256.75	256.75	256.75
9. TOTAL CHARTER SCHOOL ADA Reported in Fund 01, 09, or 62 (Sum of Lines C4 and C8)	252.37	250.36	252.37	256.75	256.75	256.75

	Unaudited Balance July 1	Audit Adjustments/ Restatements	Audited Balance July 1	Increases	Decreases	Ending Balance June 30
Governmental Activities:						
Capital assets not being depreciated:						
Land			0.00			0.00
Work in Progress			0.00			0.00
Total capital assets not being depreciated	0.00	0.00	0.00	0.00	0.00	0.00
Capital assets being depreciated:						
Land Improvements			0.00			0.00
Buildings			0.00			0.00
Equipment			0.00			0.00
Total capital assets being depreciated	0.00	0.00	0.00	0.00	0.00	0.00
Accumulated Depreciation for:						
Land Improvements			0.00			0.00
Buildings			0.00			0.00
Equipment			0.00			0.00
Total accumulated depreciation	0.00	0.00	0.00	0.00	0.00	0.00
Total capital assets being depreciated, net excluding lease assets	0.00	0.00	0.00	0.00	0.00	0.00
Lease Assets			0.00			0.00
Accumulated amortization for lease assets			0.00			0.00
Total lease assets, net	0.00	0.00	0.00	0.00	0.00	0.00
Governmental activity capital assets, net	0.00	0.00	0.00	0.00	0.00	0.00
Business-Type Activities:						
Capital assets not being depreciated:						
Land			0.00			0.00
Work in Progress			0.00			0.00
Total capital assets not being depreciated	0.00	0.00	0.00	0.00	0.00	0.00
Capital assets being depreciated:						
Land Improvements			0.00			0.00
Buildings	46,708.00		46,708.00	5,406.00		52,114.00
Equipment			0.00			0.00
Total capital assets being depreciated	46,708.00	0.00	46,708.00	5,406.00	0.00	52,114.00
Accumulated Depreciation for:						
Land Improvements			0.00			0.00
Buildings	(41,437.00)		(41,437.00)	(2,117.00)	0.00	(43,554.00)
Equipment			0.00			0.00
Total accumulated depreciation	(41,437.00)	0.00	(41,437.00)	(2,117.00)	0.00	(43,554.00)
Total capital assets being depreciated, net excluding lease assets	5,271.00	0.00	5,271.00	3,289.00	0.00	8,560.00
Lease Assets			0.00			0.00
Accumulated amortization for lease assets			0.00			0.00
Total lease assets, net	0.00	0.00	0.00	0.00	0.00	0.00
Business-type activity capital assets, net	5,271.00	0.00	5,271.00	3,289.00	0.00	8,560.00

Budget, July 1
2021-22 Estimated Actuals
Schedule of Long-Term Liabilities

Description	Unaudited Balance July 1	Audit Adjustments/ Restatements	Audited Balance July 1	Increases	Decreases	Ending Balance June 30	Amounts Due Within One Year
Governmental Activities:							
General Obligation Bonds Payable			0.00			0.00	
State School Building Loans Payable			0.00			0.00	
Certificates of Participation Payable			0.00			0.00	
Leases Payable			0.00			0.00	
Lease Revenue Bonds Payable			0.00			0.00	
Other General Long-Term Debt			0.00			0.00	
Net Pension Liability			0.00			0.00	
Total/Net OPEB Liability			0.00			0.00	
Compensated Absences Payable			0.00			0.00	
Governmental activities long-term liabilities	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Business-Type Activities:							
General Obligation Bonds Payable			0.00			0.00	
State School Building Loans Payable			0.00			0.00	
Certificates of Participation Payable			0.00			0.00	
Leases Payable			0.00			0.00	
Lease Revenue Bonds Payable			0.00			0.00	
Other General Long-Term Debt	463,200.00		463,200.00		463,200.00	0.00	0.00
Net Pension Liability			0.00			0.00	
Total/Net OPEB Liability			0.00			0.00	
Compensated Absences Payable			0.00			0.00	
Business-type activities long-term liabilities	463,200.00	0.00	463,200.00	0.00	463,200.00	0.00	0.00

Budget, July 1
2021-22 Unaudited Actuals
LOTTERY REPORT
Revenues, Expenditures and
Ending Balances - All Funds

Description	Object Codes	Lottery: Unrestricted (Resource 1100)	Transferred to Other Resources for Expenditure	Lottery: Instructional Materials (Resource 6300)*	Totals
A. AMOUNT AVAILABLE FOR THIS FISCAL YEAR					
1. Adjusted Beginning Fund Balance	9791-9795	0.00		0.00	0.00
2. State Lottery Revenue	8560	40,731.00		16,205.00	56,936.00
3. Other Local Revenue	8600-8799	0.00		0.00	0.00
4. Transfers from Funds of Lapsed/Reorganized Districts	8965	0.00		0.00	0.00
5. Contributions from Unrestricted Resources (Total must be zero)	8980	0.00			0.00
6. Total Available (Sum Lines A1 through A5)		40,731.00	0.00	16,205.00	56,936.00
B. EXPENDITURES AND OTHER FINANCING USES					
1. Certificated Salaries	1000-1999	29,150.00		0.00	29,150.00
2. Classified Salaries	2000-2999	0.00		0.00	0.00
3. Employee Benefits	3000-3999	11,581.00		0.00	11,581.00
4. Books and Supplies	4000-4999	0.00		16,205.00	16,205.00
5. a. Services and Other Operating Expenditures (Resource 1100)	5000-5999	0.00			0.00
b. Services and Other Operating Expenditures (Resource 6300)	5000-5999, except 5100, 5710, 5800			0.00	0.00
c. Duplicating Costs for Instructional Materials (Resource 6300)	5100, 5710, 5800			0.00	0.00
6. Capital Outlay	6000-6999	0.00		0.00	0.00
7. Tuition	7100-7199	0.00			0.00
8. Interagency Transfers Out					
a. To Other Districts, County Offices, and Charter Schools	7211, 7212, 7221, 7222, 7281, 7282	0.00			0.00
b. To JPAs and All Others	7213, 7223, 7283, 7299	0.00			0.00
9. Transfers of Indirect Costs	7300-7399	0.00			0.00
10. Debt Service	7400-7499	0.00			0.00
11. All Other Financing Uses	7630-7699	0.00			0.00
12. Total Expenditures and Other Financing Uses (Sum Lines B1 through B11)		40,731.00	0.00	16,205.00	56,936.00
C. ENDING BALANCE (Must equal Line A6 minus Line B12)	979Z	0.00	0.00	0.00	0.00
D. COMMENTS:					

Data from this report will be used to prepare a report to the Legislature as required by Control Section 24.60 of the Budget Act.

*Pursuant to Government Code Section 8880.4(a)(2)(B) and the definition in Education Code Section 60010(h), Resource 6300 funds are to be used for the purchase of instructional materials only. Any amounts in the shaded cells of this column should be reviewed for appropriateness.

Section I - Expenditures	Funds 01, 09, and 62			2021-22 Expenditures
	Goals	Functions	Objects	
A. Total state, federal, and local expenditures (all resources)	All	All	1000-7999	3,263,808.00
B. Less all federal expenditures not allowed for MOE (Resources 3000-5999, except 3385)	All	All	1000-7999	204,416.00
C. Less state and local expenditures not allowed for MOE: (All resources, except federal as identified in Line B)				
1. Community Services	All	5000-5999	1000-7999	126,129.00
2. Capital Outlay	All except 7100-7199	All except 5000-5999	6000-6999	1,757.00
3. Debt Service	All	9100	5400-5450, 5800, 7430-7439	0.00
4. Other Transfers Out	All	9200	7200-7299	0.00
5. Interfund Transfers Out	All	9300	7600-7629	0.00
6. All Other Financing Uses	All	9100, 9200	7699, 7651	0.00
7. Nonagency	7100-7199	All except 5000-5999, 9000-9999	1000-7999	110,620.00
8. Tuition (Revenue, in lieu of expenditures, to approximate costs of services for which tuition is received)	All	All	8710	0.00
9. Supplemental expenditures made as a result of a Presidentially declared disaster	Manually entered. Must not include expenditures in lines B, C1-C8, D1, or D2.			
10. Total state and local expenditures not allowed for MOE calculation (Sum lines C1 through C9)				238,506.00
D. Plus additional MOE expenditures:			1000-7143, 7300-7439	
1. Expenditures to cover deficits for food services (Funds 13 and 61) (If negative, then zero)	All	All	minus 8000-8699	0.00
2. Expenditures to cover deficits for student body activities	Manually entered. Must not include expenditures in lines A or D1.			
E. Total expenditures subject to MOE (Line A minus lines B and C10, plus lines D1 and D2)				2,820,886.00
Section II - Expenditures Per ADA				2021-22 Annual ADA/Exps. Per ADA
A. Average Daily Attendance (Form A, Annual ADA column, Line C9)				250.36
B. Expenditures per ADA (Line I.E divided by Line II.A)				11,267.32
Section III - MOE Calculation (For data collection only. Final determination will be done by CDE)		Total		Per ADA
A. Base expenditures (Preloaded expenditures from prior year official CDE MOE Calculation) (Note: If the prior year MOE was not met, CDE has adjusted the prior year base to 90 percent of the preceding prior year amount rather than the actual prior year expenditure amount.)		2,595,826.58		9,311.72
1. Adjustment to base expenditure and expenditure per ADA amounts for LEAs failing prior year MOE calculation (From Section IV)		0.00		0.00
2. Total adjusted base expenditure amounts (Line A plus Line A.1)		2,595,826.58		9,311.72
B. Required effort (Line A.2 times 90%)		2,336,243.92		8,380.55

C. Current year expenditures (Line I.E and Line II.B)	2,820,886.00	11,267.32
D. MOE deficiency amount, if any (Line B minus Line C) (If negative, then zero)	0.00	0.00
E. MOE determination (If one or both of the amounts in line D are zero, the MOE requirement is met; if both amounts are positive, the MOE requirement is not met. If either column in Line A.2 or Line C equals zero, the MOE calculation is incomplete.)	MOE Met	
F. MOE deficiency percentage, if MOE not met; otherwise, zero (Line D divided by Line B) (Funding under ESSA covered programs in FY 2023-24 may be reduced by the lower of the two percentages)	0.00%	0.00%
SECTION IV - Detail of Adjustments to Base Expenditures (used in Section III, Line A.1)		
Description of Adjustments	Total Expenditures	Expenditures Per ADA
Total adjustments to base expenditures	0.00	0.00

Budget, July 1
Budget 2022-23

Technical Review Checks

Phase - All

Display - All Technical Checks

Live Oak Charter

Sonoma County

Following is a chart of the various types of technical review checks and related requirements:

F - Fatal (Data must be corrected; an explanation is not allowed)

W/WC - Warning/Warning with Calculation (If data are not correct, correct the data; if data are correct an explanation is required)

O - Informational (If data are not correct, correct the data; if data are correct an explanation is optional, but encouraged)

IMPORT CHECKS

CHECKFUND - (Fatal) - All FUND codes must be valid. **Passed**

CHK-FUND09-ACTIVITY - (Fatal) - There is no activity in Fund 09. **Passed**

CHECKRESOURCE - (Warning) - All RESOURCE codes must be valid. **Passed**

CHK-RS-LOCAL-DEFINED - (Fatal) - All locally defined resource codes must roll up to a CDE defined resource code. **Passed**

CHECKGOAL - (Fatal) - All GOAL codes must be valid. **Passed**

CHECKFUNCTION - (Fatal) - All FUNCTION codes must be valid. **Passed**

CHECKOBJECT - (Fatal) - All OBJECT codes must be valid. **Passed**

CHK-FUNDxOBJECT - (Fatal) - All FUND and OBJECT account code combinations must be valid. **Passed**

CHK-FDXRS7690xOB8590 - (Fatal) - Funds 19, 57, 63, 66, 67, and 73 with Object 8590, All Other State Revenue, must be used in combination with Resource 7690, STRS-On Behalf Pension Contributions. **Passed**

CHK-FUNDxRESOURCE - (Warning) - All FUND and RESOURCE account code combinations should be valid. **Passed**

CHK-FUNDxGOAL - (Warning) - All FUND and GOAL account code combinations should be valid. **Passed**

CHK-FUNDxFUNCTION-A - (Warning) - All FUND (funds 01 through 12, 19, 57, 62, and 73) and FUNCTION account code combinations should be valid. **Passed**

CHK-FUNDxFUNCTION-B - (Fatal) - All FUND (all funds except for 01 through 12, 19, 57, 62, and 73) and FUNCTION account code combinations must be valid. **Passed**

CHK-RESOURCExOBJECTA - (Warning) - All RESOURCE and OBJECT (objects 8000 through 9999, except for 9791, 9793, and 9795) account code combinations should be valid. **Passed**

CHK-RESOURCExOBJECTB - (Informational) - All RESOURCE and OBJECT(objects 9791, 9793, and 9795) account code combinations should be valid. **Passed**
Explanation: NA

CHK-RES6500XOBJ8091 - (Fatal) - There is no activity in Resource 6500 (Special Education) with Object 8091 (LCFF Transfers-Current Year) or 8099 (LCFF/Revenue Limit Transfers-Prior Years). **Passed**

CHK-FUNCTIONxOBJECT - (Fatal) - All FUNCTION and OBJECT account code combinations must be valid. **Passed**

CHK-GOALxFUNCTION-A - (Fatal) - Goal and Function account code combinations (all goals with expenditure objects 1000-7999 in functions 1000-1999 and 4000-5999) must be valid. NOTE: functions not included in the GOALxFUNCTION table (0000, 2000-3999, 6000-6999, 7100-7199, 7210, 8000-8999) are not checked and will pass the TRC. **Passed**

CHK-GOALxFUNCTION-B - (Fatal) - General administration costs(functions 7200 - 7999, except 7210) must be direct - charged to an Undistributed, Nonagency, or County Services to Districts goal(Goal 0000, 7100 - 7199, or 8600 - 8699). **Passed**

SPECIAL-ED-GOAL - (Fatal) - Special Education revenue and expenditure transactions (resources 3300-3405, and 6500-6540, objects 1000-8999) must be coded to a Special Education 5000 goal or to Goal 7110, Nonagency-Educational. This technical review check excludes Early Intervening Services resources 3307, 3309, 3312, 3318, and 3332. **Passed**

GENERAL LEDGER CHECKS

INTERFD-DIR-COST - (Fatal) - Transfers of Direct Costs - Interfund (Object 5750) must net to zero for all funds. **Passed**

INTERFD-INDIRECT - (Fatal) - Transfers of Indirect Costs - Interfund (Object 7350) must net to zero for all funds. **Passed**

INTERFD-INDIRECT-FN - (Fatal) - Transfers of Indirect Costs - Interfund (Object 7350) must net to zero by function. **Passed**

INTERFD-IN-OUT - (Fatal) - Interfund Transfers In (objects 8910-8929) must equal Interfund Transfers Out (objects 7610-7629). **Passed**

LCFF-TRANSFER - (Fatal) - LCFF Transfers (objects 8091 and 8099) must net to zero, individually. **Passed**

INTRA FD-DIR-COST - (Fatal) - Transfers of Direct Costs (Object 5710) must net to zero by fund. **Passed**

INTRA FD-INDIRECT - (Fatal) - Transfers of Indirect Costs (Object 7310) must net to zero by fund. **Passed**

INTRA FD-INDIRECT-FN - (Fatal) - Transfers of Indirect Costs (Object 7310) must net to zero by function. **Passed**

CONTRIB-UNREST-REV - (Fatal) - Contributions from Unrestricted Revenues (Object 8980) must net to zero by fund. **Passed**

CONTRIB-RESTR-REV - (Fatal) - Contributions from Restricted Revenues (Object 8990) must net to zero by fund. **Passed**

EPA-CONTRIB - (Fatal) - There should be no contributions (objects 8980-8999) to the Education Protection Account (Resource 1400). **Passed**

LOTTERY-CONTRIB - (Fatal) - There should be no contributions (objects 8980-8999) to the lottery (resources 1100 and 6300) or from the Lottery: Instructional Materials (Resource 6300). **Passed**

PASS-THRU-REV=EXP - (Warning) - Pass-through revenues from all sources (objects 8287, 8587, and 8697) should equal transfers of pass-through revenues to other agencies (objects 7211 through 7213, plus 7299 for Resource 3327), by fund and resource. **Passed**

SE-PASS-THRU-REVENUE - (Warning) - Transfers of special education pass-through revenues are not reported in the general fund for the Administrative Unit of a Special Education Local Plan Area. **Passed**

EXCESS-ASSIGN-REU - (Fatal) - Amounts reported in Other Assignments (Object 9780) and/or Reserve for Economic Uncertainties (REU) (Object 9789) should not create a negative amount in Unassigned/Unappropriated (Object 9790) by fund and resource (for all funds except funds 61 through 95). **Passed**

UNASSIGNED-NEGATIVE - (Fatal) - Unassigned/Unappropriated Balance (Object 9790) must be zero or negative, by resource, in all funds except the general fund and funds 61 through 95. **Passed**

UNR-NET-POSITION-NEG - (Fatal) - Unrestricted Net Position (Object 9790), in restricted resources, must be zero or negative, by resource, in funds 61 through 95. **Passed**

RS-NET-POSITION-ZERO - (Fatal) - Restricted Net Position (Object 9797), in unrestricted resources, must be zero, by resource, in funds 61 through 95. **Passed**

EFB-POSITIVE - (Warning) - All ending fund balances (Object 979Z) should be positive by resource, by fund. **Passed**

OBJ-POSITIVE - (Warning) - All applicable objects should have a positive balance by resource, by fund. **Passed**

REV-POSITIVE - (Warning) - Revenue amounts exclusive of contributions (objects 8000-8979) should be positive by resource, by fund. **Passed**

EXP-POSITIVE - (Warning) - Expenditure amounts (objects 1000-7999) should be positive by function, resource, and fund. **Passed**

CEFB-POSITIVE - (Fatal) - Components of Ending Fund Balance/Net Position (objects 9700-9789, 9796, and 9797) must be positive individually by resource, by fund. **Passed**

EXPORT VALIDATION CHECKS

CHK-UNBALANCED-A - (Warning) - Unbalanced and/or incomplete data in any of the forms should be corrected before an official export is completed. **Passed**

CHK-UNBALANCED-B - (Fatal) - Unbalanced and/or incomplete data in any of the forms must be corrected before an official export is completed. **Passed**

CHK-DEPENDENCY - (Fatal) - If data has changed that affect other forms, the affected forms must be opened and saved. **Passed**

VERSION-CHECK - (Warning) - All versions are current. **Passed**

Budget, July 1
Estimated Actuals 2021-22
Technical Review Checks
Phase - All
Display - All Technical Checks

Live Oak Charter

Sonoma County

Following is a chart of the various types of technical review checks and related requirements:

F - Fatal (Data must be corrected; an explanation is not allowed)

W/WC - Warning/Warning with Calculation (If data are not correct, correct the data; if data are correct an explanation is required)

O - Informational (If data are not correct, correct the data; if data are correct an explanation is optional, but encouraged)

IMPORT CHECKS

CHECKFUND - (Fatal) - All FUND codes must be valid. **Passed**

CHK-FUND09-ACTIVITY - (Fatal) - There is no activity in Fund 09. **Passed**

CHECKRESOURCE - (Warning) - All RESOURCE codes must be valid. **Passed**

CHK-RS-LOCAL-DEFINED - (Fatal) - All locally defined resource codes must roll up to a CDE defined resource code. **Passed**

CHECKGOAL - (Fatal) - All GOAL codes must be valid. **Passed**

CHECKFUNCTION - (Fatal) - All FUNCTION codes must be valid. **Passed**

CHECKOBJECT - (Fatal) - All OBJECT codes must be valid. **Passed**

CHK-FUNDxOBJECT - (Fatal) - All FUND and OBJECT account code combinations must be valid. **Passed**

CHK-FDXRS7690xOB8590 - (Fatal) - Funds 19, 57, 63, 66, 67, and 73 with Object 8590, All Other State Revenue, must be used in combination with Resource 7690, STRS-On Behalf Pension Contributions. **Passed**

CHK-FUNDxRESOURCE - (Warning) - All FUND and RESOURCE account code combinations should be valid. **Passed**

CHK-FUNDxGOAL - (Warning) - All FUND and GOAL account code combinations should be valid. **Passed**

CHK-FUNDxFUNCTION-A - (Warning) - All FUND (funds 01 through 12, 19, 57, 62, and 73) and FUNCTION account code combinations should be valid. **Passed**

CHK-FUNDxFUNCTION-B - (Fatal) - All FUND (all funds except for 01 through 12, 19, 57, 62, and 73) and FUNCTION account code combinations must be valid. **Passed**

CHK-RESOURCExOBJECTA - (Warning) - All RESOURCE and OBJECT (objects 8000 through 9999, except for 9791, 9793, and 9795) account code combinations should be valid. **Passed**

CHK-RESOURCExOBJECTB - (Informational) - All RESOURCE and OBJECT(objects 9791, 9793, and 9795) account code combinations should be valid. Explanation: NA	<u>Passed</u>
CHK-RES6500XOBJ8091 - (Fatal) - There is no activity in Resource 6500 (Special Education) with Object 8091 (LCFF Transfers-Current Year) or 8099 (LCFF/Revenue Limit Transfers-Prior Years).	<u>Passed</u>
CHK-FUNCTIONxOBJECT - (Fatal) - All FUNCTION and OBJECT account code combinations must be valid.	<u>Passed</u>
CHK-GOALxFUNCTION-A - (Fatal) - Goal and Function account code combinations (all goals with expenditure objects 1000-7999 in functions 1000-1999 and 4000-5999) must be valid. NOTE: functions not included in the GOALxFUNCTION table (0000, 2000-3999, 6000-6999, 7100-7199, 7210, 8000-8999) are not checked and will pass the TRC.	<u>Passed</u>
CHK-GOALxFUNCTION-B - (Fatal) - General administration costs(functions 7200 - 7999, except 7210) must be direct - charged to an Undistributed, Nonagency, or County Services to Districts goal(Goal 0000, 7100 - 7199, or 8600 - 8699).	<u>Passed</u>
SPECIAL-ED-GOAL - (Fatal) - Special Education revenue and expenditure transactions (resources 3300-3405, and 6500-6540, objects 1000-8999) must be coded to a Special Education 5000 goal or to Goal 7110, Nonagency-Educational. This technical review check excludes Early Intervening Services resources 3307, 3309, 3312, 3318, and 3332.	<u>Passed</u>
PY-EFB=CY-BFB - (Fatal) - Prior year ending fund balance (preloaded from last year's unaudited actuals submission) must equal current year beginning fund balance (Object 9791).	<u>Passed</u>
PY-EFB=CY-BFB-RES-CH - (Fatal) - Prior year ending balance (preloaded from last year's unaudited actuals submission) must equal current year beginning balance (Object 9791), by fund and resource. To assist those charter schools that are reporting in SACS for the current year, but reported in the alternative form last year, Charter School Alternative Form prior year ending fund balances have been included in the SACS software to compare to the total of the SACS beginning balances for all resources.	<u>Passed</u>
<u>GENERAL LEDGER CHECKS</u>	
INTERFD-DIR-COST - (Fatal) - Transfers of Direct Costs - Interfund (Object 5750) must net to zero for all funds.	<u>Passed</u>
INTERFD-INDIRECT - (Fatal) - Transfers of Indirect Costs - Interfund (Object 7350) must net to zero for all funds.	<u>Passed</u>
INTERFD-INDIRECT-FN - (Fatal) - Transfers of Indirect Costs - Interfund (Object 7350) must net to zero by function.	<u>Passed</u>
INTERFD-IN-OUT - (Fatal) - Interfund Transfers In (objects 8910-8929) must equal Interfund Transfers Out (objects 7610-7629).	<u>Passed</u>
DUE-FROM=DUE-TO - (Fatal) - Due from Other Funds (Object 9310) must equal Due to Other Funds (Object 9610).	<u>Passed</u>
LCFF-TRANSFER - (Fatal) - LCFF Transfers (objects 8091 and 8099) must net to zero, individually.	<u>Passed</u>
INTRA-FD-DIR-COST - (Fatal) - Transfers of Direct Costs (Object 5710) must net to zero by fund.	<u>Passed</u>
INTRA-FD-INDIRECT - (Fatal) - Transfers of Indirect Costs (Object 7310) must net to zero by fund.	<u>Passed</u>

INTRA-FD-INDIRECT-FN - (Fatal) - Transfers of Indirect Costs (Object 7310) must net to zero by function. **Passed**

CONTRIB-UNREST-REV - (Fatal) - Contributions from Unrestricted Revenues (Object 8980) must net to zero by fund. **Passed**

CONTRIB-RESTR-REV - (Fatal) - Contributions from Restricted Revenues (Object 8990) must net to zero by fund. **Passed**

EPA-CONTRIB - (Fatal) - There should be no contributions (objects 8980-8999) to the Education Protection Account (Resource 1400). **Passed**

LOTTERY-CONTRIB - (Fatal) - There should be no contributions (objects 8980-8999) to the lottery (resources 1100 and 6300) or from the Lottery: Instructional Materials (Resource 6300). **Passed**

PASS-THRU-REV=EXP - (Warning) - Pass-through revenues from all sources (objects 8287, 8587, and 8697) should equal transfers of pass-through revenues to other agencies (objects 7211 through 7213, plus 7299 for Resource 3327), by fund and resource. **Passed**

SE-PASS-THRU-REVENUE - (Warning) - Transfers of special education pass-through revenues are not reported in the general fund for the Administrative Unit of a Special Education Local Plan Area. **Passed**

EXCESS-ASSIGN-REU - (Fatal) - Amounts reported in Other Assignments (Object 9780) and/or Reserve for Economic Uncertainties (REU) (Object 9789) should not create a negative amount in Unassigned/Unappropriated (Object 9790) by fund and resource (for all funds except funds 61 through 95). **Passed**

UNASSIGNED-NEGATIVE - (Fatal) - Unassigned/Unappropriated Balance (Object 9790) must be zero or negative, by resource, in all funds except the general fund and funds 61 through 95. **Passed**

UNR-NET-POSITION-NEG - (Fatal) - Unrestricted Net Position (Object 9790), in restricted resources, must be zero or negative, by resource, in funds 61 through 95. **Passed**

RS-NET-POSITION-ZERO - (Fatal) - Restricted Net Position (Object 9797), in unrestricted resources, must be zero, by resource, in funds 61 through 95. **Passed**

EFB-POSITIVE - (Warning) - All ending fund balances (Object 979Z) should be positive by resource, by fund. **Passed**

OBJ-POSITIVE - (Warning) - The following objects have a negative balance by resource, by fund: **Exception**

FUND	RESOURCE	OBJECT	VALUE
62	3212	8290	(\$176.00)
Explanation: Rsc 3212 and 7425 revenue and expense represents an adjustment to revenue and expense booked in 20-21 based on CDE projections in effect at the time. CDE projections were changed after 20-21 YE Close.			
62	3212	5800	(\$176.00)
Explanation: Rsc 3212 and 7425 revenue and expense represents an adjustment to revenue and expense booked in 20-21 based on CDE projections in effect at the time. CDE projections were changed after 20-21 YE Close.			
62	7425	8590	(\$41.00)
Explanation: Rsc 3212 and 7425 revenue and expense represents an adjustment to revenue and expense booked in 20-21 based on CDE projections in effect at the time. CDE projections were changed after 20-21 YE Close.			

REV-POSITIVE - (Warning) - In the following resources, total revenues exclusive of contributions (objects 8000-8979) are negative, by fund: **Exception**

FUND	RESOURCE	VALUE
62	3212	(\$176.00)
Explanation: Rsc 3212 and 7425 revenue and expense represents an adjustment to revenue and expense booked in 20-21 based on CDE projections in effect at the time. CDE projections were changed after 20-21 YE Close.		

REV-POSITIVE - (Warning) - In the following resources, total revenues exclusive of contributions (objects 8000-8979) are negative, by fund:

Exception

FUND	RESOURCE	VALUE
62	7425	(\$41.00)

Explanation: Rsc 3212 and 7425 revenue and expense represents an adjustment to revenue and expense booked in 20-21 based on CDE projections in effect at the time. CDE projections were changed after 20-21 YE Close.

EXP-POSITIVE - (Warning) - The following expenditure functions have a negative balance by resource, by fund. (NOTE: Functions, including CDE-defined optional functions, are checked individually, except functions 7200-7600 are combined.)

Exception

FUND	RESOURCE	FUNCTION	VALUE
62	3212	8200	(\$176.00)

Explanation: Rsc 3212 and 7425 revenue and expense represents an adjustment to revenue and expense booked in 20-21 based on CDE projections in effect at the time. CDE projections were changed after 20-21 YE Close.

AR-AP-POSITIVE - (Warning) - The following Accounts Receivable (Object 9200), Due from Other Funds (Object 9310), Accounts Payable (Object 9500) and/or Due to Other Funds (Object 9610) have a negative balance in excess of \$1,000 by resource, by fund:

Exception

FUND	RESOURCE	OBJECT	VALUE
62	0000	9500	(\$10,776.60)

Explanation: This is a timing issue due to final IC payroll payroll being issued in July and offsetting the negative balance in the 95xx Voluntary Deductions Accounts

CEFB-POSITIVE - (Fatal) - Components of Ending Fund Balance/Net Position (objects 9700-9789, 9796, and 9797) must be positive individually by resource, by fund.

Passed

NET-INV-CAP-ASSETS - (Warning) - If capital asset amounts are imported/keyed, objects 9400-9489, (Capital Assets) in funds 61-95, then an amount should be recorded for Object 9796 (Net Investment in Capital Assets) within the same fund.

Passed

SUPPLEMENTAL CHECKS

ASSET-ACCUM-DEPR-NEG - (Fatal) - In Form ASSET, accumulated depreciation and amortization for governmental and business-type activities must be zero or negative.

Passed

DEBT-ACTIVITY - (Informational) - If long-term debt exists, there should be activity entered in the Schedule of Long-Term Liabilities (Form DEBT) for each type of debt.

Passed

DEBT-POSITIVE - (Fatal) - In Form DEBT, long-term liability ending balances must be positive.

Passed

EXPORT VALIDATION CHECKS

CHK-UNBALANCED-A - (Warning) - Unbalanced and/or incomplete data in any of the forms should be corrected before an official export is completed.

Passed

CHK-UNBALANCED-B - (Fatal) - Unbalanced and/or incomplete data in any of the forms must be corrected before an official export is completed.

Passed

CHK-DEPENDENCY - (Fatal) - If data has changed that affect other forms, the affected forms must be opened and saved.

Passed

VERSION-CHECK - (Warning) - All versions are current.

Passed

Live Oak Charter School
Fiscal Year 2022-23

Cash Flow Report

	Beg Bal	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	Total
A. BEGINNING CASH		707,846	850,746	870,291	886,521	918,383	919,518	927,756	898,779	883,465	968,218	940,064	864,935	707,846
B. RECEIPTS (See Recv for offsets)														
LCFF Revenue Sources														
State Aid		40,273	40,273	72,491	72,491	72,491	72,491	72,491	72,491	72,491	72,491	72,491	72,491	805,459
EPA				13,590			13,590			13,590			13,590	54,358
In-Lieu Property Tax		-	94,931	189,862	126,575	126,575	126,575	126,575	126,575	221,055	110,753	110,753	221,505	1,582,182
Federal Revenues (Title I, Relief Fnd)		-	-	34,450	-	-	34,450	-	-	4,450	-	-	34,450	137,799
State SpEd / AB602														-
Other State Revenues		-	-	-	-	5,518	13,522	-	-	13,522	-	-	27,044	59,605
Local Revenues		-	-	18,500	49,584	13,000	18,500	49,584	18,500	18,500	49,584	13,000	18,500	261,751
Interfund Transfers In														-
TOTAL RECEIPTS		40,273	135,204	328,892	248,650	217,584	279,127	218,560	212,066	374,058	232,828	196,244	387,580	2,901,154
C. DISBURSEMENTS														
Certificated Salaries		5,529	50,040	89,001	91,918	88,847	88,396	88,738	92,731	93,969	91,523	91,291	134,928	1,007,912
Classified Salaries		14,686	48,999	65,243	62,952	63,664	61,111	59,237	56,615	59,845	61,768	61,262	93,524	709,207
Employee Benefits		9,218	40,969	65,868	66,755	68,731	70,018	65,063	65,553	66,408	66,439	66,564	88,552	736,538
Books and Supplies		8,902	15,517	7,651	9,056	4,299	17,126	5,126	1,795	4,423	2,797	9,537	3,889	86,250
Services		29,942	15,576	39,451	40,629	30,623	35,937	59,463	10,685	64,660	38,454	42,719	60,408	468,548
Capital Outlay								586					585	1,757
Other Outgo														-
Interfund Transfers Out													140,000	140,000
TOTAL DISBURSEMENTS		68,277	171,100	267,256	271,897	251,695	270,889	278,213	227,379	289,305	260,981	271,373	521,886	3,150,212
D. BALANCE SHEET / PRIOR YR TRANS														
Accounts Rec-District (In-Lieu)	(104,000)	104,000										(110,753)		(6,753)
Accounts Rec-State LCFF incl def)	(267,324)	66,905	55,441	55,209	54,523	35,246								267,324
Accounts Rec-State Other (Lottery, etc)	(24,344)			24,344								(27,044)		(2,700)
Accounts Rec-Fed	-											(34,450)		(34,450)
Accounts Rec-Local/Commercial	(20,000)			20,000									(20,000)	-
Accounts Payable (Commercial)	-													-
Accounts Payable (State/Prop39)	114,064													-
Accounts Payable (PCS)	145,000			(145,000)									140,000	(5,000)
Capital Assets (Net)	(5,271)	-	-	-	586	-	-	586	-	-	-	-	585	1,757
Other	-													-
TOTAL BAL SHEET / PRIOR YR		170,905	55,441	(45,447)	55,109	35,246	-	586	-	-	-	-	(51,661)	220,179
E. NET INCREASE/DECREASE (B-C+D)		142,900	19,544	16,230	31,862	1,135	8,238	(28,977)	(15,313)	84,753	(28,154)	(75,129)	(185,968)	(28,879)
F. ENDING CASH (A + E)		850,746	870,291	886,521	918,383	919,518	927,756	898,779	883,465	968,218	940,064	864,935	678,967	N/A
% of Total Expenditures		27.0%	27.6%	28.1%	29.2%	29.2%	29.5%	28.5%	28.0%	30.7%	29.8%	27.5%	21.6%	

Live Oak Charter School
Fiscal Year 2023-24

Cash Flow Report

	Beg Bal	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	Total
A. BEGINNING CASH		678,967	763,249	729,559	700,546	736,997	722,484	717,489	718,545	721,282	823,621	812,221	811,571	678,967
B. RECEIPTS (See Recv for offsets)														
LCFF Revenue Sources														
State Aid		42,486	42,486	76,476	76,476	76,476	76,476	76,476	76,476	76,476	76,476	76,476	76,476	849,729
EPA				13,590			13,590			13,590			13,590	54,358
In-Lieu Property Tax		-	95,880	191,760	127,840	127,840	127,840	127,840	127,840	223,721	111,860	111,860	223,721	1,598,004
Federal Revenues (Title I, Relief Fnd)		-	-	4,187	-	-	4,187	-	-	4,187	-	-	4,187	16,748
State SpEd / AB602														-
Other State Revenues		-	-	-	-	5,634	13,522	-	-	13,522	-	-	27,044	59,721
Local Revenues		-	148	38,068	104,279	26,568	32,437	74,743	26,927	60,557	61,155	83,404	75,744	583,040
Interfund Transfers In														-
TOTAL RECEIPTS		42,486	138,514	324,080	308,595	236,518	268,051	279,559	230,253	392,051	249,491	271,740	420,761	3,161,600
C. DISBURSEMENTS														
Certificated Salaries		5,695	51,545	91,678	94,682	91,519	90,841	91,406	95,519	96,795	94,275	94,036	138,985	1,038,220
Classified Salaries		13,569	45,270	60,278	58,161	58,819	56,389	54,729	52,306	55,291	57,067	56,600	86,407	655,234
Employee Benefits		9,409	41,820	67,237	68,143	69,747	64,411	66,415	66,915	67,788	67,819	67,948	90,392	751,844
Books and Supplies		10,316	17,982	8,866	10,495	498	19,846	5,941	2,080	5,125	3,242	11,052	4,507	99,950
Services		29,967	15,589	39,484	40,663	30,649	35,968	59,512	10,694	64,714	38,486	42,754	60,458	468,940
Capital Outlay								586					585	1,757
Other Outgo														-
Interfund Transfers Out													145,600	145,600
TOTAL DISBURSEMENTS		68,957	172,205	267,338	272,730	251,031	273,046	278,589	227,515	289,713	260,890	272,390	526,935	3,161,545
D. BALANCE SHEET / PRIOR YR TRANS														
Accounts Rec-District (In-Lieu)	(110,753)	110,753										(111,860)		(1,108)
Accounts Rec-State LCFF incl def)	-													-
Accounts Rec-State Other (Lottery, etc)	(27,044)											(27,044)		(27,044)
Accounts Rec-Fed	(34,450)			34,450								(4,187)		30,263
Accounts Rec-Local/Commercial	(20,000)			20,000								(20,000)		-
Accounts Payable (Commercial)	-													-
Accounts Payable (State/Prop39)	114,061											(114,061)		(114,061)
Accounts Payable (PCS)	145,600			(140,000)								145,600		5,600
Capital Assets (Net)	(3,514)	-	-	-	586	-	-	586	-	-	-	-	585	1,757
Other	-													-
TOTAL BAL SHEET / PRIOR YR TRANS		110,753	-	(85,550)	586	-	-	586	-	-	-	-	(130,967)	(104,592)
E. NET INCREASE/DECREASE (B-C+D)		84,282	(33,691)	(29,013)	36,451	(14,513)	(4,995)	1,056	2,737	102,338	(11,399)	(651)	(237,141)	(104,537)
F. ENDING CASH (A + E)		763,249	729,559	700,546	736,997	722,484	717,489	718,545	721,282	823,621	812,221	811,571	574,430	N/A
% of Total Expenditures		24.1%	23.1%	22.2%	23.3%	22.9%	22.7%	22.7%	22.8%	26.1%	25.7%	25.7%	18.2%	

Live Oak Charter (6119036) - 22-23 Adopted - 3.29% Addl Base Increase				5/10/2022				
	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27
SUMMARY OF FUNDING								
General Assumptions								
COLA & Augmentation	3.26%	0.00%	5.07%	9.85%	5.38%	4.02%	3.72%	3.58%
Base Grant Proration Factor	-	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Add-on, ERT & MSA Proration Factor	-	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
LCFF Entitlement								
Base Grant	\$2,177,255	\$2,177,255	\$2,072,608	\$2,314,805	\$2,438,368	\$2,536,441	\$2,630,868	\$2,725,038
Grade Span Adjustment	106,245	106,245	98,952	115,199	121,302	126,159	130,892	135,624
Supplemental Grant	90,930	93,259	96,635	109,885	111,755	115,238	119,528	123,810
Concentration Grant	-	-	-	-	-	-	-	-
Add-ons: Targeted Instructional Improvement Block Grant	-	-	-	-	-	-	-	-
Add-ons: Home-to-School Transportation	-	-	-	-	-	-	-	-
Add-ons: Small School District Bus Replacement Program	-	-	-	-	-	-	-	-
Add-ons: Transitional Kindergarten	-	-	-	26,949	28,398	29,540	30,639	31,736
Total LCFF Entitlement Before Adjustments, ERT & Additional State Aid	\$2,374,430	\$2,376,759	\$2,268,195	\$2,566,838	\$2,699,823	\$2,807,378	\$2,911,927	\$3,016,208
Miscellaneous Adjustments	-	-	-	-	-	-	-	-
Economic Recovery Target	-	-	-	-	-	-	-	-
Additional State Aid	-	-	-	-	-	-	-	-
Total LCFF Entitlement	2,374,430	2,376,759	2,268,195	2,566,838	2,699,823	2,807,378	2,911,927	3,016,208
LCFF Entitlement Per ADA	\$ 8,518	\$ 8,526	\$ 8,988	\$ 9,997	\$ 10,516	\$ 10,935	\$ 11,342	\$ 11,748
Components of LCFF By Object Code								
State Aid (Object Code 8011)	\$ 893,704	\$ 748,371	\$ 796,152	\$ 1,072,595	\$ 1,183,939	\$ 1,269,526	\$ 1,351,777	\$ 1,433,426
EPA (for LCFF Calculation purposes)	\$ 55,754	\$ 55,754	\$ 50,474	\$ 51,350	\$ 51,348	\$ 51,348	\$ 51,348	\$ 51,348
<i>Local Revenue Sources:</i>								
Property Taxes (Object 8021 to 8089)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
In-Lieu of Property Taxes (Object Code 8096)	1,424,972	1,572,634	1,421,569	1,442,893	1,464,536	1,486,504	1,508,802	1,531,434
Property Taxes net of In-Lieu	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL FUNDING	2,374,430	2,376,759	2,268,195	2,566,838	2,699,823	2,807,378	2,911,927	3,016,208
Basic Aid Status	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Excess Taxes	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
EPA in Excess to LCFF Funding	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total LCFF Entitlement	2,374,430	2,376,759	2,268,195	2,566,838	2,699,823	2,807,378	2,911,927	3,016,208
SUMMARY OF EPA								
% of Adjusted Revenue Limit - Annual	16.13801139%	70.06785065%	49.17914663%	49.17914663%	49.17914663%	49.17914663%	49.17914663%	49.17914663%
% of Adjusted Revenue Limit - P-2	16.08698870%	70.06785065%	49.17914663%	49.17914663%	49.17914663%	49.17914663%	49.17914663%	49.17914663%
EPA (for LCFF Calculation purposes)	\$ 55,754	\$ 55,754	\$ 50,474	\$ 51,350	\$ 51,348	\$ 51,348	\$ 51,348	\$ 51,348
EPA, Current Year (Object Code 8012)	\$ 55,754	\$ 55,754	\$ 50,474	\$ 51,350	\$ 51,348	\$ 51,348	\$ 51,348	\$ 51,348
(P-2 plus Current Year Accrual)								
EPA, Prior Year Adjustment (Object Code 8019)	\$ 5,627.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
(P-A less Prior Year Accrual)								
Accrual (from Data Entry tab)	-	-	-	-	-	-	-	-
LCAP PERCENTAGE TO INCREASE OR IMPROVE SERVICES								
Base Grant (Excludes add-ons for TIIG and Transportation)	\$ 2,283,500	\$ 2,283,500	\$ 2,171,560	\$ 2,456,953	\$ 2,588,068	\$ 2,692,140	\$ 2,792,399	\$ 2,892,398
Supplemental and Concentration Grant funding in the LCAP year	\$ 90,930	\$ 93,259	\$ 96,635	\$ 109,885	\$ 111,755	\$ 115,238	\$ 119,528	\$ 123,810
Percentage to Increase or Improve Services	3.98%	4.08%	4.45%	4.47%	4.32%	4.28%	4.28%	4.28%

Live Oak Charter (6119036) - 22-23 Adopted - 3.29% Addl Base Increase				5/10/2022				
	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27
SUMMARY OF STUDENT POPULATION								
Unduplicated Pupil Population								
Enrollment	290	276	261	268	268	268	268	268
COE Enrollment	-	-	-	-	-	-	-	-
Total Enrollment	290	276	261	268	268	268	268	268
Unduplicated Pupil Count	60	66	58	58	58	58	58	58
COE Unduplicated Pupil Count	-	-	-	-	-	-	-	-
Total Unduplicated Pupil Count	60	66	58	58	58	58	58	58
Rolling %, Supplemental Grant	19.9100%	20.4200%	22.2500%	22.6100%	21.8300%	21.6400%	21.6400%	21.6400%
Rolling %, Concentration Grant	19.9100%	20.4200%	22.2500%	22.6100%	21.8300%	21.6400%	21.6400%	21.6400%
SUMMARY OF LCFF ADA								
Current Year ADA								
Grades TK-3	132.64	132.64	117.52	124.54	124.54	124.54	124.54	124.54
Grades 4-6	89.16	89.16	78.36	77.60	80.47	80.47	80.47	80.47
Grades 7-8	56.97	56.97	56.49	54.61	51.73	51.73	51.73	51.73
Grades 9-12	-	-	-	-	-	-	-	-
LCFF Subtotal	278.77	278.77	252.37	256.75	256.74	256.74	256.74	256.74
NSS	-	-	-	-	-	-	-	-
Combined Subtotal	278.77	278.77	252.37	256.75	256.74	256.74	256.74	256.74
Change in LCFF ADA (excludes NSS ADA)	278.77	278.77	252.37	256.75	256.74	256.74	256.74	256.74
	Increase	Increase	Increase	Increase	Increase	Increase	Increase	Increase
Funded LCFF ADA for the Hold Harmless								
Grades TK-3	132.64	132.64	117.52	124.54	124.54	124.54	124.54	124.54
Grades 4-6	89.16	89.16	78.36	77.60	80.47	80.47	80.47	80.47
Grades 7-8	56.97	56.97	56.49	54.61	51.73	51.73	51.73	51.73
Grades 9-12	-	-	-	-	-	-	-	-
Subtotal	278.77	278.77	252.37	256.75	256.74	256.74	256.74	256.74
	Current	Current	Current	Current	Current	Current	Current	Current
ACTUAL ADA (Current Year Only)								
Grades TK-3	132.64	132.64	117.52	124.54	124.54	124.54	124.54	124.54
Grades 4-6	89.16	89.16	78.36	77.60	80.47	80.47	80.47	80.47
Grades 7-8	56.97	56.97	56.49	54.61	51.73	51.73	51.73	51.73
Grades 9-12	-	-	-	-	-	-	-	-
Total Actual ADA	278.77	278.77	252.37	256.75	256.74	256.74	256.74	256.74
TOTAL FUNDED ADA								
Grades TK-3	132.64	132.64	117.52	124.54	124.54	124.54	124.54	124.54
Grades 4-6	89.16	89.16	78.36	77.60	80.47	80.47	80.47	80.47
Grades 7-8	56.97	56.97	56.49	54.61	51.73	51.73	51.73	51.73
Grades 9-12	-	-	-	-	-	-	-	-
Total	278.77	278.77	252.37	256.75	256.74	256.74	256.74	256.74
Funded Difference (Funded ADA less Actual ADA)	-	-	-	-	-	-	-	-
FUNDED ADA for the Transitional Kindergarten Add-on								
Current Year TK ADA			6.47	9.58	9.58	9.58	9.58	9.58
Funded ADA				9.58	9.58	9.58	9.58	9.58

Live Oak Charter (6119036) - 22-23 Adopted - 3.29% Addl Base Increase				5/10/2022				
	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27
PER-ADA FUNDING LEVELS								
Base, Supplemental and Concentration Rate per ADA								
Grades TK-3	\$ 8,842	\$ 8,850	\$ 9,333	\$ 10,259	\$ 10,794	\$ 11,224	\$ 11,642	\$ 12,059
Grades 4-6	\$ 8,129	\$ 8,137	\$ 8,581	\$ 9,432	\$ 9,924	\$ 10,319	\$ 10,703	\$ 11,086
Grades 7-8	\$ 8,371	\$ 8,379	\$ 8,834	\$ 9,711	\$ 10,218	\$ 10,626	\$ 11,021	\$ 11,416
Grades 9-12	\$ 9,953	\$ 9,963	\$ 10,505	\$ 11,547	\$ 12,149	\$ 12,633	\$ 13,103	\$ 13,572
Base Grants								
Grades TK-3	\$ 7,702	\$ 7,702	\$ 8,093	\$ 8,890	\$ 9,368	\$ 9,745	\$ 10,108	\$ 10,470
Grades 4-6	\$ 7,818	\$ 7,818	\$ 8,215	\$ 9,024	\$ 9,509	\$ 9,891	\$ 10,259	\$ 10,626
Grades 7-8	\$ 8,050	\$ 8,050	\$ 8,458	\$ 9,291	\$ 9,791	\$ 10,185	\$ 10,564	\$ 10,942
Grades 9-12	\$ 9,329	\$ 9,329	\$ 9,802	\$ 10,767	\$ 11,346	\$ 11,802	\$ 12,241	\$ 12,679
Grade Span Adjustment								
Grades TK-3	\$ 801	\$ 801	\$ 842	\$ 925	\$ 974	\$ 1,013	\$ 1,051	\$ 1,089
Grades 9-12	\$ 243	\$ 243	\$ 255	\$ 280	\$ 295	\$ 307	\$ 318	\$ 330
Prorated Base, Supplemental and Concentration Rate per ADA								
Grades TK-3	\$ 8,503	\$ 8,503	\$ 8,935	\$ 9,815	\$ 10,342	\$ 10,758	\$ 11,159	\$ 11,559
Grades 4-6	\$ 7,818	\$ 7,818	\$ 8,215	\$ 9,024	\$ 9,509	\$ 9,891	\$ 10,259	\$ 10,626
Grades 7-8	\$ 8,050	\$ 8,050	\$ 8,458	\$ 9,291	\$ 9,791	\$ 10,185	\$ 10,564	\$ 10,942
Grades 9-12	\$ 9,572	\$ 9,572	\$ 10,057	\$ 11,047	\$ 11,641	\$ 12,109	\$ 12,559	\$ 13,009
Prorated Base Grants								
Grades TK-3	\$ 7,702	\$ 7,702	\$ 8,093	\$ 8,890	\$ 9,368	\$ 9,745	\$ 10,108	\$ 10,470
Grades 4-6	\$ 7,818	\$ 7,818	\$ 8,215	\$ 9,024	\$ 9,509	\$ 9,891	\$ 10,259	\$ 10,626
Grades 7-8	\$ 8,050	\$ 8,050	\$ 8,458	\$ 9,291	\$ 9,791	\$ 10,185	\$ 10,564	\$ 10,942
Grades 9-12	\$ 9,329	\$ 9,329	\$ 9,802	\$ 10,767	\$ 11,346	\$ 11,802	\$ 12,241	\$ 12,679
Prorated Grade Span Adjustment								
Grades TK-3	\$ 801	\$ 801	\$ 842	\$ 925	\$ 974	\$ 1,013	\$ 1,051	\$ 1,089
Grades 9-12	\$ 243	\$ 243	\$ 255	\$ 280	\$ 295	\$ 307	\$ 318	\$ 330
Supplemental Grant								
Maximum - 1.00 ADA, 100% UPP	20%	20%	20%	20%	20%	20%	20%	20%
Grades TK-3	\$ 1,701	\$ 1,701	\$ 1,787	\$ 1,963	\$ 2,068	\$ 2,152	\$ 2,232	\$ 2,312
Grades 4-6	\$ 1,564	\$ 1,564	\$ 1,643	\$ 1,805	\$ 1,902	\$ 1,978	\$ 2,052	\$ 2,125
Grades 7-8	\$ 1,610	\$ 1,610	\$ 1,692	\$ 1,858	\$ 1,958	\$ 2,037	\$ 2,113	\$ 2,188
Grades 9-12	\$ 1,914	\$ 1,914	\$ 2,011	\$ 2,209	\$ 2,328	\$ 2,422	\$ 2,512	\$ 2,602
Actual - 1.00 ADA, Local UPP as follows:								
Grades TK-3	\$ 339	\$ 347	\$ 398	\$ 444	\$ 452	\$ 466	\$ 483	\$ 500
Grades 4-6	\$ 311	\$ 319	\$ 366	\$ 408	\$ 415	\$ 428	\$ 444	\$ 460
Grades 7-8	\$ 321	\$ 329	\$ 376	\$ 420	\$ 427	\$ 441	\$ 457	\$ 474
Grades 9-12	\$ 381	\$ 391	\$ 448	\$ 500	\$ 508	\$ 524	\$ 544	\$ 563
Concentration Grant (>55% population)								
Maximum - 1.00 ADA, 100% UPP	50%	50%	65%	65%	65%	65%	65%	65%
Grades TK-3	\$ 4,252	\$ 4,252	\$ 5,808	\$ 6,380	\$ 6,722	\$ 6,993	\$ 7,253	\$ 7,513
Grades 4-6	\$ 3,909	\$ 3,909	\$ 5,340	\$ 5,866	\$ 6,181	\$ 6,429	\$ 6,668	\$ 6,907
Grades 7-8	\$ 4,025	\$ 4,025	\$ 5,498	\$ 6,039	\$ 6,364	\$ 6,620	\$ 6,867	\$ 7,112
Grades 9-12	\$ 4,786	\$ 4,786	\$ 6,537	\$ 7,181	\$ 7,567	\$ 7,871	\$ 8,163	\$ 8,456
Actual - 1.00 ADA, Local UPP >55% as follows:								
Grades TK-3	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Grades 4-6	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Grades 7-8	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Grades 9-12	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

TOTAL SALARY AND BENEFITS EXPENDITURES BY PROGRAM 2022r23 BUDGET & LCAP [SUMMARY]

		Multitiered System of Support (MTSS)				Title I, ESSER, AB86	Enhanced / Expanded Curricular Programs					Food	Other / Programs	M&A	
		Tier 1	Tier 2		Tier 3		Enhanced Academics		Enhanced Music/Prac Arts		Enhanced Other				
Staff	Total Salary & Benefits	Core Waldorf	Acad Supt (RTI)	Student Supt (Soc/Em)	Special Ed See Noter 1)	Title I, ESSER, AB86	Math	Other	Music (Strings/ Orch)	HW	Games/ Mvmnt/ Sports	Food Services	AS/ELOP, Other	Mgmt & Admin	
Certificated Teachers	1,402,599	1,087,430	r	34,287	r	r	112,128	r	66,703	r	102,050	r	r	r	
Cert Lrng Spt/RTI	107,921	r	107,921	r	r	r	r	r	r	r	r	r	r	r	
Director/Prgm Ldr	174,466	52,340	2,791	4,138	r	r	r	r	r	r	r	r	r	115,197	
Spec/Enrichment Instr	72,215	r	r	r	r	r	r	r	r	72,215	r	r	r	r	
Total Aides / Stdnt Spt	291,757	63,507	119,214	r	65,863	16,475	r	r	r	26,698	r	r	r	r	
Office / Admin / Other	572,841	r	r	r	r	r	r	r	r	r	r	r	r	572,841	
AfterrSchool / Other	166,631	674	5,394	r	472	r	r	r	r	r	r	25,427	134,664	r	
TOT SALARY & BENEFIT	2,788,431	1,203,951	235,320	38,425	66,335	16,475	112,128	r	66,703	98,914	102,050	25,427	134,664	688,038	
r % of Tot Sal & Ben		43.2%	8.4%	1.4%	2.4%	0.6%	4.0%	0.0%	2.4%	3.5%	3.7%	0.9%	4.8%	24.7%	
SALARY & BENEFITSr SUMMARY		1,203,951		273,745	66,335	16,475		112,128		165,617	102,050	25,427	134,664	688,038	
		Tier 1	Tier 2		Tier 3	Spcl Prgm	Enhanced Academics		Enhanced Arts		Enhanced Other	Food Svcs	Other	M&A	
		Total MTSS =				1,544,031	16,475	Total Enhanced / Expanded Curr Prog =				379,796			
						55.4%	0.6%					13.6%			

Note 1r): Other SpEd Services are contracted from authorizing district.
 Est. District Gross SpEd Exp: 250,000
 Total incl District 316,335

TOTAL SALARY AND BENEFITS EXPENDITURES BY PROGRAMr 2021r22 YE ESTIMATE & LCAP [SUMMARY]

		Multitiered System of Support (MTSS)				Title I, ESSER, AB86	Enhanced / Expanded Curricular Programs								
		Tier 1	Tier 2		Tier 3		Enhanced Academics		Enhanced Music/Prac Arts		Enhanced Other	Food			
Staff	Total Salary & Benefits	Core Waldorf	Acad Supt (RTI)	Student Supt (Soc/Em)	Special Ed See Noter 1)	Title I, ESSER, AB86	Math	Other	Music (Strings/ Orch)	HW	Games/ Mvmnt/ Sports	Food Services	Other Prog (AC, Maint)	Mgmt & Admin	
Certificated Teachers	1,225,519	1,008,961	r	32,984	r	16,608	104,813	r	62,153	r	r	r	r	r	
			r			r								r	
Cert Lrng Spt/RTI	100,498	r	27,735	r	r	72,763	r	r	r	r	r	r	r	r	
Director/Prgm Ldr	164,164	49,249	2,627	3,894	r	r	r	r	r	r	r	r	r	108,394	
Spec/Enrichment Instr	159,088	r	r	r	r	r	r	r	r	67,312	91,776	r	r	r	
Total Aides / Stdnt Spt	158,193	51,989	43,613	r	r	55,043	r	r	r	4,628	r	r	2,921	r	
Office / Admin / Other	475,120	r	r	r	r	r	r	r	r	r	r	r	r	475,120	
Other	139,964	544	632	r	r	2,644	r	r	r	r	r	18,519	117,366	259	
TOT SALARY & BENEFIT	2,422,546	1,110,743	74,607	36,878	r	147,059	104,813	r	62,153	71,940	91,776	18,519	120,287	583,773	
r % of Tot Sal & Ben		45.9%	3.1%	1.5%	n/a	6.1%	4.3%	0.0%	2.6%	3.0%	3.8%	0.8%	5.0%	24.1%	
SALARY & BENEFITSr SUMMARY		1,110,743		111,485	r	147,059		104,813		134,092	91,776	18,519	120,287	583,773	
		Tier 1	Tier 2		Tier 3	Spcl Prgm	Enhanced Academics		Enhanced Arts		Enhanced Other	Food Svcs	Other	M&A	
		Total MTSS =				1,222,228	147,059		Total Enhanced / Expanded Curr Prog =		330,681				
						50.5%	6.1%			13.7%					

Note 1r): SpEd Services are contracted from authorizing district.
Est. Gross SpEd Exp: 250,000



Live Oak Charter School

Salary Schedules: 2022-23

Board Review: June 28, 2022

2022-23 Live Oak Charter School
Classified - Hourly Salary Schedule (CL-01)

	Range	1	2	3	4	5
Step						
1		16.00	18.00	20.00	22.00	25.00
2		16.80	18.90	21.00	23.10	26.25
3		17.64	19.85	22.05	24.26	27.56
4			20.84	23.15	25.47	28.94
5			22.92	25.47	28.01	31.83
6			23.61	26.23	28.85	32.79
7			25.03	27.81	30.59	34.76
8			25.78	28.64	31.50	35.80
9			27.32	30.36	33.39	37.95
10			28.14	31.27	34.40	39.09
11			28.99	32.21	35.43	40.26
12			29.86	33.17	36.49	41.47
13			30.75	34.17	37.59	42.71
14			31.67	35.19	38.71	43.99
15			32.62	36.25	39.87	45.31
16			33.60	37.34	41.07	
17			34.61	38.46		
18			35.65			
19						
20						

Step Incr - Yr 1 - 5 ** 5.0% 5.0% 5.0% 5.0% 5.0%

Step Incr - Yr 6 - ** 3.0% 3.0% 3.0% 3.0% 3.0%

All new hires start at Step 1

<u>Range</u>	<u>Position</u>	<u>Experience/Credentials</u>
1	Instr Asst Lvl 1 / After School Asst 01 ** - Probationary	No prior school experience
2	Instr Asst Lvl 1 / After School Asst 01 ** - Regular - incl Food Service / Librarian	No prior school experience
3	Instructional Asst Lvl 2 / Admin Asst 02 **	School Experience
4	Instructional Asst Specialist 01 / Admin Coord 01 **	Bachelors Degree
5	Instructional Asst Specialist 02 / Admin Coord 02 **	Masters Degree

** Note: Yrs 5, 7, & 9 receive a "Longevity Bonus" equivalent to an additional/double step

Rev: 6/28/2022

2022-23 Live Oak Charter School
Classified/Certificated - Other Rates & Stipends Schedule (CC-01)

Level				
1	2	3	4	5

1. Hourly Rates

SubA	Sub -Aide/AC Sub	16.50	18.00	20.00		
AA	Admin Asst / Sub-Office	15.00	17.50	20.00		
SubS	Sub - Spec. Assign./Prnt Mtg	25.00				Spclty Sub
ELP	ELPAC Testing	20.00	22.50	25.00		
HHT	Home/Hospital Teacher	35.00				CE
CPA	Camp Aide	15.00	17.50	20.00		
CPT	Camp Teacher	30.00				
CC	Camp Coordinator	36.50				
AT	Translator	40.00				
MNT	Maintenance Specialist	15.00	17.50	20.00	25.00	30.00
GRD	Gardener	15.00	17.50			
IAC	Instr Asst - Certificated	25.00	27.50	30.00		
CES	Certificated Sub Add On (Diff.)	45.00				Differential
SAO	Classified Sub Add-On (Diff.)	10.00	15.00	20.00		Differential
SW	Student Worker	12.00	13.50	15.00		

2. Day Rates

		Memo: STRS Setup	
Cert-Full Day	\$ 200	200.00	1.000
Cert-Short Day (e.g. Thurs)	\$ 165	264.00	0.625
Cert-Half Day	\$ 130	260.00	0.500
Clsfd-Summer Camp	\$ 250		

3. Stipends - Cert Teachers

Masters Degree	\$ 1,000
Faculty Leadership	\$ 1,500
Per Diem (Training, Overnight)	\$ 200
1st Grade Visits	\$ 1,000
RTI Coordinator	\$ 4,000
Mid Schl Coord	\$ 1,200

4. Stipends - Other

Coaching / Athletics	\$ 1,500	\$ 2,000	\$ 2,500
Special Projects/ExtraCurricular	\$ 500	\$ 1,000	\$ 1,500 \$ 2,000
Director Stipend	\$ 1,250		

5. Classified-Salaried Employees (1.0 FTE Salary Rate) **

AfterCare Coordinator	\$ 49,385
School Secretary	\$ 57,013
Enrollment Coordinator	\$ 60,000
Admin Asst/IT Coordinator	\$ 64,480
Office Manager	\$ 75,920

** actual pay level will vary based on actual FTE



Live Oak Charter School

Salary Schedules: 2022-23

- Classified Hourly Schedule (CL-01)
- Classified/Certificated - Other Rates & Stipends Schedule (CC-01)

Board Review: June 28, 2022

2022-23 Live Oak Charter School
Classified - Hourly Salary Schedule (CL-01)

	Range	I	II	III	IV	V
Step						
1		16.00	18.00	20.00	22.00	25.00
2		16.80	18.90	21.00	23.10	26.25
3		17.64	19.85	22.05	24.26	27.56
4			20.84	23.15	25.47	28.94
5			22.92	25.47	28.01	31.83
6			23.61	26.23	28.85	32.79
7			25.03	27.81	30.59	34.76
8			25.78	28.64	31.50	35.80
9			27.32	30.36	33.39	37.95
10			28.14	31.27	34.40	39.09
11			28.99	32.21	35.43	40.26
12			29.86	33.17	36.49	41.47
13			30.75	34.17	37.59	42.71
14			31.67	35.19	38.71	43.99
15			32.62	36.25	39.87	45.31
16			33.60	37.34	41.07	
17			34.61	38.46		
18			35.65			
19						
20						

All new hires start at Step 1

<u>Range</u>	<u>Position</u>	<u>Experience/Credentials</u>
I	Instr Asst Lvl 1 / After School Asst 01 ** - Probationary	No prior school experience
II	Instr Asst Lvl 1 / After School Asst 01 ** - Regular - incl Food Service / Librarian	No prior school experience
III	Instructional Asst Lvl 2 / Admin Asst 02 **	School Experience
IV	Instructional Asst Specialist 01 / Admin Coord 01 **	Bachelors Degree
V	Instructional Asst Specialist 02 / Admin Coord 02 **	Masters Degree

** Note: Yrs 5, 7, & 9 receive a "Longevity Bonus" equivalent to an additional/double step

Rev: 6/28/2022

2022-23 Live Oak Charter School
Classified/Certificated - Other Rates & Stipends Schedule (CC-01)

Level				
1	2	3	4	5

1. Hourly Rates

SubA	Sub -Aide/AC Sub	16.50	18.00	20.00		
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SubS	Sub - Spec. Assign./Prnt Mtg	25.00				Spclty Sub
ELP	ELPAC Testing	20.00	22.50	25.00		
HHT	Home/Hospital Teacher	35.00				CE
CPA	Camp Aide	15.50	17.50	20.00		
CPT	Camp Teacher	30.00				
CC	Camp Coordinator	36.50				
AT	Translator	40.00				
MNT	Maintenance Specialist	15.50	17.50	20.00	25.00	30.00
GRD	Gardener	15.50	17.50			
IAC	Instr Asst - Certificated	25.00	27.50	30.00		
CES	Certificated Sub Add On (Diff.)	45.00				Differential
SAO	Classified Sub Add-On (Diff.)	10.00	15.00	20.00		Differential
SW	Student Worker	13.25	15.00			

2. Day Rates

		Memo: STRS Setup	
Cert-Full Day	\$ 200	200.00	1.000
Cert-Short Day (e.g. Thurs)	\$ 165	264.00	0.625
Cert-Half Day	\$ 130	260.00	0.500
Clsfd-Summer Camp	\$ 250		

3. Stipends - Cert Teachers

Masters Degree	\$ 1,000
Faculty Leadership	\$ 1,500
Per Diem (Training, Overnight)	\$ 200
1st Grade Visits	\$ 1,000
RTI Coordinator	\$ 4,000
Mid Schl Coord	\$ 1,200

4. Stipends - Other

Coaching / Athletics	\$ 1,500	\$ 2,000	\$ 2,500
Special Projects/ExtraCurricular	\$ 500	\$ 1,000	\$ 1,500 \$ 2,000
Director Stipend	\$ 1,250		

5. Classified-Salaried Employees (1.0 FTE Salary Rate) **

AfterCare Coordinator	\$ 49,385	
School Secretary	\$ 57,013	
Program Coordinator	\$ 60,000	[Enrollment, Events/Volunteers, etc]
Admin Asst/IT Coordinator	\$ 64,480	
Office Manager	\$ 75,920	

** actual salary will vary based on actual FTE



Live Oak Charter School

2021/22 Classified/Hourly Salary Schedule
2021/22 - 2023/24 Teacher Salary Schedule⁻¹⁾

Board Approved: June 28, 2021

⁻¹⁾ Pending CBA Agreement ratification / approval

LIVE OAK CHARTER SCHOOL

100 Gness Concourse Petaluma, CA 94952 707.762.9020

Teacher Salary Schedule (CE/CL)

2021/22 - 2023/24

			Step Rate	Step Value
			2.00%	1130
Step	Years of Experience	Intern & Support Teachers	CA or Waldorf	CA and Waldorf
		85% of Base	92.5% of Base	100% of Base
1	0	48,025	52,263	56,500
2	1	49,155	53,393	57,630
3	2	50,285	54,523	58,760
4	3	51,415	55,653	59,890
5	4	52,545	56,783	61,020
6	5	53,675	57,913	62,150
7	6	54,805	59,043	63,280
8	7	55,935	60,173	64,410
9	8	57,065	61,303	65,540
10	9	58,195	62,433	66,670
11	10	59,325	63,563	67,800
12	11	60,455	64,693	68,930
13	12	61,585	65,823	70,060
14	13	62,715	66,953	71,190
15	14	63,845	68,083	72,320
16	15	64,975	69,213	73,450
17	16	66,105	70,343	74,580
18	17	67,235	71,473	75,710
19	18	68,365	72,603	76,840
20	19	69,495	73,733	77,970
21	20	70,625	74,863	79,100
22	21	71,755	75,993	80,230
23	22	72,885	77,123	81,360
24	23	74,015	78,253	82,490
25	24	75,145	79,383	83,620
26	25	76,275	80,513	84,750
27	26	77,405	81,643	85,880
28	27	78,535	82,773	87,010
29	28	79,665	83,903	88,140
30	29	80,795	85,033	89,270
31	30	81,925	86,163	90,400
32	31	83,055	87,293	91,530
33	32	84,185	88,423	92,660
34	33	85,315	89,553	93,790

STIPENDS

Masters Degree	\$	1,000
Middle School Coordinator	\$	1,200
Faculty Leadership Team/Member at Large	\$	750
Per Diem	\$	200
1st Grade Visits	\$	1,000
RTI Coordinator	\$	4,000

OFF-SCHEDULE PAYMENTS

CBA Off-Schedule / One-Time (22-23,23-24)	\$	1,760
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Adopted 6/21

2021-2022 Classified/Hourly Salary Schedule

Domain	Div Code	Division	Hourly	Days	Salary	Job Titles	
Instructional Support	IA-1	Instructional Assistant 1	\$ 16.00	182	\$ 23,296.00	Instructional Assistant	Strings Assistant
	IA-1	Instructional Assistant 2	\$ 16.25	182	\$ 23,660.00	Instructional Assistant	Strings Assistant
	IA-1	Instructional Assistant 3	\$ 16.50	182	\$ 24,024.00	Instructional Assistant	Strings Assistant
	IA-1	Instructional Assistant 4	\$ 16.75	182	\$ 24,388.00	Instructional Assistant	Strings Assistant
	IA-1	Instructional Assistant 5	\$ 17.00	182	\$ 24,752.00	Instructional Assistant	Strings Assistant
	IA-1	Instructional Assistant 6	\$ 17.25	182	\$ 25,116.00	Instructional Assistant	Strings Assistant
	IA-1	Instructional Assistant 7	\$ 17.50	182	\$ 25,480.00	Instructional Assistant	Strings Assistant
	IA-1	Instructional Assistant 8	\$ 17.75	182	\$ 25,844.00	Instructional Assistant	Strings Assistant
	IA-1	Instructional Assistant 9	\$ 18.00	182	\$ 26,208.00	Instructional Assistant	Strings Assistant
	IA-1	Instructional Assistant 10	\$ 18.25	182	\$ 26,572.00	Instructional Assistant	Strings Assistant
	IA-1	Instructional Assistant 11	\$ 18.50	182	\$ 26,936.00	Instructional Assistant	Strings Assistant
	IA-1	Instructional Assistant 12	\$ 18.75	182	\$ 27,300.00	Instructional Assistant	Strings Assistant
	IA-1	Instructional Assistant 13	\$ 19.00	182	\$ 27,664.00	Instructional Assistant	Strings Assistant
	IA-1	Instructional Assistant 14	\$ 19.25	182	\$ 28,028.00	Instructional Assistant	Strings Assistant
	IA-1	Instructional Assistant 15	\$ 19.50	182	\$ 28,392.00	Instructional Assistant	Strings Assistant
	IA-1	Instructional Assistant 16	\$ 19.75	182	\$ 28,756.00	Instructional Assistant	Strings Assistant
	IA-1	Instructional Assistant 17	\$ 20.00	182	\$ 29,120.00	Instructional Assistant	Strings Assistant
	IA-1	Instructional Assistant 18	\$ 20.25	182	\$ 29,484.00	Instructional Assistant	Strings Assistant
	IA-1	Instructional Assistant 19	\$ 20.50	182	\$ 29,848.00	Instructional Assistant	Strings Assistant
	IA-1	Instructional Assistant 20	\$ 20.75	182	\$ 30,212.00	Instructional Assistant	Strings Assistant
	IA-1	Instructional Assistant 21	\$ 21.00	182	\$ 30,576.00	Instructional Assistant	Strings Assistant
	IA-1	Instructional Assistant 22	\$ 21.25	182	\$ 30,940.00	Instructional Assistant	Strings Assistant
	IA-1	Instructional Assistant 23	\$ 21.50	182	\$ 31,304.00	Instructional Assistant	Strings Assistant
	IA-1	Instructional Assistant 24	\$ 21.75	182	\$ 31,668.00	Instructional Assistant	Strings Assistant
	IA-1	Instructional Assistant 25	\$ 22.00	182	\$ 32,032.00	Instructional Assistant	Strings Assistant
	IAS-1	Instructional Assistant Specialist 1	\$ 20.00	182	\$ 29,120.00	Strings Assistant	Instr Asst - Spec
	IAS-2	Instructional Assistant Specialist 2	\$ 22.50	182	\$ 32,760.00	Strings Assistant	Instr Asst - Spec
	IAS-3	Instructional Assistant Specialist 3	\$ 25.00	182	\$ 36,400.00	Strings Assistant	Instr Asst - Spec
	IAC-1	Instructional Assistant Certificated 1	\$ 27.50	182	\$ 40,040.00	Instructional Assistant	
	IAC-2	Instructional Assistant Certificated 2	\$ 30.00	182	\$ 43,680.00	Instructional Assistant	
	CPA-1	Camp Staff	\$ 15.00	/	/	Camp Aide	
	CPA-2	Camp Staff	\$ 20.00	/	/	Camp Aide	
	CPT-1	Camp Teacher	\$ 30.00	/	/	Camp Teacher	
	L-3/FS-3	Librarian / Food Service	\$ 18.25	190	\$ 27,740.00	Librarian	Food Service
	HHT-1	Home/Hospital Teacher/Cred	\$ 35.00	/	/	Home-Hospital Teacher	
	ELP-1	ELPAC Testing	\$ 20.00	/	/	ELPAC Testing	
Operations	MG-1	Maintenance & Grounds 1	\$ 15.00	182	\$ 21,840.00	Gardener	Maintenance Specialist
	MG-2	Maintenance & Grounds 2	\$ 17.50	182	\$ 25,480.00	Gardener	Maintenance Specialist
	MG-3	Maintenance & Grounds 3	\$ 20.00	182	\$ 29,120.00		Maintenance Specialist
	MG-5	Maintenance & Grounds 5	\$ 25.00	182	\$ 36,400.00		Maintenance Specialist
Administration	CC-1	Camp Coordinator	\$ 35.00	/	/	Summer Coordinator	
	AT-1	Administrative Translator 1	\$ 40.00	/	/	Translator	
	AA-1	Administrative Assistant 1	\$ 15.00	182	\$ 21,840.00	Festivals Coordinator	
	AA-2	Administrative Assistant 2	\$ 20.00	182	\$ 29,120.00		
	AC-1	Administrative Coordinator 1	\$ 25.00	190	\$ 38,000.00	Aftercare Coordinator	
Confidential Administration	CAC-1	Confidential Administrative Coordinator 1	\$ 26.00	190	\$ 39,520.00	Aftercare Coordinator	
	CAC-3	Confidential Administrative Coordinator 2	\$ 31.24	190	\$ 47,484.80	Aftercare Coordinator	
	CA-1	Confidential Administration 1 *	\$ 17.50	260	\$ 36,400.00		
	CA-2	Confidential Administration 2 *	\$ 21.63	260	\$ 45,000.00		
	CA-3	Confidential Administration 3 *	\$ 22.18	260	\$ 46,125.00	School Secretary	
	CA-4	Confidential Administration 4 *	\$ 29.81	260	\$ 62,000.00	Admin Assistant/ IT Coord	
	CM-1	Confidential Manager 1 *	\$ 35.10	260	\$ 73,000.00	Office Manager	
Stipends	ST-1	Extracurricular Stipend A	NA	NA	\$ 1,000.00		
	ST-2	Extracurricular Stipend B	NA	NA	\$ 2,000.00	Theater Choir/Stage	Athletic Director
	ST-3	Extracurricular Stipend C	NA	NA	\$ 6,000.00	Music Director	
	ST-4	Extracurricular Stipend D	NA	NA	\$ 10,000.00	Theater Director	
	ST-5	Special Projects	NA	NA	\$500 / \$1,000	Special Project A (\$500)	Special Project B (\$1,000)
	ST-6	Coaching Stipend	NA	NA	\$1,500 / \$2,500	Coach A (\$1,500)	Coach B (\$2,500)
	ST-7	ED Stipend	NA	NA	\$1,250	Adv Degree	Bi-lingual
Differential	SAO-1	Differential Add-On 1	\$ 10.00	NA	NA		
	SAO-2	Differential Add-On 2	\$ 15.00	NA	NA		
	SAO-3	Differential Add-On 3	\$ 20.00	NA	NA		
Substitute	SUBA-1	Classified Sub Aide	\$ 15.50	NA	NA	Substitute Aide	AC Sub
	SUBS-1	Classified Sub Special Assignment	\$ 25.00	NA	NA	Substitute Classified	Parent Meetings

* 260 paid days less 39 holiday and vacation days equals 221 contract days

Expanded Learning Opportunities Program Plan Guide

EXPANDED LEARNING OPPORTUNITIES PROGRAM PLAN GUIDE

Prepared by: Expanded Learning Division

California Department of Education 1430 N Street, Suite 3400
Sacramento, CA 95814-5901
916-319-0923

This Program Plan Template Guide is required by California Education Code (EC) Section 46120(b)(2)

Note: This cover page is an example, programs are free to use their own logos and the name of their program.

Name of Local Educational Agency and Expanded Learning Opportunities Program Site(s)

Name of Local Educational Agency or Equivalent:	Live Oak Charter School
Contact Name:	Justin Tomola
Contact Email:	justin.tomola@liveoakcharter.org
Contact Phone:	707-762-9020

Instructions: Please list the school sites that your LEA selected to operate the Expanded Learning Opportunities Program (ELO-P). Add additional rows as needed.

1. Live Oak Charter School

Purpose

This template will aid LEAs in the development of a program plan as required by EC Section 46120(b)(2). In this program plan, LEAs will describe program activities that support the whole child, and students' Social and Emotional Learning (SEL) and development.

Definitions

"Expanded learning" means before school, after school, summer, or intersession learning programs that focus on developing the academic, social, emotional, and physical needs and interests of pupils through hands-on, engaging learning experiences. It is the intent of the Legislature that expanded learning programs are pupil-centered, results driven, include community partners, and complement, but do not replicate, learning activities in the regular school day and school year. (EC Section 8482.1[a])

"Expanded learning opportunities" has the same meaning as "expanded learning" as defined in EC Section 8482.1. "Expanded learning opportunities" does not mean an extension of instructional time, but rather, opportunities to engage pupils in enrichment, play, nutrition, and other developmentally appropriate activities. (EC Section 46120[e][1])

Instructions

This Program Plan needs to be approved by the LEA's Governing Board in a public meeting and posted on the LEA's website.

The program plan template guide is considered a living document that is periodically reviewed and adjusted to reflect the needs of the community, updates in the law, and to provide continuous improvement in the development of an effective ELO-P.

The LEA is responsible for creating, reviewing, and updating the program plan every three years in accordance with EC Section 8482.3(g)(1). LEAs are encouraged to work collaboratively with partners and staff to develop and review the program plan. The LEA is responsible for the plan and the oversight of any community partners or subcontractors. The LEA should include any partners in the development and review of the plan. It is recommended that the plan be reviewed annually.

The Expanded Learning Division adopted the Quality Standards for Expanded Learning in California (Quality Standards) and introduced requirements for Continuous Quality Improvement (CQI) to help programs engage in reflection and be intentional about program management practices and activities delivered to students. To create the program plan, provide a narrative description in response to the prompts listed under each Quality Standard below. The LEA may customize and include additional prompts, such as describing SEL activities, or refining the plan. In addition to the narrative response, it may be useful to include tables, charts, or other visual representations that contribute to the understanding of the ELO-

P. LEAs are encouraged to download and reference the Quality Standards in order to provide ongoing improvements to the program. The Quality Standards can be found on the California Department of Education's (CDE) Quality Standards and CQI web page, located at <https://www.cde.ca.gov/ls/ex/qualstandcqi.asp>.

1—Safe and Supportive Environment

Describe how the program will provide opportunities for students to experience a safe and supportive environment. Include if the program will be offered on the schoolsite or off campus. If not on site, describe where in the community it will be and how students will be supported to get there.

Live Oak will offer daily after school programming on site and students will remain on campus at the end of the school day. The program will begin immediately upon dismissal of the instructional day and operate until 5:30 PM. The After School Program (ASP) is run by Live Oak Charter staff and aligns with programmatic offerings outlined with After School Education and Safety (ASES) after school programming. All ASP staff are trained in safety practices aligned with the school day. Furthermore, staff use a positive discipline approach with students, facilitating a community feel in the after school program.

Since we are tenants on a Fairgrounds our campus is closed during the month of June. However, we will offer a summer opportunity for extended learning and care via a collaborative partnership for 30 nine hour days with the Boys and Girls Club. As a school of choice, our families are spread out through multiple counties. Therefore, the summer programming location will be the local Boys and Girls Club which resides closest to the LOCS and daily transportation to and from the local Boys and Girls club will be the responsibility of participating families.

Additional LOCS ASP practices for High-Quality Programming:

Staff members will be identifiable to students, families, and other stakeholders.

Staff, students, families, and school partners understand where students are located throughout the duration of the program.

Staff members are trained in safety and first aid.

Incidents will be clearly documented (i.e., written reports and phone records), and communicated to the appropriate people and/or entities.

Program will maintain a current and easily accessible list of emergency contacts for students.

Program will provide an environment that supports nurturing and supportive relationships.

Staff and students share the responsibility of creating a sense of community.

The summer program will be run by the Boys and Girls Club. They establish criteria for their own programming in order to meet ELOP requirements. The summer offering provides parents with an intersession option for 30 days, 9 hours each day. Additionally, it provides additional learning opportunities for students within a nationally recognized non-profit whose mission is to help young people to reach their full potential as productive, caring, responsible citizens.

2—Active and Engaged Learning

Describe how the program will provide opportunities for students to experience active and engaged learning that either supports or supplements, but does not duplicate, the instructional day.

The design of our program and what makes it a quality program is making certain that we are offering opportunities for our students to learn and grow, beyond what they can do in the instructional day. It also offers a very safe and trusted environment for them while their parents work or take care of other business. We incorporate feedback and suggestions of our program and we ask for parental, staff and student input as to what they would like the program to look like. The ASP program will provide students with an opportunity to continue their school day environment with professional staff in a structured and nurturing environment free from media and full of continued learning activities.

Students will receive age appropriate emotional support and grade level academic support.

The LOCS after school program will offer:

Academic tutoring to support student learning
Daily recess and physical education time, to increase student physical activity levels
Weekly hands on learning activities (drawing, painting, bead making)
Social emotional learning activities (Restorative Practices)
Garden based learning and activities
Cooperative gaming
Nutritional snacks

Additional LOCS Practices for High-Quality Programming:
The program provides a variety of hands-on, project-based activities.
Activities are of high interest, and relevant to the lives of the students.
The program is designed to promote active learning.

The summer program will be run by the Boys and Girls Club. They establish criteria for their own programming in order to meet ELOP requirements. The summer offering provides parents with an intersession option for 30 days, 9 hours each day. Additionally, it provides additional learning opportunities for students within a nationally recognized non-profit whose mission is to help young people to reach their full potential as productive, caring, responsible citizens.

3—Skill Building

Describe how the program will provide opportunities for students to experience skill building.

All enrichment opportunities in the program are designed to inspire creativity and innovation, we work to increase critical thinking and problem solving, by using constant and meaningful communication and collaboration these goals can be achieved. The activities and lessons are designed to support students at their current level of performance and move them towards proficiency. Continuous collaboration and input will be facilitated between the Expanded Learning Program and the instructional day staff because the Expanded Learning Program will not replicate the instructional day, however it is important to work together with shared goals, a shared culture, shared expectations, diverse and dynamic learning modalities and time that will help us move outside of the limitations that can bind the instructional day.

The After School Program (ASP) at LOCS will provide academic tutoring support, which will enhance students academic skill set. ASP will further focus on SEL (social emotional learning skills) and physical activity skills during the after school program.

Additional LOCS Practices for High-Quality Programming:
Activities are engaging and sequenced to provide students with the opportunity to achieve mastery.
The program provides hands-on, project-based learning that will result in culminating products or events.
There are opportunities for students to work in collaborative group settings and practice team building and effective communication.
Students are able to make linkages between program activities and their lives outside of the program.

The summer program will be run by the Boys and Girls Club. They establish criteria for their own programming in order to meet ELOP requirements. The summer offering provides parents with an intersession option for 30 days, 9 hours each day. Additionally, it provides additional learning opportunities for students within a nationally recognized non-profit whose mission is to help young people to reach their full potential as productive, caring, responsible citizens.

4—Youth Voice and Leadership

Describe how the program will provide opportunities for students to engage in youth voice and leadership.

During the ASP, staff will ask students for their input on activities and PE games and will allow students to choose a from a variety of daily activities, as long as safety standards allow for this. The summer program will be run by the Boys and Girls Club. They establish criteria for their own programming in order to meet ELOP requirements.

At the end of the year, students participating in the ASP program will conduct an end of the year survey, asking for their insights and feedback into the program and how it can be enhanced including its strengths and area for growth.

Additional LOCS Practices for High-Quality Programming:

The program gathers student input when designing the program and activities.

Older students are provided with ongoing leadership opportunities that help staff plan the program.

Alumni students return to assist and provide opportunity for leadership in working with students under staff direction.

There is shared ownership of the program by both staff and students.

The staff is trained to facilitate youth voice and to recognize the leadership potential of all students.

The summer program will be run by the Boys and Girls Club. They establish criteria for their own programming in order to meet ELOP requirements. The summer offering provides parents with an intersession option for 30 days, 9 hours each day. Additionally, it provides additional learning opportunities for students within a nationally recognized non-profit whose mission is to help young people to reach their full potential as productive, caring, responsible citizens.

5—Healthy Choices and Behaviors

Describe how the program will provide opportunities for students to engage in healthy choices and behaviors. Describe how students will be served nutritious meals and/or snacks during the ELO-P hours of programing.

The ELOP focuses on healthy behaviors through daily recess and PE time blocks during the after school hours. Staff encourage students to be physically active, both during a free play recess and structured physical activities. The ASP Coordinator serves a variety of healthy food options daily for every student enrolled in the after school program.

Additional LOCS Practices for High-Quality Programming:

The program promotes student well-being through daily physical activity.

Staff members model good nutritional choices and participation in physical activities during the program.

Staff understand how the knowledge and behaviors around health contribute to the academic performance and the social-emotional well-being of the students.

The summer program will be run by the Boys and Girls Club. They establish criteria for their own programming in order to meet ELOP requirements. The summer offering provides parents with an intersession option for 30 days, 9 hours each day. Additionally, it provides additional learning opportunities for students within a nationally recognized non-profit whose mission is to help young people to reach their full potential as productive, caring, responsible citizens.

6—Diversity, Access, and Equity

Describe how the program is designed to address cultural and linguistic diversity and provide opportunities for all students to experience diversity, access, and equity. Describe how the ELO-P will provide access and opportunity for students with disabilities.

Communication is vital to our success and we use multiple means to communicate with our small community at all times. We main platforms are ParentSquare, our website, and classroom coordinators who work directly with each classroom teacher. We also make certain that all communication goes out in both English and Spanish to ensure that all parents have access. Expanded learning staff also maintain current contact information for all students enrolled in the program so that they can contact them at all times. All promotional materials for any application, program openings or events are also communicated in all of the above ways in addition to flyers posted in the office, in the classrooms and passed out to teachers.

We welcome all students interested in enrolling in the ELOP program. If students have any special needs, we make sure to have open communication so that staff are well aware and provided resources for serving those students. The only time a child is not immediately enrolled in the program is when we are limited by having enough staff to support our staff to student ratios. Our staff is also very representative of the students that we serve. In such a small community we often hire either family members or former students (alumni). Our ELOP program supports an environment that promotes diversity and cultural respect, allowing for students to celebrate their culture and unique backgrounds with planned activities. Our program will be open to serving all enrolled students at the school site and will ensure paperwork is available in multiple languages, making it accessible to all of the school families.

Additional LOCS Practices for High Quality Programming:

The program states its explicit commitment to diversity and equity through its outreach materials and/or policies. The program promotes an environment in which staff and students are comfortable sharing from their diverse backgrounds.

The program provides a welcoming environment by representing the diversity of students through program activities, curricula, displays, and communication.

Accommodations and/or adaptations are made to provide access to the program and its activities to all students.

The summer program will be run by the Boys and Girls Club. They establish criteria for their own programming in order to meet ELOP requirements. The summer offering provides parents with an intersession option for 30 days, 9 hours each day. Additionally, it provides additional learning opportunities for students within a nationally recognized non-profit whose mission is to help young people to reach their full potential as productive, caring, responsible citizens.

7—Quality Staff

Describe how the program will provide opportunities for students to engage with quality staff.

All LOCS Expanded Learning Opportunities Program staff will meet the minimum qualifications of either an Instructional Aide, Certificated Teacher, Parent Mentor/Volunteer or student tutor. The ASP Coordinator collaborates with LOCS Leadership and/or the Executive Director to determine qualification compliance. Employees who implement the Expanded Learning Opportunities Program on-campus, are selected through employee recruitment and will be subject to the approval of the Executive Director.

Program staff will be recruited through expressing intent, a resume screening, interviewing and selection process. Academic, active play, and special engagement attributes, together with relevant previous experience are all considered in maintaining balanced and capable staffing. All selected applicants are subject to fingerprinting, health screening and job requirements as conditions for continuing employment.

Additional LOCS Practices for High Quality Programming:

The program actively attempts to recruit and hire qualified staff members representative of the community of the students served.

The staff is committed to building positive relationships with each other, their students, and parents.

The program supports staff with information about program requirements, budgets, and any information that affects the day-to-day operation of the program

The summer program will be run by the Boys and Girls Club. They establish criteria for their own programming in order to meet ELOP requirements. The summer offering provides parents with an intersession option for 30 days, 9 hours each day. Additionally, it provides additional learning opportunities for students within a nationally recognized non-profit whose mission is to help young people to reach their full potential as productive, caring, responsible citizens.

8—Clear Vision, Mission, and Purpose

Describe the program’s clear vision, mission, and purpose.

The overarching philosophy for the ELOP is aligned with Live Oak’s Waldorf approach to educating the head, heart, and hands. Our goal is to provide a loving, secure, “at-home” experience for children beyond their normal school day. We provide plenty of time to play with friends, engage in arts and crafts, outdoor fun and games, rest, music, reading, nature exploration and seasonal projects. Additionally, we provide academic tutoring and grade-specific educational support.

Our program actively promotes children’s social-emotional needs by engaging in activities that bring children across the grades together. We create a supportive environment for children to make mistakes, resolve conflicts, and successfully navigate relationships with one another. We implement restorative circles to help children gain insight into their own and others’ points of view.

Additional LOCS Practices for High Quality Programming:

Activities are designed to reflect the mission, vision, and purpose and make progress toward the program’s goals and desired outcomes.

The summer program will be run by the Boys and Girls Club. They establish criteria for their own programming in order to meet ELOP requirements. The summer offering provides parents with an intersession option for 30 days, 9 hours each day. Additionally, it provides additional learning opportunities for students within a nationally recognized non-profit whose mission is to help young people to reach their full potential as productive, caring, responsible citizens.

9—Collaborative Partnerships

Describe the program’s collaborative partnerships. Local educational agencies are encouraged to collaborate with non-LEA entities to administer and implement ELO-P programs.

The ELOP staff and school site partnership is evidenced by the on-campus placement of the program office, continuation of support from LOCS Executive Director, and the ongoing opportunity for daily communication exchange between program faculty and administrative staff.

Our program partnership also includes the Boys and Girls Club of Sonoma-Marin, whereby we are able to extend the Expanded Learning Opportunities Program offerings to our students during 30 days of intersession throughout the school year.

The summer program will be run by the Boys and Girls Club. They establish criteria for their own programming in order to meet ELOP requirements. The summer offering provides parents with an intersession option for 30 days, 9 hours each day. Additionally, it provides additional learning opportunities for students within a nationally recognized non-profit whose mission is to help young people to reach their full potential as productive, caring, responsible citizens.

10—Continuous Quality Improvement

Describe the program's Continuous Quality Improvement plan.

We use an annual assessment and review of programming through using a quality improvement cycle to develop, implement, review and adjust our systems as we work to provide the best possible services to our students. In addition to integrating data driven decision making we are also committed to providing a program that serves the needs of our community, our families and our students.

Continuous Quality Improvement Cycle:

1. Assess Program Quality: Collect data on the program using multiple strategies. Data comes from sources including self-assessments, review of program policies and manuals, interviews and feedback from staff, youth, and other stakeholders, and observation of program activities.
2. Plan: Reflect on program data and use data to generate and implement an action plan for program improvement. Action plans can be used to revise and refine organizational strategies and goals, to direct organizational resources towards areas that need improvement, and to guide professional development for staff.
3. Improve Program Quality: Implement the action plan, taking time to reflect on progress along the way. Once key goals are met, reassess and update the action plan accordingly.

The summer program will be run by the Boys and Girls Club. They establish criteria for their own programming in order to meet ELOP requirements. The summer offering provides parents with an intersession option for 30 days, 9 hours each day. Additionally, it provides additional learning opportunities for students within a nationally recognized non-profit whose mission is to help young people to reach their full potential as productive, caring, responsible citizens.

11—Program Management

Describe the plan for program management.

This program is dependent upon open and frequent communication between the Executive Director of the Local Education Agency (LEA), the community partnerships, the AfterCare Program Coordinator, and Chief Business Officer of the LEA. All fiscal management is done using the SACS coding system and tracked in our budget software.

Additional LOCS Practices for High Quality Programming:

The program will have the appropriate insurance to protect staff, administrators, volunteers, students, and parents. The program will maintain written agreements that define roles and responsibilities of partners via Memorandums of Understanding (MOUs).

The program will keep a well-documented budget with line-item expenses and the duration and amount of each revenue source.

The program will revisit its budget regularly and allow flexibility to make allocation decisions as needed throughout the year.

The summer program will be run by the Boys and Girls Club. They establish criteria for their own programming in order to meet ELOP requirements. The summer offering provides parents with an intersession option for 30 days, 9 hours each day. Additionally, it provides additional learning opportunities for students within a nationally recognized non-profit whose mission is to help young people to reach their full potential as productive, caring, responsible citizens.

General Questions

Existing After School Education and Safety (ASES) and 21st Community Learning Centers (21st CCLC) Elementary and Middle School grantees.

ASES, 21st CCLC Elementary/Middle School, and the ELO-P should be considered a single, comprehensive program. In coordinating all these funding streams to move towards a single program, the expectation is that the most stringent requirements will be adopted for program guidance. If one or both grants are held, please describe how the ELO-P funding will be used to create one comprehensive and universal Expanded Learning Program.

Due to the elimination of the FY 2020–21 grant reductions process as a result of COVID 19, it is estimated that the ASES funding available for FY 2022–23 will be around \$1.7 million based solely on school closures and site cancellations. The significantly lowered amount available for funding makes this grant funding year an extremely more competitive process than previous years. Grants will be awarded to school sites that have the highest rank ordered percentage of students eligible for FRPM among the ASES grant Applicants. The Federally Reduced-Priced Meals (FRPM) funding determination cutoff last year was 71.89 percent. The FRPM percent for LOCS is currently about 21%.

Transitional Kindergarten and Kindergarten

Programs serving transitional kindergarten or kindergarten pupils shall maintain a pupil-to-staff member ratio of no more than 10 to 1. (EC Section 46120[b][2][D]). Please address the proposed schedule and plan for recruiting and preparing staff to work in the program, including supporting them to understand how to work with younger children. How will the lower pupil-to-staff ratio be maintained? How will the curriculum and program be developmentally-informed to address this younger age group?

As LOCS is preparing for universal TK enrollment, we will collaborate with and participate in any meetings and trainings to prepare for supporting younger children that is being offered by SCOE, our Authorizing district, or through the NBA group of Waldorf Schools. Our current teachers are grandfathered in since they have their credentials and have been teaching in early education since 2015. This means that no required Early Childhood Education university course units will be needed for them to continue in their position.

We will continue to look at the possibility of expanding the T/KG Aide role in each of our kindergartens to full-time roles and thereby carrying over the expertise and experience from the regular school day into the ELOP extended day and also look at using ELOP funding to ensure the 10-1 ratio and longer daily hours will be maintained.

Sample Program Schedule

Please submit a sample program schedule that describes how the ELO-P or other fund sources, including the California State Preschool Program for children enrolled in transitional kindergarten or kindergarten, will be combined with the instructional day to create a minimum of nine hours per day of programming (instructional day plus ELO-P or other supports). Also, submit a sample schedule for a minimum nine-hour summer or intersession day.

School Day Programming:
8:15 - 3:05 - Core Day Instruction Hours Grades 1-8
8:15 - 12:30 - Core Day Instruction Hours TK - K
12:30 - 5:30 - After School Program Hours
Daily Supervision starts at 8am

8:00 AM - 5:30 PM is 9.5 hours daily

Summer Programming:

The Boys and Girls Club will operate from 8:00 am to 5:00 pm Monday - Friday

Below are additional legal requirements for the ELO-P. Please ensure your Program Plan meets all of these legal requirements:

EC Section 46120(b)(2):

[LEAs] operating expanded learning opportunities programs may operate a before school component of a program, an after school component of a program, or both the before and after school components of a program, on one or multiple school sites, and shall comply with subdivisions (c), (d), and (g) of Section 8482.3, including the development of a program plan based on the following;

(2) [LEAs] operating expanded learning opportunity programs pursuant to this section may operate a before school component of a program, an after school component of a program, or both the before and after school components of a program, on one or multiple schoolsites, and shall comply with subdivisions (c), (d), and (g) of Section 8482.3, including the development of a program plan based on all of the following:

(A) The department's guidance.

(B) Section 8482.6.

(C) Paragraphs (1) to (9), inclusive, and paragraph (12) of subdivision (c) of Section 8483.3.

(D) Section 8483.4, except that programs serving transitional kindergarten or kindergarten pupils shall maintain a pupil-to-staff member ratio of no more than 10 to 1.

EC Section 46120(b)(1)(A):

On schooldays, as described in Section 46100 and Sections 46110 to 46119, inclusive, and days on which school is taught for the purpose of meeting the 175-instructional-day offering as described in Section 11960 of Title 5 of the California Code of Regulations, in-person before or after school expanded learning opportunities that, when added to daily instructional minutes, are no less than nine hours of combined instructional time and expanded learning opportunities per instructional day.

EC Section 46120(b)(1)(B):

For at least 30 nonschooldays, during intersessional periods, no less than nine hours of in-person expanded learning opportunities per day.

EC Section 46120(b)(3):

[LEAs] shall prioritize services provided pursuant to this section at schoolsites in the lowest income communities, as determined by prior year percentages of pupils eligible for free and reduced-price meals, while maximizing the number of schools and neighborhoods with expanded learning opportunities programs across their attendance area.

EC Section 46120(b)(4):

[LEAs] may serve all pupils, including elementary, middle, and secondary school pupils, in expanded learning opportunity programs provided pursuant to this section.

EC Section 46120(b)(6):

[LEAs] are encouraged to collaborate with community-based organizations and childcare providers, especially those participating in state or federally subsidized childcare programs, to maximize the number of expanded learning opportunities programs offered across their attendance areas.

EC Section 46120(c):

A [LEA] shall be subject to the audit conducted pursuant to Section 41020 to determine compliance with subdivision (b).

EC Section 8482.3(d):

[LEAs] shall agree that snacks made available through a program shall conform to the nutrition standards in Article 2.5 (commencing with Section 49430) of Chapter 9 of Part 27 of Division 4 of Title 2.

[LEAs] shall agree that meals made available through a program shall conform to the nutrition standards of the United States Department of Agriculture's at-risk afterschool meal component of the Child and Adult Care Food Program (42 United States Code [U.S.C.] Section 1766).

EC Section 8482.6:

Every pupil attending a school operating a program . . . is eligible to participate in the program, subject to program capacity. A program established . . . may charge family fees. Programs that charge family fees shall waive the cost of these fees for pupils who are eligible for free or reduced-price meals, for a child that is a homeless youth, as defined by the federal McKinney-Vento Homeless Assistance Act (42 U.S.C. Section 11434a), or for a child who the program knows is in foster care. A program that charges family fees shall schedule fees on a sliding scale that considers family income and ability to pay.

EC sections 8483.4 and 46120(b)(2)(D):

The administrator of every program established pursuant to this article shall establish minimum qualifications for each staff position that, at a minimum, ensure that all staff members who directly supervise pupils meet the minimum qualifications for an instructional aide, pursuant to the policies of the school district. Selection of the program site supervisors shall be subject to the approval of the school site principal. The administrator shall also ensure that the program maintains a pupil-to-staff member ratio of no more than 20 to 1. All program staff and volunteers shall be subject to the health screening and fingerprint clearance requirements in current law and district policy for school personnel and volunteers in the school district, except that programs serving transitional kindergarten or kindergarten pupils shall maintain a pupil-to-staff member ratio of no more than 10 to 1.

EC Section 8482.3(c)(1)(A–B):

Each component of a program established pursuant to this article shall consist of the following two elements:

(A) An educational and literacy element in which tutoring or homework assistance is provided in one or more of the following areas: language arts, mathematics, history and social science, computer training, or science.

(B) An educational enrichment element that may include, but need not be limited to, fine arts, career technical education, recreation, physical fitness, and prevention activities.

Universal Prekindergarten Planning and Implementation Grant Program – Planning Template

A Resource for Local Educational Agencies
Released – December 17, 2021

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Universal Prekindergarten in California

Decades of research demonstrate that an early and strong foundation for learning matters. Children who have effective learning opportunities before kindergarten have an advantage in school and in life over children who do not, especially children with adverse childhood experiences. Children who attend quality preschool programs are more prepared for school in terms of their early literacy, language, and math skills, their executive function, and social emotional development. In some cases, preschool participants are less likely to be identified for special education services or to be held back in elementary school than children who do not attend developmentally-informed preschool programs that include strong educational components.

California is poised to realize universal prekindergarten (UPK) for all four-year-old children, and to expand services for three-year-old children through bold leadership and the unprecedented investments in the Budget Act of 2021, including universal transitional kindergarten (UTK) and expansion of the California State Preschool Program (CSPP).

The tumult of the COVID-19 pandemic accelerated a call to action to ensure a strong educational foundation for all children, emphasizing the critical role of our education system in supporting children and families' needs and how local flexibility fuels community capacity to meet their needs. California's leaders responded with historic investments in family support, child development and care, and education. Yet, as the Master Plan for Early Learning and Care highlights, realizing the promise of early childhood investments will require all partners—across early learning and care, early education, elementary education, and expanded learning and extended care communities—to work together to create a stronger system designed to meet the needs of the whole child.

The California Universal Prekindergarten Planning and Implementation Grant Program – Overview

California seeks to set children on a trajectory of lifelong success by investing in early and equitable learning experiences, including infant and toddler supports, such as family leave and access to infant and toddler care, universal preschool for all four-year-old children, and enhanced educational experiences across an aligned preschool to third grade system.

The 2021–22 State Budget package established the UPK Planning and Implementation Grant Program as a state early learning initiative with the goal of expanding access to prekindergarten programs at local educational agencies (LEAs). This grant program provides \$200 million for the California Department of Education (CDE) to allocate directly to LEAs based on a statutory formula to support planning and implementation costs associated with expanding prekindergarten options, such as universally-available transitional kindergarten (TK), CSPP, and Head Start for eligible students, and other local and community-based partnerships. It is important for LEAs to include partners such as CSPP, Head Start, and other early learning and care providers in the co-creation of the local plan. Engaging all partners in the community will enhance resources for families and children and fully utilize and coordinate available resources, including facilities, staff, and funding.

Under the provisions of California Education Code (EC) Section 8281.5, grant funds are allocated to school districts, charter schools, and county offices of education (COEs) with kindergarten enrollment in specific years, according to a specified formula. In addition, funds are allocated to COEs to support countywide planning and capacity building around UPK.

Grant funds may be used for costs associated with creating or expanding CSPP or TK programs, or to establish or strengthen partnerships with other providers of prekindergarten education within the LEA, including Head Start programs, to ensure that high-quality options for prekindergarten education are available for four-year-old children. Allowable costs include, but are not limited to: (1) planning costs, (2) hiring and recruitment costs, (3) staff training and professional development, (4) classroom materials, and (5) supplies.

As a condition of receiving grant funds, state law requires each LEA to create a plan articulating,

how all children in the attendance area of the LEA will have access to full-day learning programs the year before kindergarten that meet the needs of parents, including through partnerships with the LEA's expanded learning offerings, the After-School Education and Safety Program, the California state preschool program, Head Start programs, and other community-based early learning and care programs (EC Section 8281.5).

Under state law, the plan must be developed for consideration by the LEA's governing board or body at a public meeting on or before June 30, 2022, after which the LEA must provide data, as specified by the State Superintendent of Public Instruction, to the CDE. The CDE must encumber funds by June 30, 2024. LEAs will have until June 30, 2025, to use the funds.

In addition, the 2021–22 State Budget also established the Expanded Learning Opportunities Program (ELO-P). The intent of the program is that all LEAs offer all unduplicated students in classroom-based instructional programs access to comprehensive afterschool and intersessional expanded learning opportunities. The ELO-P requires LEAs to offer in-person before or after-school expanded learning opportunities that, when added to the core instructional day, are no fewer than nine hours of combined instructional time and expanded learning opportunities per instructional day (EC Section 46120).

In 2021–22, all LEAs must offer all TK through sixth grade (TK–6) classroom-based, unduplicated pupils an ELO-P and provide access to 50 percent of TK–6 enrolled, classroom-based, unduplicated pupils. Commencing in 2022–23, as a condition of apportionment, LEAs with an Unduplicated Pupil Percentage (UPP) at or above 80 percent must offer an ELO-P to all TK–6 classroom-based pupils and provide access to all TK–6 classroom-based pupils upon parent or guardian request. LEAs with an UPP below 80 percent must offer an expanded learning opportunity to all TK–6 classroom-based, unduplicated pupils and provide access to 50 percent of TK–6 enrolled classroom-based, unduplicated pupils. LEAs receiving ELO-P funding must meet all TK–6 requirements, which include, but are not limited to, offering a minimum of a nine-hour day for students TK–6 during the school year, providing pupil access, and offering 30 non-school days of programming, such as during summer and intersession periods.

Summer and intersession programming are also offered through many other early learning programs such as CSPP, Head Start, and early learning and care providers. Sharing costs, staff, and resources can support implementation of TK that provides for full-day supports while also meeting parental needs and supporting parental choice of program and setting type. LEAs should consider how these services will be offered as part of their UPK Plan. For key definitions related to UPK in California, see Appendix I.

Planning Template Purpose

The UPK Planning Template has been created to: (1) offer planning questions for LEA consideration in developing comprehensive plans for UPK that meet community and family needs, and (2) outline the data that will be required for submission to the CDE to meet the requirements of EC Section 8281.5.

This template includes recommended and required planning questions. Collectively, the recommended and required questions form a set of core planning questions the CDE believes are critical to supporting the development of a comprehensive, responsive, and community-centered UPK Plan.

- Recommended Questions: LEAs are highly encouraged to incorporate answers to these questions in their UPK Plans. Responses to these questions are not required for submission to the CDE but do support more holistic planning that meets the intent of these funds.
- Required questions: LEAs will be required to answer the required data questions outlined in this template in a survey that will be issued by the CDE following the June 30, 2022, deadline for LEAs to present their plans to their governing boards.

The CDE will be collecting information on the answers to the required questions after July 30, 2022, in a survey. This will allow the CDE to learn about how LEAs are planning to implement UPK, and to identify what additional support may be needed to help LEAs as they move along the implementation process.

The questions required for submission to the CDE should be answered based on what the LEA plans to implement in the 2022–23 school year. However, the CDE encourages that LEAs, when developing their UPK Plan for consideration by their local governing board, look beyond the first year of implementation and lay the foundation for the full implementation period. The CDE also encourages LEAs to look to their Local Control and Accountability Plans (LCAPs) to identify where their LCAPs already include relevant opportunities for alignment, and to consider the results of the UPK planning and implementation efforts as it pertains to future updates to their LCAPs.

The UPK Planning Template is organized as follows:

1. Self-Certification
2. Projected Enrollment and Needs Assessment
3. Focus Area Planning
 - a. Vision and Coherence
 - b. Community Engagement and Partnerships
 - c. Workforce Recruitment and Professional Learning
 - d. Curriculum, Instruction, and Assessment
 - e. LEA Facilities, Services, and Operations
4. Technical Assistance Questions

The CDE encourages COEs to use this template as a guide for developing their own plans for how they will support the districts in their county to assess options, make decisions, and construct a plan that includes the required questions and considers the recommended questions found in this template.

Accompanying Guidance

To help introduce LEA leaders to early education concepts, agencies, and structures, the CDE will release an accompanying Guidance Document in early 2022, that will include information on the following:

1. Local LEA indirect service agencies and partners (for example, child care local planning council [LPC], Resource and Referral program [R&R], Alternative Payment Program [APP]);
2. Allowable ways to layer funding sources and programs to achieve full-day programming for four-year-old children;
3. Requirements for TK and early education facilities;
4. UPK workforce requirements for CSPP and TK educators, including the Early Learning Career Lattice, Commission on Teacher Credentialing (CTC) Child Development Teacher Permit information, information on the Multiple Subject Teaching Credential requirements, and TK educator professional learning;
5. Other available resources for UPK Implementation:
 - a. Workforce development grants and funds that can be accessed to help candidates obtain early education and TK qualifications (for example, federal stimulus funds, Educator Effectiveness Block Grant, and others);
 - b. Funding sources that can be utilized for facilities;
 - c. Funding sources that can be utilized for extended learning and care;
6. Research on the importance of participating in quality early education and research demonstrating the long-term impact on attendance, behavior, graduation rates, and academic and career success; and
7. Other resources aligned with the questions presented in the UPK Planning Template.

Additionally, the CDE will work with partners to ensure the release of additional information and technical assistance in the form of guidance, resources, tools, and regularly-scheduled webinars. Topics will include workforce, support for multilingual learners, and inclusive early education practices, among others.

Directions, Timeline, and Suggested Planning Process

LEAs are encouraged to use this template to fulfill the EC Section 8281.5 requirement to create a UPK Plan that articulates how the LEA will facilitate access to full-day learning for all children the year before kindergarten, including their partnerships with CSPP, Head Start, other preschool partners, and extended learning and care partners. The CDE will

disseminate a survey to collect responses to the required questions in this template following the June 30, 2022, deadline for presenting plans to the local governing board.

The CDE recommends the following process and timeline after the release of this UPK Planning Template in December 2021:

1. LEAs convene a planning team, including staff from the early learning department and Head Start (if these exist), curriculum and instruction, student programs, workforce and human resources (HR), business services, special education, multilingual education, expanded and after-school learning, and facilities.
2. The CDE, along with partners, will release guidance, resources, and additional information to support LEAs in the development of their UPK plan. LEAs should review this guidance as part of their planning process, and COEs should use the guidance to inform the support they offer to LEAs.
3. COEs develop plans for how they will support LEAs in their county to assess options, make decisions, and construct plans that address the required questions and consider the recommended questions found in this template. COEs should communicate with the LEAs in their county about the types of information, resources, and technical assistance the COE is able to offer to support the UPK planning process.
4. LEAs conduct outreach and engagement activities with local R&Rs, LPCs, and existing extended learning and care providers including early learning and child care providers operating within the LEA's enrollment attendance boundary.
5. LEAs convene a public engagement process to gather input and perspectives to inform the plan. This engagement process should include parents, early learning communities (including CSPP, Head Start, and the Head Start Policy Council), and expanded learning communities (including the After-School Education and Safety [ASES] Program). To ensure meaningful engagement, the CDE recommends LEAs complete this by March 1, 2022.
6. If the LEA wants technical assistance from their COE, the CDE recommends LEAs submit a draft of the UPK Plan to their COE for review by April 15, 2022.
7. Planning teams meet with the COE to discuss the LEA's draft, including local constituency input, by June 1, 2022.
8. Planning teams present a draft plan to the school board by June 30, 2022.
9. The plan shall demonstrate how families will have access to full-day learning programs the year before kindergarten that meet the needs of parents, including through partnerships with the LEA's expanded learning offerings, the ASES Program, CSPP, Head Start programs, and other community-based early learning and care programs.

Following the presentation of the plan to the LEA's school board, the LEA shall respond to the CDE's subsequent requests for information no later than July 31, 2022.

Key Considerations

Transitional Kindergarten Implementation Timeline

As a condition of receipt of apportionment, school districts and charter schools must implement universally available TK for all four-year-old children by 2025–26 (EC 48000[c][1]). LEAs are encouraged to consider how this implementation timeline will impact elements of their UPK Plan, including whether implementing UTK on a fast timeline will allow the LEA to reach economies of scale with regard to the number of classrooms and TK teachers needed. The table below illustrates the UTK implementation timeline, including eligibility and ratios.

Table: TK Eligibility, Ratio, and Class Size Requirements by Fiscal Year

Type of Requirement	2021–22	2022–23	2023–24	2024–25	2025–26
Eligibility	Turn five between September 2 and December 2; at district discretion,	Turn five between September 2 and February 2; at district discretion,	Turn five between September 2 and April 2; at district discretion, turn	Turn five between September 2 and June 2; at district discretion, turn	Turn four by September 1

Type of Requirement	2021–22	2022–23	2023–24	2024–25	2025–26
	turn five between December 3 and the end of the school year	turn five between February 3 and the end of the school year	five between April 3 and the end of the school year	five between June 3 and the end of the school year	
Ratios	Not specified	1:12	1:10**	1:10**	1:10**
Class Size	24	24	24	24	24

* average class size across the school site

** Subject to future legislative appropriation

Supporting a Preschool through Third Grade Continuum

The CDE recently launched a Preschool through Third Grade (P–3) Alignment Initiative rooted in research that suggests the gaps in children’s opportunities and learning outcomes demand system-level reform at the state, county, district, school, and community level. Through this work, the CDE hopes to disrupt inequities, address bias, and promote equitable opportunities for California’s early learners. UPK implementation presents a critical opportunity to strengthen P–3 alignment, as a means of sustaining and accelerating the improved child outcomes associated with high-quality, early learning experiences.

To ensure the LEA’s plan is aligned with the vision of a P–3 continuum, the development team for the LEA UPK Plan (for which this document is a template) should include staff from the early education department (if there is one), curriculum and instruction, student programs, workforce, HR, business services, special education, multilingual education, expanded learning and afterschool, and facilities. Furthermore, to create a strong UPK system that meets families’ needs, the voices and choices of parents should be centered. Furthermore, LEAs should conduct outreach to the early learning and care providers that operate within the zip codes that the LEA serves to include them in informing the development of the LEA’s UPK Plan.

As a best practice, the CDE recommends LEAs convene a public engagement process to gather input and perspectives to inform the plan by March 1, 2022. This engagement process should include parents, early education communities (including CSPP and Head Start), expanded learning communities (including the ASES Program), and early learning and care (including center- and home-based child care) in order to gather information from impacted communities to inform the development of this plan.

Full-Day, Extended Learning and Care

State law does not require LEAs to operate a TK program that offers full-day early learning to all children the year before kindergarten; however LEAs must articulate how they plan to offer full-day, early learning programming to all students, and how they are partnering or plan to partner with other programs, such as those listed in the statute, to ensure that every child has access to extended learning and care that, combined, equates to a full-day of programming that meets the community’s needs.

Additionally, starting in the 2022–23 school year, LEAs receiving ELO-P funding must offer nine hours of combined instructional time and expanded learning opportunities per instructional day to all unduplicated children enrolled in TK and at least 30 intersession days; however, LEAs are not required to exclusively use ELO-P funding to meet the requirement. LEAs can instead partner with Head Start, CSPP, ASES, or other community-based child care programs to fund and provide the additional extended learning and care hours needed to reach nine hours. (EC Section 46120). This would allow the LEA to use ELO-P funds to provide additional service hours or services for additional children.

Creating Joint or Aligned Plans

LEAs are permitted to partner in creating a joint UPK Plan and may submit the same plan for multiple LEAs. Small and rural LEAs serving similar communities, especially those with low TK or kindergarten average daily attendance (ADA), are strongly encouraged to consider creating a joint UPK Plan which includes non-district learning programs serving four-year-old children. LEAs are also encouraged to consider partnering with other nearby LEAs to submit a joint UPK Plan or with their COE to create a single, countywide plan. These joint plans should be developed in conjunction with CSPP, Head Start, other preschool programs, and early learning and care providers.

**UPK Planning Template
Self-Certification**

In the data collection survey submitted to the CDE, LEAs must self-certify they developed a plan that was presented for consideration by the governing board or body at a public meeting on or before June 30, 2022, for how all children in the attendance area of the LEA will have access to full-day learning programs the year before kindergarten that meet the needs of parents, including through partnerships with the LEA's expanding learning offerings, ASES, CSPP, Head Start programs, and other community-based early learning and care programs.

1. Please complete the following table:

LEA Name	Contact Name and Title of the Individual Self-Certifying the Statement Above	Email	Phone
Live Oak Charter School	Justin Tomola Executive Director	justin.tomola@liveoakcharter.org	707-762-9020

2. Did the LEA develop a joint plan with multiple LEAs (for example, multiple small and rural LEAs serving similar communities or countywide plans developed with support of the COE for all LEAs in the county)? [select one]

No

3. If the LEA answered Yes to Question 2, what other LEAs are part of this joint plan?

Projected Enrollment and Needs Assessment Recommended Planning Questions

The CDE recommends LEAs prioritize these questions as part of their UPK Plan in addition to required questions.

1. What do existing data sources indicate about parental needs and preferences related to early learning and care programs for three- and four-year-old children in the LEAs attendance area? (LEAs are encouraged to work with local early learning and care partners such as CSPP, Head Start programs, LPCs, R&Rs, and APPs, and utilize data sources such as LPC Needs Assessment data, Head Start Needs Assessments, and so on)
2. Using the projected TK enrollment for the LEA provided by the CDE, make modifications to the LEA's TK student estimates and make cumulative facilities and staffing estimates needed each year from school year 2022–23 to 2025–26. Complete the following tables.

Table: Projected Student Enrollment

Type of Student	2019–20	Current (TK-eligible children turn five between September 2 and December 2, inclusive)	2022–23 (TK-eligible children turn five between September 2 and February 2, inclusive)	2023–24 (TK-eligible children turn five between September 2 and April 2, inclusive) ⁴	2024–25 (TK-eligible children turn five between September 2 and June 2, inclusive)	2025–26 (TK-eligible children turn four by September 1)
TK Students	14	14	14	14	14	14
CSPP (if applicable)	NA	NA	NA	NA	NA	NA

Table: Facilities Estimates (Cumulative)

Type of Facility	2019–20	Current	2022–23	2023–24	2024–25	2025–26
TK Classrooms	2	2	2	2	2	2
CSPP Classrooms	0	0				
Head Start or Other Early Learning and Care Classrooms	0	0				

Table: Staffing Estimates (Cumulative)

Type of Staff	2019–20	Current	2022–23	2023–24	2024–25	2025–26
TK	2	2	2	2	2	2
TK Teacher's Assistants	2	2	2	2	2	2

Type of Staff	2019–20	Current	2022–23	2023–24	2024–25	2025–26
CSPP (if applicable)	0	0				
Other CSPP Classroom Staff (if applicable)	0	0				
Early Education District-level staffing (if applicable)	0	0				

3. As part of the ELO-P requirements, EC Section 8281.5 requires LEAs to offer or partner in offering in-person before school or after-school expanded learning opportunities that, when added to daily instructional minutes, are no fewer than nine hours of combined instructional time and expanded learning opportunities per instructional day, including through partnerships with the LEA’s expanding learning offerings, ASES, CSPP, Head Start programs, and other community-based early learning and care programs.

Consider your estimated number of TK students. Estimate the number of TK students that will utilize extended learning and care services in addition to the TK instructional minutes. Then, working with local early learning and care and expanded learning partners, estimate the number of slots available for TK students in the following programs:

Table: Projected Number of TK Students Utilizing Extended Learning and Care

2019–20	Current	2022–23	2023–24	2024–25	2025–26
7	7	7	7	7	7

Table: Projected Number of Slots Available for TK Students

Slot Type	2019–20	Current	2022–23	2023–24	2024–25	2025–26
Head Start						
ASES Program/ELO-P	14	14	14	14	14	14

Required Questions

CDE will be requiring this information be completed after the plan is presented to the governing board.

There are no required questions in this section.

Focus Area A: Vision and Coherence

In order to provide equity of access for all students and their families, it is vital for the LEA, in partnership with early learning and care programs, to develop a coherent educational system that begins with UPK, includes access to TK and other options for all four-year-old children, and provides nine hours of programming per day through a combination of instructional time and extended learning and care opportunities for those families who choose this option.

In planning for UPK, consider how the LEA's administrative structure will support school leadership in building connections between them and expanded learning programs as well as early learning and care programs (CSPP, Head Start, other subsidized or privately administered preschool and child care programs) to provide UPK programming and before school and after-school, intersession, and summer learning and care.

Recommended Planning Questions

The CDE recommends LEAs prioritize these questions as part of their UPK Plan in addition to required questions.

1. What is the LEA's vision for UPK?

Continue to offer an integrated program for our TK students with our kindergarten program. Within each kindergarten classroom of 22 students, 7 of those students will be TK students. Each year 30 kindergarten students go on to 1st grade and the 14 TK students enter their second year in the kindergarten class. The charter school's program is developmentally and educationally appropriate and emphasizes active learning of our students. The teachers provide a caring and comfortable environment complete with engaging activities specifically designed for target areas of growth and development of each student.

They learn skills such as taking turns cooperatively, sharing and following directions — all essential components for future social, behavioral, and academic success. Our purpose is to serve children. Our purpose is to provide exceptional social, and behavioral support. Our mission is to nurture and inspire confident, responsible, contributing members of society.

2. In addition to TK, what service delivery models will be integrated to offer UPK programming, including the nine hours of total extended learning and care programming around the TK instructional time for families that opt in? In developing this component of the plan, LEAs should include partners such as CSPP, Head Start, and other early learning and care providers to ensure local services and funding are maximized and coordinated in response to parental needs and choice.

Support for all students is key to the success of our UPK program. All services related to supporting students with disabilities will be available to our UPK students and program. What services we cannot provide within our small school we will coordinate with our SELPA provider of Special Education Services, the Petaluma School District. Live Oak Charter School is committed to serving all students regardless of grade level or program.

We will collaborate and operate in conjunction with our partners. These partners will include: Live Oak Charter School Board, Executive Director, Chief Business Official, Kindergarten Teachers, Operations Manager and Aftercare Leadership will coordinate actions and services associated with providing the best possible programs that build and support one another. Live Oak is determined to collaborate, implement and maintain a quality program for all students. This focus on the youngest of our populations will provide greater access to academics and social skills enabling students to truly become lifelong learners. The additional individuals assigned to the functions of implementing UPK are maintenance and operations, counselors, special education staff, teachers, and paraprofessionals.

3. Describe the planned administrative structure that will support and monitor the UPK program and facilitate connections with the ELO-P as well as non-LEA-administered early learning and care programs that will support the extended learning components of UPK.

The Live Oak Charter School Board, Executive Director, Chief Business Official, Kindergarten Teachers, and Aftercare Leadership will coordinate all actions and services associated with providing the best possible programs that build and support one another. The leadership team is determined to collaborate, implement and maintain a quality program for all students. This focus on the youngest of our populations will provide greater access to academics and social skills enabling students to truly become lifelong learners.

4. Identify and assign each individual that will be responsible for key functions pertaining to implementing UPK (for example, academic or educational services, early childhood, facilities, human resources and labor, special education, English learner or multilingual programs, partnerships, including early learning and care and ELO-P, assessment and data collection, professional learning, workforce recruitment and preparation support, or others).

Live Oak will coordinate all actions and services associated with providing the best possible programs that build and support one another. Live Oak leadership is determined to collaborate, implement and maintain a quality program for all students. This focus on the youngest of our populations will provide greater access to academics and social skills enabling students to truly become lifelong learners. The additional individuals assigned to the functions of implementing UPK are maintenance and operations, counselors, behaviorist, special education staff, teachers, and paraprofessionals.

5. Identify how UPK leadership will be integrated in the decision-making process at the executive or cabinet level.

As a small charter school, the UPK program will be available as a regular agenda item for staff leadership and faculty meetings. Any plan changes and/or updates will be made available via regular reports at board meetings. This will allow for the community and engaged partners to be aware of the program progress and implementation.

6. Describe how the LEA's proposed UPK model will be integrated with the district's LCAP.

Our LCAP goals support the UPK program. Our LCAP supports professional development, program implementation, access to programs, resources and supplies which includes our UPK. Our LCAP was and is revised annually to support all students and to increasing opportunities for our young children to gain access to academic and social skills at an early age. The charter school does not see any specific changes to our LCAP based on UPK. The actions and expenditures support it fully.

7. Describe how the LEA plans to ensure the inclusion of students with disabilities in UPK classrooms and who will be involved in the process.

Support for all students is key to the success of our UPK program. All services related to supporting students with disabilities will be available to our UPK students and program. What services we cannot provide directly as a small charter school, we will coordinate with our Special Education Service provider, Petaluma City Schools and/or our county SELPA. Live Oak Charter School is committed to serving all students regardless of grade level or program.

8. Describe how the LEA plans to support sites in building connections between them and ELO-P, as well as early learning and care partners.

We are a small charter school and the school site leadership meet on a regular basis with the aftercare leadership. As a small charter school our process for keeping and building connections is constant.

Required Questions

CDE will be requiring this information be completed after the plan is presented to the governing board.

1. Which of the following model(s) of service delivery does the LEA plan to implement for UPK for all four-year-old children, including classes fully inclusive of children with disabilities, to provide access to the least restrictive environment for learning? [select all that apply]

TK and kindergarten combination classes

2. Does the LEA plan to implement full-day TK, part-day TK, or both? [select one]

Both

3. Describe how the model(s) of service delivery selected in the preceding two questions will be implemented across the LEA's sites and why.

We offer TK as part of our two year Kindergarten program. Each class has a Credentialed Teacher and one Paraprofessional with a max cap of 22 enrolled for 22/23 school year. The half day begins at 8:15 and ends at 12:35. Then, all TK-6 grade students are eligible for extended day up until 5:30pm.

4. Does the LEA plan to begin operating a CSPP or expand its current CSPP contract? [select one]

No - the LEA has no plans to begin or expand a CSPP contract in future years

5. If the LEA answered yes in question four, what age of children does the LEA plan to serve through a CSPP contract? [select all that apply]

6. Please indicate if the LEA plans to serve students eligible for early admittance TK, for children whose fifth birthday occurs after the enrollment date for the year of implementation (see implementation timeline above)?

- a. 2022–23 (Birthdays February 3 or after) [select one]

No

- b. 2023–24 (Birthdays April 3 or after) [select one]

No

- c. 2024–25 (Birthdays June 3 or after) [select one]

No

Focus Area B: Community Engagement and Partnerships

To successfully implement UPK and create a P–3 continuum, LEAs will need to cultivate relationships and collaborate with both internal and external partners.

Recommended Planning Questions

The CDE recommends LEAs prioritize these questions as part of their UPK Plan in addition to required questions.

1. How does the LEA's UPK Plan prioritize parental needs and choices?
Live Oak plans to prioritize parental needs and choices based on: 1. Program capabilities, 2. Resources available and 3. by treating all need and choices with respect and consideration for all. Some services and opportunities may be based the limit of the classroom capacity and number of applicants. We commit to working with parents to best serve the needs of their children.
2. How does the LEA plan to meaningfully engage extended learning and care partners in the development of the LEA's UPK Plan?
We are reaching out to prospective partners to engage with us in our extended learning program and be part of our UPK plan and ELOP.
3. What actions does the LEA plan to take to partner with local R&Rs; LPCs; and existing early education, child care, and expanded learning providers within the LEA's attendance boundary to support parents to access services across LEA-administered and non-LEA-administered programs for extended learning and care and other supports?
Live Oak will continue to conduct outreach to ensure any student qualifying for the program is identified and the parents are encouraged to enroll. As a small charter school with limited resources we use a collaborative approach in order to give an opportunity to review, comment and participate in the development and implementation of this plan. This is an opportunity to continue to support all students in gaining academic and social skills at an earlier age. This will then allow students to better access learning in the progression of their education.
4. How does the LEA plan to create or grow partnerships with early learning and care providers serving children with disabilities (including how the LEA plans to collaborate with their SELPA to enroll more children with disabilities in inclusive UPK opportunities)?
Support for all students is key to the success of our UPK program. All services related to supporting students with disabilities will be available to our UPK students and program. What services we cannot provide directly as a small charter school we will coordinate with our SELPA in collaboration with Special Education Services provide, Petaluma City Schools. Live Oak Charter is committed to serving all students, including students with disabilities, regardless of grade level or program. We will collaborate and operate in conjunction with our partners. These partners will include: the School Board, Executive Director, Chief Business Official, Kindergarten Teachers, and Aftercare Leadership. The desired outcome will be services associated with providing the best possible programs that build and support one another. This focus on the youngest of our populations will provide greater access to academics and social skills enabling students to truly become lifelong learners. The additional individuals assigned to the functions of implementing UPK are maintenance and operations, counselors, behaviorist, special education staff, teachers, and paraprofessionals.
5. Develop sample program schedules that describe how the requirements of the ELO-P will be met for UPK, including the use of ELO-P funds or other fund sources; how they will be combined with the instructional day to offer a minimum of nine hours per day of programming (instructional day plus ELO-P or other supports); and how they will offer a minimum nine-hour summer or intersession day.
TK/K day begins at 8:15 and ends at 12:30 and 12:45 on minimum days. Then, all TK-6 grade students are eligible for extended day up until 5:30pm with qualified unduplicated students free from charge.

Required Questions

CDE will be requiring this information be completed and submitted to the CDE after the plan is presented to the governing board.

1. Identify which of the following opportunities the LEA implemented to obtain public input on the UPK Plan. [Select all that apply]

LCAP educational partners input sessions

Hosting meet and greets with the early learning and care community

2. Select which programs the LEA plans to combine with the TK instructional day to offer a minimum of nine hours per day of programming (instructional day plus programming) for children whose families opt in for extended learning and care. [select all that apply]

Expanded learning programs on an LEA site (ASES, 21st Century Community Learning Centers [21st CCLC], ELO-P)

Expanded learning programs at a CBO site (ASES, 21st CCLC, ELO-P)

Focus Area C: Workforce Recruitment and Professional Learning

Based on the projected enrollment and needs described in Focus Area A, LEAs should create a plan to recruit, train, and support the new TK, preschool, early learning and care, and expanded learning staff needed to support full-day early education options for all children the year before kindergarten.

(Note: All LEAs will need to plan for workforce development considerations as part of this planning work. There is a separate \$100 million allocation for the Prekindergarten Planning and Implementation Grant – Competitive, also known as the Early Education Teacher Development Grant, that will be competitively awarded and is not part of this planning template.)

EC Section 48000(g)(4) specifies that credentialed teachers who are first assigned to a TK classroom after July 1, 2015, have, by August 1, 2023, one of the following:

- a. At least 24 units in early childhood education, or childhood development, or both.
- b. As determined by the LEA employing the teacher, professional experience in a classroom setting with preschool age children that is comparable to the 24 units of education described in subparagraph (a).
- c. A Child Development Teacher Permit issued by the CTC.

EC Section 8295 specifies that teachers in CSPP shall either possess a permit issued by the CTC authorizing service in the care, development, and instruction of children in a child care and development program; or meet the following criteria:

- a. Possess a current credential issued by the CTC authorizing teaching service in elementary school or a single subject credential in home economics; and
- b. Possess twelve units in early childhood education or child development, or both, or two years' experience in early childhood education or a child care and development program.

Recommended Planning Questions

The CDE recommends LEAs prioritize these questions as part of their UPK Plan in addition to required questions.

1. How does the LEA plan to recruit the educators needed to implement its UPK Plan (including CSPP teachers, assistant teachers, TK teachers, and TK teachers' instructional aides and assistants)?

Live Oak uses its resources like local junior colleges, universities, county office and our own current staff to recruit, encourage, and support the staffing of our program with highly qualified teachers and instructional aides. This is a constant endeavor which takes place by advertisement, job fairs and word of mouth.

2. How does the LEA plan to partner with CSPP, Head Start, and other early learning and care providers to offer joint professional learning opportunities?

We plan to integrate our TK students with our kindergarten students.

3. What is the LEA's planned strategy for providing professional learning for educators across the LEA's P–3 continuum? Plans might include the following:
 - a. Who will receive this professional learning?
 - i. By role (lead teachers, assistant teachers, administrators, coaches, and so forth)
 - ii. By grade (TK staff, kindergarten through third grade staff, on-site preschool staff, off-site preschool staff, and so forth)
 - b. What content will professional learning opportunities cover?
 - i. Effective adult-child interactions
 - ii. Children's literacy and language development (aligned with the California Preschool Learning Foundations and the California Preschool Curriculum Frameworks)

- iii. Children’s developing math and science (aligned with the California Preschool Learning Foundations and the California Preschool Curriculum Frameworks)
- iv. Children’s social-emotional development (aligned with the California Preschool Learning Foundations and the California Preschool Curriculum Frameworks)
- v. Implicit bias and culturally- and linguistically-responsive practice
- vi. Adverse Childhood Experiences (ACEs) and trauma- and healing-informed practice
- vii. Curriculum selection and implementation
- viii. Creating developmentally-informed environments
- ix. Administration and use of child assessments to inform instruction
- x. Support for multilingual learners, including home language development and strategies for a bilingual classroom
- xi. Serving children with disabilities in inclusive settings, including Universal Design for Learning
- xii. Engaging culturally- and linguistically-diverse families
- c. How will professional learning be delivered?
 - i. Coaching and mentoring
 - ii. Classroom observations and demonstration lessons with colleagues
 - iii. Workshops with external professional development providers
 - iv. Internally-delivered professional learning workshops and trainings
 - v. Operating an induction program
 - vi. Partnerships with local QCC professional learning in CSPP settings
 - vii. In mixed groupings (for example, TK and CSPP teachers)
 - a. By grade (TK staff, kindergarten through third grade staff, on-site preschool staff, off-site preschool staff, and so forth)
 - b
 - i. Effective adult-child interactions
 - ii. Children’s literacy and language development (aligned with the California Preschool Learning Foundations and the California Preschool Curriculum Frameworks)
 - iv. Children’s social-emotional development (aligned with the California Preschool Learning Foundations and the California Preschool Curriculum Frameworks)
 - vii. Curriculum selection and implementation
 - viii. Creating developmentally-informed environments
 - c
 - i. Coaching and mentoring
 - ii. Classroom observations and demonstration lessons with colleagues
 - iii. Workshops with external professional development providers
 - iv. Internally-delivered professional learning workshops and trainings

4. How does the LEA plan to facilitate the development of a district early education leadership team (across grade levels and departments) and promote site-based horizontal and vertical articulation (P–3) teams to support student transitions, share strategies, and collaboratively monitor student progress?

Live Oak charter school has always maintained an early education teachers (TK/K) on our leadership team. This articulation includes meetings to discuss student transitions, sharing of strategies, and collaborative student success monitoring. This is very much a natural result of leadership and includes weekly time for collaboration.

Required Questions

CDE will be requiring this information be completed after the plan is presented to the governing board.

1. Which of the following strategies does the LEA intend to use to support diverse and effective prospective TK teachers, including multilingual educators, to earn a Multiple Subject Teaching Credential? [select all that apply]

Apply for a California Classified School Employee Teacher Credentialing Program grant (<https://www.ctc.ca.gov/educator-prep/grant-funded-programs/Classified-Sch-Empl-Teacher-Cred-Prog>) on your own, with your COE, as part of a new collaborative, or by joining an existing Classified grant program to recruit teachers

None of the above, the LEA currently has enough Multiple Subject Teaching Credential holders to meet the need for TK educators

Partner with a local IHE to provide other services to candidates seeking to earn a Multiple Subject Teaching Credential

Partner with a COE to provide other services to candidates seeking to earn a multiple subject credential

2. Which of the following strategies does the LEA intend to employ to support diverse and effective prospective TK teachers, including multilingual educators, to meet the requirements under EC Section 48000(g)(4)? [select all that apply]

None of the above; the LEA currently has enough Multiple Subject Teaching Credential holders who have at least 24 units in early childhood education, or childhood development, or both; professional experience in a classroom setting with preschool-age children that is comparable to the 24 units of education described in subparagraph (a); or a Child Development Teacher Permit issued by the CTC.

Provide advising on requirements and how to meet the requirements

3. Which of the following strategies does the LEA intend to employ to support diverse and effective prospective CSPP teachers, including multilingual educators, to obtain a Child Development Teacher Permit [select all that apply]

None of the above, the LEA is not planning to support prospective CSPP educators in obtaining a Child Development Teacher Permit

4. On which child observational assessments does the LEA intend to offer professional learning to TK, CSPP, and other early education teachers during the 2022–23 school year? [select all that apply]

LEA-based, grade level benchmarks and a report card

5. On what topics does the LEA intend to offer professional learning regarding early childhood education to site leaders and principals? [select all that apply]

ACEs and trauma- and healing-informed practice

Effective adult-child interactions

Focus Area D: Curriculum, Instruction, and Assessment

It is critical for each LEA and preschool program partner to plan for how they will develop or select curriculum or curricula that are developmentally-informed and aligned with the strengths of all students, including multilingual students and students with disabilities, as well as how they will ensure curricula are implemented with fidelity to support intentional, quality instruction for all students. LEAs and preschool program partners should consider how they will provide coherent, culturally- and linguistically-responsive UPK curriculum or curricula anchored in the California Preschool Learning Foundations (<https://www.cde.ca.gov/sp/cd/re/psfoundations.asp>) and the California Preschool Curriculum Frameworks (<https://www.cde.ca.gov/sp/cd/re/psframework.asp>) to support the development of skills across the domains outlined in those documents.

Recommended Planning Questions

The CDE recommends LEAs prioritize these questions as part of their UPK Plan in addition to required questions.

1. Describe how the LEA will develop or select a curriculum for UPK classrooms that aligns with the California Preschool Learning Foundations and California Preschool Curriculum Frameworks.

Our charter school will use its curriculum for early childhood and develop it further to meet the new ages of TK students.

2. Describe the intended timeline for curriculum implementation, including steps for piloting and gathering input from UPK teachers, and a process for ensuring curriculum fidelity.

We are looking to have the curriculum implemented as we begin the 2022-2023 school year. We are pleased to say that we have done a great deal of this work in the past when we implemented our TK program.

3. What actions does the LEA plan to take to support effective classroom organization practices and behavior management strategies to ensure a positive learning environment for a diverse population of UPK students?

The charter school is committed to providing professional development, resources and staffing that support effective classroom organization practices and behavior management. With this level of support, we are confident we will ensure a positive learning environment for a diverse population of UPK students.

4. Describe how classroom practices for UPK (TK and other preschool programs the LEA operates or has on site) will be integrated and aligned.

Our TK students will be integrated appropriately in our kindergarten classrooms.

5. What instructional practices does the LEA plan to implement to support children with disabilities in UPK (for example, implementing Universal Design for Learning, providing specialized services in the classroom with peer models, implementing social-emotional strategies such as the Pyramid Model)?

Live Oak Charter commits to use our Multiple Tiers of Support as well as a robust set of interventions to address the needs of all students. Special Education resources will be derived from SELPA, county services and Petaluma City Schools staff. We have also hired staff in the areas of counseling and social-emotional support. We are now serving more students in terms of social-emotional support than we have ever provided or needed prior to covid-19.

6. What instructional practices does the LEA plan to implement to support the language and overall development of multilingual learners?

The school is committed to seeking staff who will enhance the learning opportunities for our students. The school supports translation of materials when needed.

7. How does the LEA plan to assess dual language learners (DLLs) in areas other than English language acquisition?

The school will use approved State Assessments to address the quality of our academic English Language acquisition programs and will steadily provide art and music opportunities for all students.

Required Questions

CDE will be requiring this information be completed after the plan is presented to the governing board.

1. Does the LEA plan to provide any of the following language model(s) for TK students? [select all that apply]

None

2. If the LEA administers CSPP, does it plan to provide any of the following language model(s) for CSPP students? [select all that apply]

None

3. Identify methods the LEA plans to use to support the development of social-emotional learning and executive function skills through specific instruction in these areas and by embedding and reinforcing this instruction in all curriculum areas. [select all that apply]

Use developmental observations to identify children's emerging skills and support their development through daily interactions

Designing developmentally-appropriate learning environments to allow for individual and group activities that promote social-emotional learning and executive function skills (for example, use students' pictures or words in daily routines, feelings charts)

Use developmental observations to identify children's emerging skills and support their development through daily interactions

4. What instructional practices does the LEA plan to implement to support children with disabilities in UPK programming? [select all that apply]

Provide additional staff to support participation in instruction

5. What assessments does the LEA plan to use in TK or kindergarten? [select all that apply]

LEA-based grade level benchmarks and a report card

Focus Area E: LEA Facilities, Services, and Operations

It is critical to ensure that LEA facilities, services, and operations are thoughtfully aligned to support the implementation of UPK and movement towards a P–3 continuum. It is also critical for early education programs currently operating to continue to be a part of California’s mixed-delivery system by creating shared space, blending funding and coordinating service delivery.

For Facilities:

For facilities planning, draw on the Projected Enrollment and Needs Assessment section of this document and the LEA’s Facilities Master Plan. The objectives of this section are to identify the availability of space for UPK, the adequacy of available space to meet the kindergarten facilities standards for meeting the needs of young children, and, if needed, to update the Facilities Master Plan to address any unmet need for developmentally-appropriate space.

Recommended Planning Questions

The CDE recommends LEAs prioritize these questions as part of their UPK Plan in addition to required questions.

1. What strategies does the LEA plan to employ to integrate younger children and older children on the same campus and ensure safety and appropriate commingling?

The school already houses and provides facilities that serve our Transitional Kindergarten students in our Kindergarten classrooms. The district has been doing so for a number of years. New equipment is purchased like playground equipment. Facilities are routinely cleaned and serviced.

2. Describe how the LEA plans to address transportation issues resulting from UPK implementation.

We do not offer transportation services.

3. What strategies does the LEA intend to implement to ensure TK students have access to meals and adequate time to eat (for example, adding additional meal services and time in the cafeteria, offering breakfast after the bell [students pick up a breakfast and bring it to the classroom])? (Note: The LEA must continue to comply with all health and safety, state, and federal Child Nutrition Program regulations while implementing meal service)

Our school is fully committed and will continue to provide meal services for all students and programs regardless of the length of the school day. We contract our food services from a neighboring large district and are fully prepared to increase staff hours should the need arise. At this point we are able and providing services to all.

Required Questions

CDE will be requiring this information be completed after the plan is presented to the governing board.

1. To support an overall increase in UPK access, what efforts does the LEA plan to make to prevent the displacement of any early education programs on LEA campuses, including both LEA-administered and non-LEA-administered programs?

We will be following the State's guidelines with a change in the minimum age requirements for birth dates and enrollment by adding it to our Application, Enrollment and Waitlist policy and we do not plan to expand the number of spaces for TK students in our kindergarten classrooms, therefore we will not be displacing any other programs.

2. Does the LEA have adequate classroom space to meet the Projected Enrollment of TK students listed in the Projected Enrollment and Needs Assessment section of this document, for the respective implementation year? [multiple choice]

Yes

- i. If no, how many more classrooms does the LEA need? [identify number, open response]

- ii. If no, how might the LEA provide classrooms in the timeframe needed? [describe, open response]

3. Does the space meet the kindergarten standards described in California Code of Regulations, Title 5, Section 14030(h)(2)? [multiple choice]

Yes

- i. If no, what modifications need to be made? What resources are needed to make them? (See Facilities Grant Program Funding at <https://www.dgs.ca.gov/OPSC/Services/Page-Content/Office-of-Public-School-Construction-Services-List-Folder/Access-Full-Day-Kindergarten-Facilities-Grant-Program-Funding>) [describe, open response]

4. Does the space contain necessary adaptive equipment, assistive technology, or other accommodations to ensure children with disabilities have access to education in the least restrictive environment? [multiple choice]

Yes

- i. If no, what modifications need to be made? What resources are needed to provide equipment or accommodations? [describe, open response]

5. Does the LEA's Facilities Master Plan adequately address the need for UPK programming? [multiple choice]

Yes

- i. If no, what process will the LEA use to update the Facilities Master Plan to accommodate future TK and early education programming? [describe, open response]

6. In which of the following areas does the LEA intend to make updates to facilities? [select all that apply]

None of the above

7. What transportation will the LEA offer to children enrolled in TK? [select all that apply]

No transportation will be provided

8. Will the LEA offer transportation to transport TK children to extended learning and care opportunities that are at other sites than the one the child is enrolled at for TK?

NA

Technical Assistance Questions

The CDE is collecting information on the type(s) and topics of technical assistance that LEAs need to support implementation of a robust UPK Plan and effective UPK program. This information will be used to leverage existing resources and inform future technical assistance opportunities provided by CDE partners, including COEs, to help ensure that the needs of LEAs are met.

The following questions are optional. However, unlike the recommended questions included in Focus Areas A through E, the CDE will be collecting any information that LEAs wish to provide in response to these questions via the survey that the CDE administers to collect the required data questions above.

1. What technical assistance would be most helpful related to projecting enrollment and assessing needs? [select all that apply]

Support for parent surveys to gauge interest in service delivery models

Data analysis capacity building to support staff to refine enrollment projections based on community context

2. What technical assistance would be most helpful related to the elements included in Focus Area A: Vision and Coherence? [select all that apply]

Adjusting classroom practices to support the district's UPK model (for example, mixed-age classrooms)

Creating inclusive classrooms, including implementing Universal Design for Learning

Models for administrative structures that support effective UPK programs and facilitate connections with the ELO-P and non-LEA-administered early learning and care programs

3. What technical assistance would be most helpful related to the elements included in Focus Area B: Community Engagement and Partnerships? [select all that apply]

Support for parent surveys and engagement activities to understand parent needs and support authentic choice

Strategies for meeting the ELO-P requirements through different models of extended learning and care, including models of blending and layering funding to support the nine-hour day and ensuring developmentally-informed environments for young children

4. What technical assistance would be most helpful related to the elements included in Focus Area C: Workforce Recruitment and Professional Learning? [select all that apply]

Additional guidance on UPK workforce requirements (TK, CSPP, and other early learning and care providers)

Support for communications to recruit prospective educators and share grant and scholarship opportunities to support degree attainment

5. What technical assistance would be most helpful related to support for professional learning opportunities on specific topics? [select all that apply]

Effective adult-child interactions

Children's social-emotional development (aligned with the California Preschool Learning Foundations and the California Preschool Curriculum Frameworks)

6. What technical assistance would be most helpful related to support for specific professional learning delivery mechanisms? [select all that apply]

Coaching and mentoring

Classroom observations and demonstration lessons with colleagues

Workshops with external professional development providers

7. What technical assistance would be most helpful related to the elements included in Focus Area D: Curriculum, Instruction, and Assessment [select all that apply]

Guidance and best practices on how to monitor and support curriculum fidelity in UPK settings

Guidance on how to support effective classroom organization practices and behavior management strategies to ensure a positive learning environment for a diverse population of UPK students

8. What technical assistance would be most helpful related to implementing hands-on, interactive, and developmentally-informed early education experiences for UPK students? [select all that apply]

Considering the structure of the daily routine to enhance individual and group learning experiences

Encouraging purposeful play, choice, social interactions, and collaboration

Using child development knowledge to guide instructional approaches

9. What technical assistance would be most helpful related to the elements included in Focus Area E: LEA Facilities, Services, and Operations? [select all that apply]

Guidance on how to modify an elementary school classroom to serve young children

Appendix I - Definitions

The following definitions are critical for UPK planning efforts. Additional terms and definitions can be found in the Guidance Document:

- **Preschool through Third Grade (P–3):** P–3 is a continuum of learning from preschool through third grade that can be supported by intentional practices at the classroom, school, and leadership levels that align curricula, assessment, and professional learning opportunities to ensure instruction builds on the knowledge and skills that children acquire as they transition across grades and settings.
- **Universal prekindergarten (UPK):** UPK refers to universal TK as well as the expanded CSPP, Head Start, and early childhood special education services that families can choose from to create rich early learning opportunities for all three- and four-year-old children during the year or two years before kindergarten. In high-needs neighborhoods, the CDE strongly encourages LEAs to consider pairing TK programs with access to Head Start and CSPP for age- and income-eligible three- and four-year-old children to further bolster program quality, either through the LEA's own Head Start or CSPP program or via a contract partnership with a CBO that administers a Head Start or CSPP.
- **Transitional kindergarten (TK):** TK means the first year of a two-year kindergarten program, serving four-year-old children regardless of income that uses a modified kindergarten curriculum that is age- and developmentally-appropriate (EC Section 48000 [d]).
- **Universal transitional kindergarten (UTK):** UTK refers to the expansion of TK by 2025–26 to serve all four-year-old children by September 1 of each year, regardless of income, providing a year of rich learning opportunities the year before kindergarten that families can choose from as part of California's public education system.
- **California State Preschool Program (CSPP):** CSPP is the largest state-funded preschool program in the nation. CSPP includes both part-day and full-day services to eligible three- and four-year-old children. CSPP provides a core class curriculum that is developmentally, culturally, and linguistically appropriate for the children served. The program also provides meals and snacks to children, parent education, referrals to health and social services for families, and staff development opportunities to employees. The program is administered through LEAs, colleges, community-action agencies, local government entities, and private, nonprofit agencies.
- **Expanded learning:** This includes before school, after-school, summer, or intersession learning programs that focus on developing the academic, social, emotional, and physical needs and interests of pupils through hands-on, engaging learning experiences. It is the intent of the Legislature that expanded learning programs are pupil-centered, results-driven, include community partners, and complement, but do not replicate, learning activities in the regular school day and school year.
- **Expanded Learning Opportunities Program (ELO-P):** ELO-P provides funding for after-school and summer school enrichment programs for TK through sixth grade. The ELO-P is defined as services provided in addition to the normal school day and school year operations, to provide full-day and full-year expanded learning programs to meet the needs of working families whose children are enrolled in TK through sixth grade and also provide expanded learning enrichment programming for students. A full day is defined as in-person before school or after-school expanded learning opportunities that, when added to daily instructional minutes, are no fewer than nine hours of combined instructional time and expanded learning opportunities per instructional day. A full year includes a minimum of 30 days of programming in the summer and intersession for no fewer than nine hours of in-person expanded learning opportunities per day.
- **Early learning and care:** This refers to the continuum of programs serving children from birth to preschool or school entry, as well as extended care to support school-age children with before school and after-school care as well as vacation schedules. This includes general child care, Early Head Start and Head Start, community-based early learning and care programs, family child care providers, and family, friend, and neighbor care.
- **Extended learning and care:** This refers to the continuum of programs and services (early learning and care options and expanded learning options) available in addition to the normal school day and school year operations, to provide full-day and full-year care to meet the needs of working families whose children are enrolled in TK or kindergarten. A full day is defined as in-person before school or after-school programming or care that, when added to daily instructional minutes, provide no fewer than nine hours of combined instructional time and

expanded learning opportunities per instructional day. A full year includes a minimum of 30 days of programming in the summer and intersession for no fewer than nine hours of in-person expanded learning opportunities per day. Funding to support extended learning and care for children enrolled in TK includes the ELO-P and the CSPP, as specified in guidance provided by the CDE's Early Education Division. Additional subsidized care opportunities may be available to families who qualify, such as child care vouchers and the General Child Care School Age program.

Appendix II - Additional Deeper Planning Questions

This section includes optional planning questions for LEAs that are ready to develop more advanced UPK and P–3 plans.

These additional questions are designed to support the LEA’s development of a more comprehensive local UPK Plan. LEAs can also use these questions as a tool for integrating UPK into existing LEA plans such as the LCAP. LEA’s should assess their readiness to include any of these deeper planning questions in their initial planning process and reassess their readiness throughout the implementation of their UPK Plan.

Focus Area A: Vision and Coherence

1. If an LEA has a California State Preschool Plan (as part of the LEA’s application for its CSPP contract) what updates would the LEA like to make to the LEA’s program narrative to reflect implementation of TK?
2. Does the LEA plan to establish, maintain, and facilitate ongoing LEA leadership teams to focus on effective P–3 articulation and coordination throughout the LEA?
3. How will the LEA support sites in providing well-coordinated transitions for all P–3 students as they move through grade levels?
4. How does the LEA plan to communicate the importance of the P–3 continuum across a broad spectrum of audiences (including audiences internal and external to the district)?
5. Identify the processes and tools the LEA will use to strengthen understanding of early childhood development and facilitate communication between preschool and elementary school (including TK) teachers, principals, and administrators to support P–3 alignment?

Focus Area C: Workforce Recruitment and Professional Learning

1. What strategies does the LEA plan to employ to recruit multilingual educators to teach in dual language programs?
2. How does the LEA plan to assess the implementation of its professional learning structures to ensure efficacy?

Focus Area D: Curriculum, Instruction, and Assessment

8. Describe how the LEA plans to establish and maintain a coherent, culturally- and linguistically-responsive P–3 continuum to provide a strong integrated curriculum anchored in the California Preschool Learning Foundations and the California Preschool Curriculum Frameworks, California Common Core State Standards, and the Curriculum Frameworks.

9. What actions does the LEA plan to take to establish or expand multilingual programs across the P–3 continuum based on student population and family needs? (If the LEA has no plans to establish or expand multilingual programs across the P–3 continuum, identify how the LEA will evaluate these opportunities moving forward.)

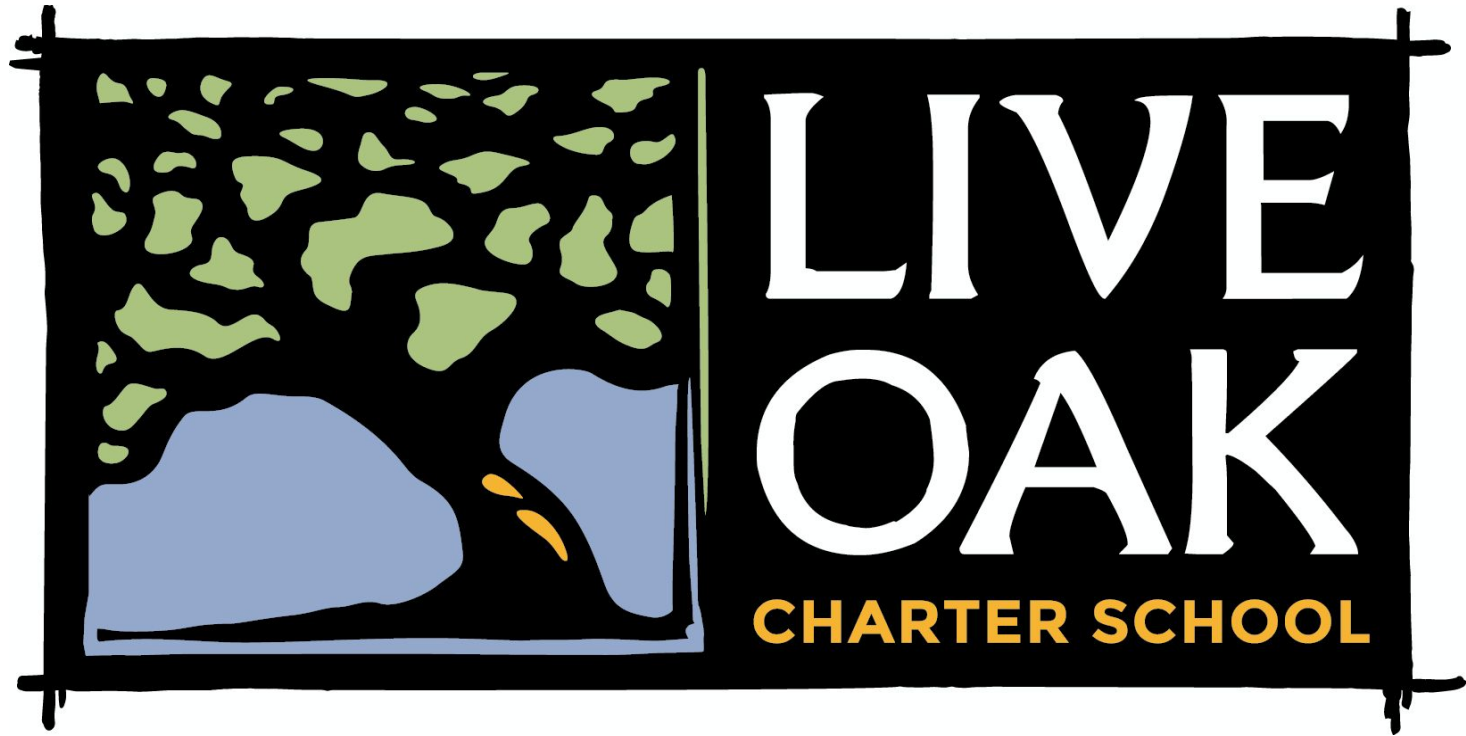
10. What planning and actions are needed to accommodate a positive meal service, and how will the LEA adapt their universal meal program for TK students?

Focus Area E: LEA Facilities, Services, and Operations

4. Describe what changes the LEA intends to make to the LEA’s Facilities Master Plan to ensure it is consistent with P–3 goals of creating seamless transitions for children and families.

5. Identify how the LEA plans to ensure TK students are included in all provisions of Multi-Tiered Systems of Supports (MTSS) and, when necessary, special education instruction, with an emphasis on early intervention and inclusion practices to address supports and least restrictive environments.

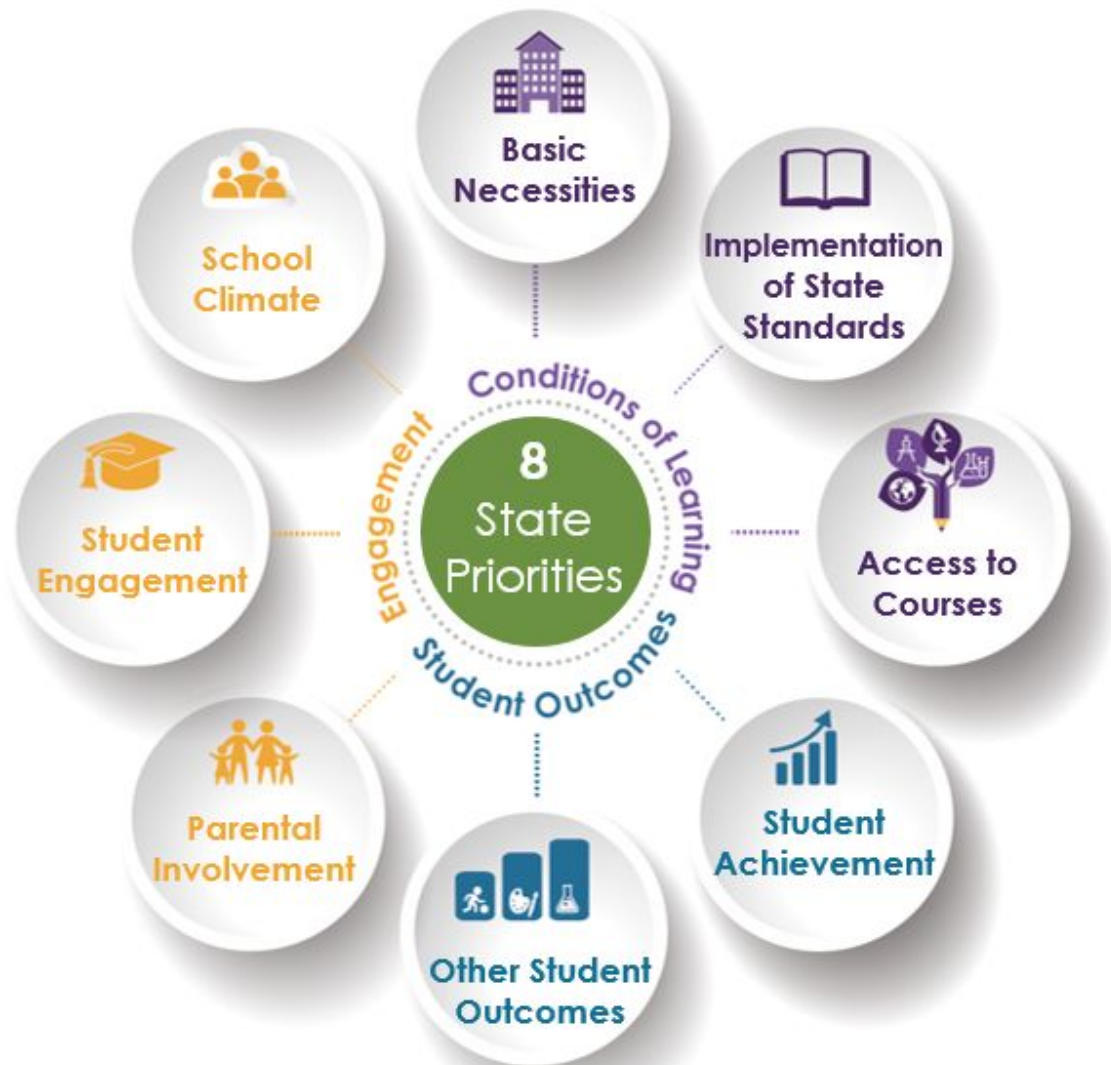
6. Identify any modifications the LEA intends to make to the Student Information System (SIS) and the assessment data system to ensure teachers and administrators have access to data from preschool through third grade.



**Local Control Accountability Plan
2022 - 2023**

Mission Statement:

Live Oak educates the whole child - head, heart, and hands - through an education that integrates each child's creative, intellectual, emotional, physical and social domains. Live Oak employs an interdisciplinary liberal arts program where art, music, and movement are integrated with core academic instruction.



8 State Priorities

- 1. Basic Services**
- 2. Implementation of State Standards**
- 3. Parent Involvement**
- 4. Pupil Achievement**
- 5. Pupil Engagement**
- 6. School Climate**
- 7. Course Access**
- 8. Pupil Outcomes**

2022 - 2023

Live Oak Budget Priorities

- **Balanced budget. No intentional deficit spending.**
- **Do not be aggressively optimistic about enrollment, ADA, and state funding.**
- **Incorporate Specialty classes to meet the spirit of our Waldorf intentions.**
- **Limit modification to staffing as much as practicable.**
- **Limit reductions to classroom budgets as much as practicable.**

5 LCAP goals for LOCS

Goal 1: Basic Services and Implementation of CCSS

Goal 2: Parent Involvement

Goal 3: Student Achievement, Outcomes, and Course Access

Goal 4: Student Engagement and School Climate

Goal 5: Local Goals

Goal One - Basic Services and Implementation of CCSS

Students have access to a Waldorf inspired curriculum with CCSS aligned materials and instruction from teachers who hold CA teaching credential. School facilities are clean, safe, and in good repair.

Actions:

1. Live Oak conducts credential review, monitoring, and audits of teacher credentials.
2. Core teachers have materials and training on implementing Waldorf and CCSS.
3. Executive Director ensures adequate budget for (1) Instructional and reference materials, and (2) classroom equipment. LO continues to invest in computers and instruments.
4. General cleaning by custodial services and school community to maintain campus.
5. Participate in the National Lunch Program

Goal Two - Parent Involvement

Live Oak will continue to provide opportunities for parent involvement through: volunteer opportunities; input on the school's board and on school committees; and input for goals, priorities and decision-making.

Actions:

1. Continue parent volunteers for: field trips, school festivals, class plays, school fundraising, and other events.
2. Continue cultivating volunteer opportunities in the classroom per the class teacher.
3. Continue opportunities for school governance, working groups and other programs.
4. Continue annual surveys for feedback and input.
5. Continue to listen to parent ideas, concerns, and input.
6. Continue opportunities for parent education, community events, and activities.

Goal Three - Student Achievement, Outcomes and Course Access

3.1. Students meet academic target, per CA Dashboard, and have equal to or higher than local and/or State achievement in ELA/Literacy and Math in: CAASPP ELA and Math Dashboard data

3.2 Students grades 3-8 take benchmark assessments

3.3. Positive Student Character Development, social emotional proficiency, and Restorative Justice practices.

3.3. Develop a school culture that cultivates, engages and inspires participation.

3.4. Maintain a balance between Waldorf practices and Common Core State Standards

Goal Three - Continuation

Actions:

1. Provide up to a nine hour day of instruction (TK-6) conducive to student learning with appropriate CCSS instructional materials throughout the school year.
2. Review and monitor progress towards standards, assess needs, and implement RTI as necessary.
3. Students acquire and practice a range of essential skills that are based on Waldorf pedagogy and CCSS that teachers evaluate as part of grade reports.
4. Teach practices social inclusion, development of positive attitudes and tolerance of differences.
5. Participate in a rich school culture including: service projects, festivals, field trips, theater and drama, and musical performances.

Goal Four - Student Engagement and School Climate

4.1 Student attendance rate at or above 94% and a

4.2 Chronic absenteeism rate under 10% with

4.3 No Middle School dropouts.

4.4 Suspension rate lower than 3% and expulsion rate lower than 1%

4.2 Provide a healthy, supportive school climate for academic, social, and emotional growth

Actions:

1. Live Oak will provide a safe, nurturing and positive learning environment with consistent information on the importance of school attendance to students and parents.
2. Parents and students will be informed of our attendance policies, and LO will communicate (e.g. mail, phone, emails) with parents of chronically absent students to improve attendance.
3. Our middle school teachers will have time to discuss and collaborate on best practices with middle school students on a weekly basis.
4. Live Oak will review Suspension and Expulsion policies annually and will formally administer feedback surveys to students, staff, and families annually on school climate.

Goal Five - Local Goals

- 5.1: Provide high quality Public Waldorf programs, faculty, staff, and administration.
- 5.2: Ensure the long-term sustainability and financial stability of the school.
- 5.3: Continue to provide a robust academic student support / Response-to-Intervention (RTI) program as part of an effective overall Multi-tiered System of Support (MTSS).
- 5.4: Continue to develop Special Education expertise, resources, and overall program.
- 5.5: Develop a robust social emotional learning support program.

Goal Five - Continuation

Actions:

5.1.1 Maintain competitive faculty and staff salaries and benefits; deliver a quality core Public Waldorf educational program along with a multi-tiered system of support, enhanced Waldorf educational programs, school operations and support functions, and effective school management and administration.

5.1.2 Recruit and retain highly qualified and high quality teachers and staff. Hire experienced teachers and staff as needed.

5.1.3 Provide opportunities for professional development and training, including Waldorf academic and professional conferences.

5.1.4 Use collaborative approach model within the loop groups to develop content and curriculum, best practices, and data analysis.

5.1.5 Provide stipends for school leadership and other vital functions outside of normal duties.

Goal Five - Continuation

Actions:

5.2.1: Develop positive and collaborative relationship with sponsoring district. Have a LOCS BOD representative to attend PCS board meetings. Provide audits/reports in a timely manner.

5.2.2.: Continue membership and participation in leading charter school advocacy and support organizations (AFPWE and CSDC).

5.2.3: Continue strong governance tradition and continue board development and recruitment.

5.2.4: Continue strong history of prudent fiscal management. Continue with and look at new business services consortium model opportunities with our sister Waldorf charter schools to leverage and share financial leadership resources more effectively.

5.2.5: Conduct Annual Audit and prepare filing of IRS Form 990 and CalFTB Form 199. The Forms 990 and 199 will be prepared by business services consortium staff.

Goal - Five continued

Actions:

5.3.1: Further develop RTI program in 2021-22

5.3.2: Identify specific options for new grade level benchmark assessments of ELA and Math to determine student RTI need.

5.3.3: Provide General Education RTI activities including hearing and vision screening.

5.4.1: Collaborate with PCS SPED team to align student services with needs.

5.5.1: Continue to develop RJ practices as well as provide student counselors.



LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Live Oak Charter School

CDS Code: 49708546119036

School Year: 2022-23

LEA contact information:

Justin Tomola

Executive Director

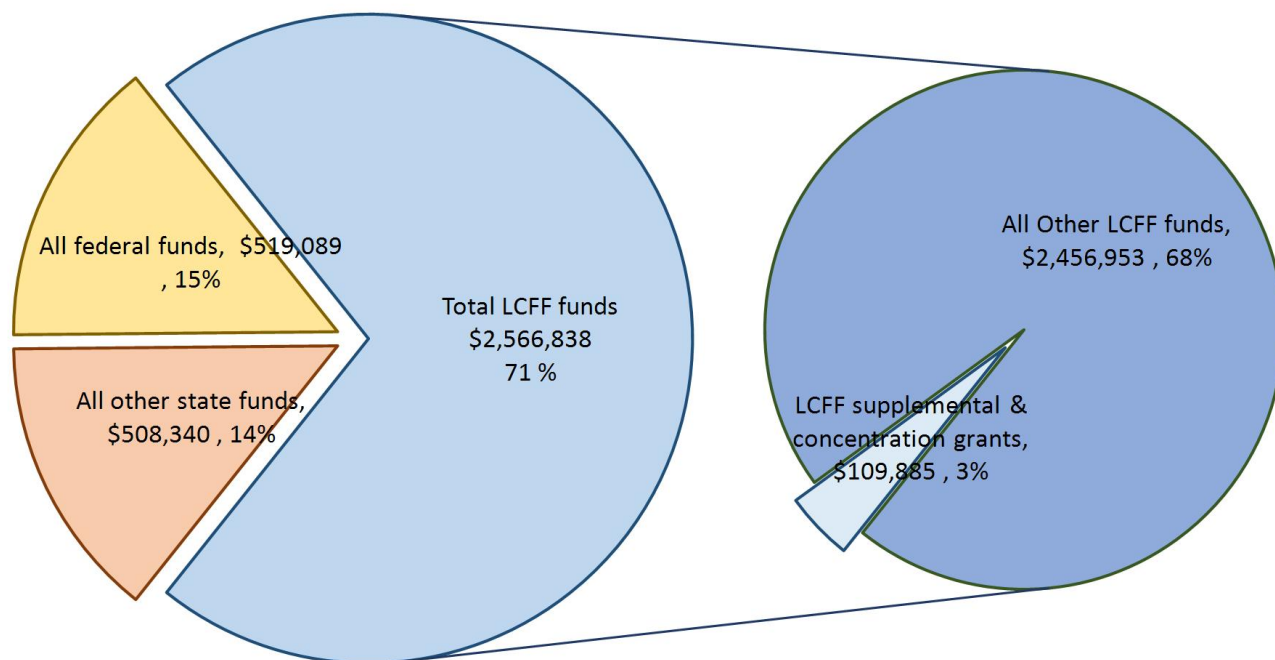
justin.tomola@liveoakcharter.org

707-762-9020

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

Budget Overview for the 2022-23 School Year

Projected Revenue by Fund Source

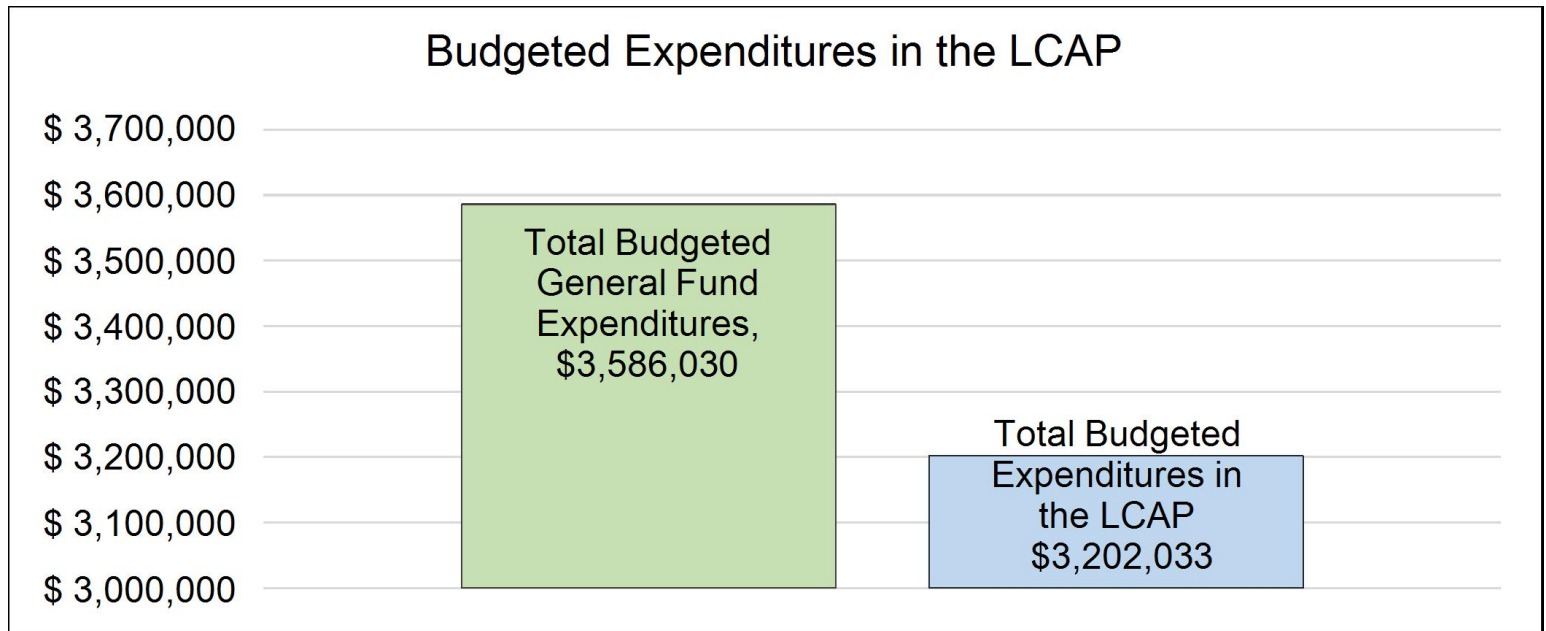


This chart shows the total general purpose revenue Live Oak Charter School expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Live Oak Charter School is \$3610767, of which \$2566838 is Local Control Funding Formula (LCFF), \$508340 is other state funds, \$ is local funds, and \$519089 is federal funds. Of the \$2566838 in LCFF Funds, \$109885 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Live Oak Charter School plans to spend for 2022-23. It shows how much of the total is tied to planned actions and services in the LCAP.

The text description of the above chart is as follows: Live Oak Charter School plans to spend \$3586030 for the 2022-23 school year. Of that amount, \$3202033 is tied to actions/services in the LCAP and \$383997 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

Facilities Leases (56xx); Other Facilities Costs (54xx, 55xx, and 56xx - insurance, utilities, repairs, rentals); Postage, Communications & Data Processing Costs (59xx); Other/General Supplies (4340, 435x, some 4390)

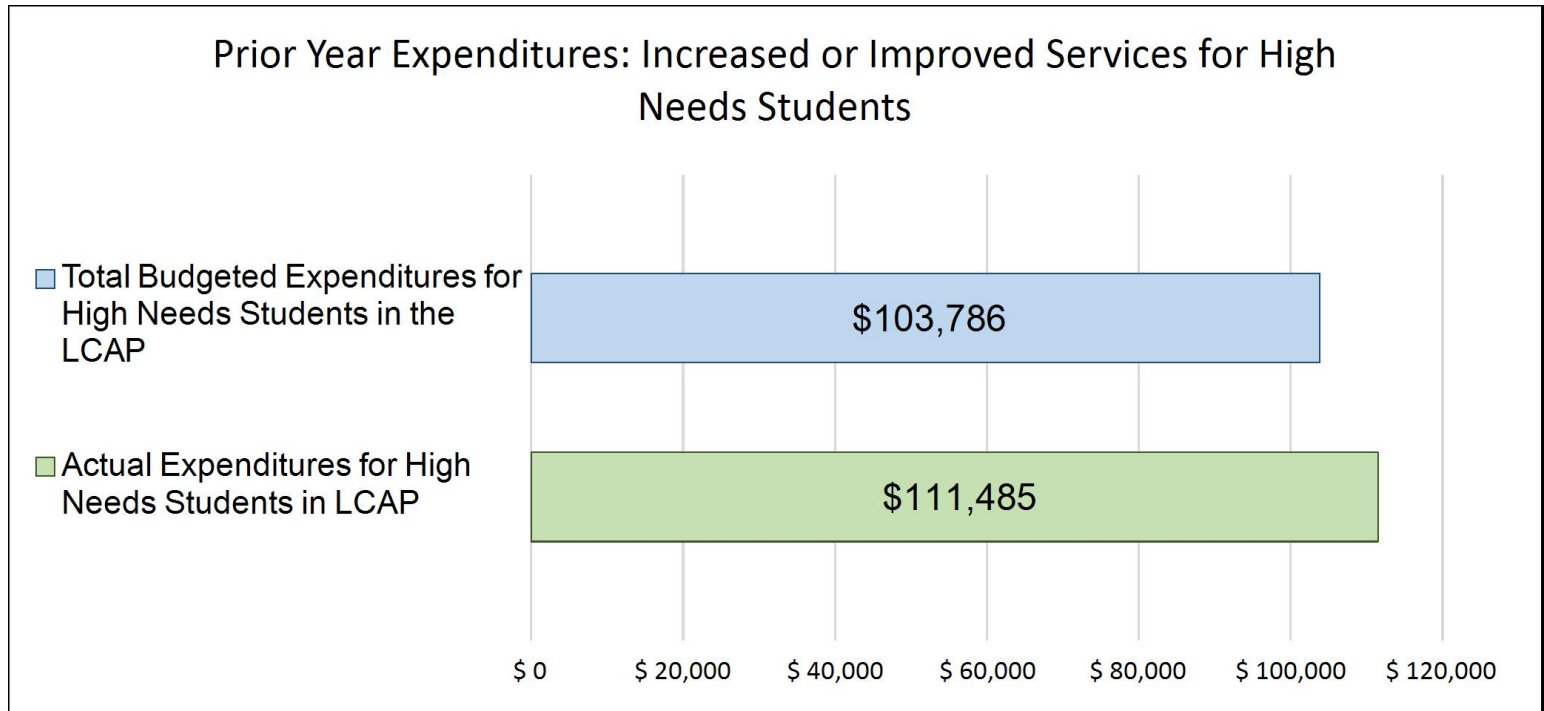
Increased or Improved Services for High Needs Students in the LCAP for the 2022-23 School Year

In 2022-23, Live Oak Charter School is projecting it will receive \$109885 based on the enrollment of foster youth, English learner, and low-income students. Live Oak Charter School must describe how it intends to increase or improve services for high needs students in the LCAP. Live Oak Charter School plans to spend \$273,745 towards meeting this requirement, as described in the LCAP.

Please see the relevant sections of the LCAP.

LCFF Budget Overview for Parents

Update on Increased or Improved Services for High Needs Students in 2021-22



This chart compares what Live Oak Charter School budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Live Oak Charter School estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2021-22, Live Oak Charter School's LCAP budgeted \$103,786 for planned actions to increase or improve services for high needs students. Live Oak Charter School actually spent \$111,485 for actions to increase or improve services for high needs students in 2021-22.

The difference between the budgeted and actual expenditures of \$7,699 had the following impact on Live Oak Charter School's ability to increase or improve services for high needs students:

Additional Services were provided.



Supplement to the Annual Update to the 2021–22 Local Control and Accountability Plan

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Live Oak Charter School	Justin Tomola Executive Director	justin.tomola@liveoakcharter.org 7077629020

California's 2021–22 Budget Act, the federal American Rescue Plan Act of 2021, and other state and federal relief acts have provided local educational agencies (LEAs) with a significant increase in funding to support students, teachers, staff, and their communities in recovering from the COVID-19 pandemic and to address the impacts of distance learning on students. The following is a one-time mid-year report to the local governing board or body and educational partners related to engagement on, and implementation of, these Acts.

A description of how and when the LEA engaged, or plans to engage, its educational partners on the use of funds provided through the Budget Act of 2021 that were not included in the 2020–21 Local Control and Accountability Plan (LCAP).

The school did NOT receive additional funding through the Budget Act of 2021 that it would typically include in its LCAP. Additional funding that was received or is expected to be received ALL required separate/individual plans that have been or are in process of being completed. Plans for each of these programs was developed according to the specific requirements of each program and were reviewed and approved in

accordance with the requirements of each funding source in addition to being reviewed with appropriate faculty and staff at regular staff meetings conducted between August and December 2021 and in regular public board meetings over the same period. The only additional funding received through the Budget Act by the school was:

- Educator Effectiveness Grant
- Expanded Learning Opportunity Program
- Universal PreK Planning Grant

A description of how the LEA used, or plans to use, the additional concentration grant add-on funding it received to increase the number of staff who provide direct services to students on school campuses with an enrollment of students who are low-income, English learners, and/or foster youth that is greater than 55 percent.

The school did NOT receive any additional concentration grant funding.

A description of how and when the LEA engaged its educational partners on the use of one-time federal funds received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on pupils.

The use of one-time Federal funds was included in the regular development of the 21-22 LCAP, 21-22 Board Approved Operating Budget, and 21-22 First Interim Budget Revision. Please refer to the schools 21-22 LCAP for details of the engagement process.

A description of how the LEA is implementing the federal American Rescue Plan Act and federal Elementary and Secondary School Emergency Relief expenditure plan, and the successes and challenges experienced during implementation.

The use of ESSER II and ESSER III funds was included in the development of the school's 21-22 Operating Budget and 21-22 First Interim Budget Revision and also in the school's ESSER III Expenditure Plan which can be found on the school's website: www.liveoakcharter.org

Uses of ESSER II and ESSER III Funds:

1. PPE / Public Health Expenditures: Successes/Challenges – The school purchased PPE, cleaning supplies, and additional cleaning services in addition to purchasing HEPA and MERV rated filters for each classroom. The school would have liked to provide additional equipment and services but was limited due to the amount of funding received.

2. In-Person Instruction, Facilities, and Operating Costs: Upgrades: Successes/Challenges - The school upgraded facilities for comprehensive outdoor learning spaces for Grades TK-8 in order to accommodate the return to in-person learning. Funds were used primarily for the operating costs and contracted services relating to providing a safe, clean and well maintained In -Person learning environment including additional classroom cleaning services, handwashing stations, portable bathrooms, purchase of materials to provide shade. School volunteers provided the labor for erecting shade structures and outdoor seating (haybales) thereby cutting down on the overall cost. The school also invested in replacing servicing and cleaning all HVAC units and ducts including upgrading/replacing HVAC filters.

3. RTI/Academic Support Services: Successes/Challenges – The school has been able to provide additional academic student support services to facilitate Learning Recovery as part of the school’s overall Multi-tiered System of Supports. The school would have liked to provide additional services and resources but was limited due to the amount of funding received.

4. RTI/Academic Support Curriculum and Materials: Successes/Challenges – The school has been able to invest in additional curriculum and learning materials to facilitate Learning Recovery as part of the school’s overall Multi-tiered System of Supports. The school would have liked to provide additional resources but was limited due to the amount of funding received.

5. Training/Mentoring: Successes/Challenges – The school has been able to provide additional training and mentoring for teachers and staff. The school will supplement and extend these efforts using additional funding received through the Educator Effectiveness Grant. The school would have liked to provide additional services and resources but was limited due to the amount of funding received.

6. School Nutrition Program Services: Successes/Challenges – The school was able to provide nutritionally compliant, legally mandated meals to students through all phases of school reopening. The school would have liked to provide additional services and resources but was limited due to the amount of funding received.

A description of how the LEA is using its fiscal resources received for the 2021–22 school year in a manner that is consistent with the applicable plans and is aligned with the LEA’s 2021–22 LCAP and Annual Update.

Live Oak Charter School is using the fiscal resources received for the 21-22 school year in alignment with our LCAP. As delineated in Item 1 above. The funding has either already been included in the school’s 21-22 LCAP or has been included in a separate plan.

Below is how the additional funding supports LCAP goals:

1. PPE / Public Health Expenditures – supports LCAP* Action 4
2. In-Person Instruction, Facilities, Operating costs – supports LCAP* Action 8
3. RTI/Academic Support Services – supports LCAP Goal #5 Actions 11, 12, 15
4. RTI/Academic Support Curriculum and Materials – supports LCAP Goals #5 Actions 11, 12, 15

- 5. Training/Mentoring – supports LCAP* Action 6
 - 6. School Nutrition Program Services – supports LCAP* Action 19
- *Learning Continuity and Attendance Plan

Instructions for the Supplement to the Annual Update for the 2021–22 Local Control and Accountability Plan Year

For additional questions or technical assistance related to the completion of the Supplement to the Annual Update to the 2021–22 Local Control and Accountability Plan (LCAP), please contact the local county office of education (COE), or the California Department of Education’s (CDE’s) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at lcff@cde.ca.gov.

Introduction

California’s 2021–22 Budget Act, the federal American Rescue Plan Act of 2021, and other state and federal relief acts have provided local educational agencies (LEAs) with a significant increase in funding to support students, teachers, staff, and their communities in recovering from the COVID-19 pandemic and to address the impacts of distance learning on students. Section 124(e) of Assembly Bill 130 requires LEAs to present an update on the Annual Update to the 2021–22 LCAP and Budget Overview for Parents on or before February 28, 2022, at a regularly scheduled meeting of the governing board or body of the LEA. At this meeting, the LEA must include all of the following:

- The Supplement to the Annual Update for the 2021–22 LCAP (2021–22 Supplement);
- All available mid-year outcome data related to metrics identified in the 2021–22 LCAP; and
- Mid-year expenditure and implementation data on all actions identified in the 2021–22 LCAP.

When reporting available mid-year outcome, expenditure, and implementation data, LEAs have flexibility to provide this information as best suits the local context, provided that it is succinct and contains a level of detail that is meaningful and accessible for the LEA’s educational partners.

The 2021–22 Supplement is considered part of the 2022–23 LCAP for the purposes of adoption, review, and approval, and must be included with the LCAP as follows:

- The 2022–23 Budget Overview for Parents
- The 2021–22 Supplement
- The 2022–23 LCAP
- The Action Tables for the 2022–23 LCAP

- The Instructions for the LCAP Template

As such, the 2021–22 Supplement will be submitted for review and approval as part of the LEA's 2022–23 LCAP.

Instructions

Respond to the following prompts, as required. In responding to these prompts, LEAs must, to the greatest extent practicable, provide succinct responses that contain a level of detail that will be meaningful and accessible for the LEA's educational partners and the broader public and must, to the greatest extent practicable, use language that is understandable and accessible to parents.

In responding to these prompts, the LEA has flexibility to reference information provided in other planning documents. An LEA that chooses to reference information provided in other planning documents must identify the plan(s) being referenced, where the plan(s) are located (such as a link to a web page), and where in the plan the information being referenced may be found.

Prompt 1: *“A description of how and when the LEA engaged, or plans to engage, its educational partners on the use of funds provided through the Budget Act of 2021 that were not included in the 2020–21 Local Control and Accountability Plan (LCAP).”*

In general, LEAs have flexibility in deciding what funds are included in the LCAP and to what extent those funds are included. If the LEA received funding through the Budget Act of 2021 that it would have typically included within its LCAP, identify the funds provided in the Budget Act of 2021 that were not included in the LCAP and provide a description of how the LEA has engaged its educational partners on the use of funds. If an LEA included the applicable funds in its adopted 2021–22 LCAP, provide this explanation.

Prompt 2: *“A description of how LEA used, or plans to use, the concentration grant add-on funding it received to increase the number of staff who provide direct services to students on school campuses with an enrollment of students who are low-income, English learners, and/or foster youth that is greater than 55 percent.”*

If LEA does not receive a concentration grant or the concentration grant add-on, provide this explanation.

Describe how the LEA is using, or plans to use, the concentration grant add-on funds received consistent with California *Education Code* Section 42238.02, as amended, to increase the number of certificated staff, classified staff, or both, including custodial staff, who provide direct services to students on school campuses with greater than 55 percent unduplicated pupil enrollment, as compared to schools with an enrollment of unduplicated students that is equal to or less than 55 percent.

In the event that the additional concentration grant add-on is not sufficient to increase the number of staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, describe how the LEA is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Prompt 3: *“A description of how and when the LEA engaged its educational partners on the use of one-time federal funds received that are*

intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on pupils.”

If the LEA did not receive one-time federal funding to support recovery from the COVID-19 pandemic and the impacts of distance learning on students, provide this explanation.

Describe how and when the LEA engaged its educational partners on the use of one-time federal funds it received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on students. See the COVID-19 Relief Funding Summary Sheet web page (<https://www.cde.ca.gov/fq/cr/relieffunds.asp>) for a listing of COVID-19 relief funding and the Federal Stimulus Funding web page (<https://www.cde.ca.gov/fq/cr/>) for additional information on these funds. The LEA is not required to describe engagement that has taken place related to state funds.

Prompt 4: “A description of how the LEA is implementing the federal American Rescue Plan Act and federal Elementary and Secondary School Emergency Relief expenditure plan, and the successes and challenges experienced during implementation.”

If an LEA does not receive ESSER III funding, provide this explanation.

Describe the LEA’s implementation of its efforts to maintain the health and safety of students, educators, and other staff and ensure the continuity of services, as required by the federal American Rescue Plan Act of 2021, and its implementation of the federal Elementary and Secondary School Emergency Relief (ESSER) expenditure plan to date, including successes and challenges.

Prompt 5: “A description of how the LEA is using its fiscal resources received for the 2021–22 school year in a manner that is consistent with the applicable plans and is aligned with the LEA’s 2021–22 LCAP and Annual Update.”

Summarize how the LEA is using its fiscal resources received for the 2021–22 school year to implement the requirements of applicable plans in a manner that is aligned with the LEA’s 2021–22 LCAP. For purposes of responding to this prompt, “applicable plans” include the Safe Return to In-Person Instruction and Continuity of Services Plan and the ESSER III Expenditure Plan.

California Department of Education
November 2021



Local Control Accountability Plan

The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Live Oak Charter School	Justin Tomola Executive Director	director@liveoakcharter.org 707-762-9020

Plan Summary [2022-23]

General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA.

Live Oak Charter School is a K-8 program that can serve up to approximately 300 students in the Petaluma area. Live Oak is Chartered by the Petaluma Elementary School Districts (PCS). Its most recent charter was approved for 5 years from 2019-2020 to 2024-2025 (with a granted two year extension due to the pandemic). Live Oak is a 501c(3) non-profit direct funded independent charter school and operates with a 7 person board. Live Oak’s campus is on the Sonoma Marin Fairgrounds at 100 GROSS Concourse, Petaluma CA.

Live Oak Charter School is a community dedicated to using educational methods guided by the Core Principles of Public Waldorf Education. Our students are 20% socioeconomically disadvantaged, 4% are English Learners and 10% are Students with disabilities. Demographics include 82% Caucasian, 9% mixed race/ethnicity, 7% Hispanic, 1% Asian, 1% African American. The majority of students reside in the Petaluma vicinity, however, there is a significant portion of students that commute from towns more than 10 miles away to attend the school and 20% qualify for free and reduced meals.

We integrate the Core Principles of Public Waldorf Education with current best educational practices and California Common Core State Standards. Our teachers nurture the imagination in the early years in order to build a foundation for abstract thinking. The child's intellect is appropriately challenged in the middle years and through 8th grade. This education places equal emphasis on a solid academic foundation, artistic expression, social/emotional development, and attention to the inner life of the child. An integrated project-based approach to learning emphasizes the child's relationship to the natural world thereby promoting respect for the environment and humankind. We nurture the whole child with the objective of enabling students to become self-motivated, competent life-long learners.

Live Oak offers an interdisciplinary liberal arts program where art, music, and movement are integrated with core academic instruction. Exploration of the natural world, human culture, language and mathematics enlivens curiosity which is the foundation of intellectual growth, conceptual flexibility, empathy and sense of connectedness.

Through the engagement and support of our families and local community, Live Oak is able to extend the scope of public education beyond the academic cores. Parent involvement creates a seamless experience for students, wherein family life and academic life are unified and mutually supportive. A broad system of volunteer parent coordination including quarterly parent meetings, twice monthly parent coordinator meetings, multiple communications systems, calendaring, frequent seasonal events, and performances create a vibrant embedded culture of parent/guardian engagement.

We are committed to working out of our School's Core Values of:

Wisdom
Strength
Purpose
Compassion
Action

While adhering to our Core Values along with the Core Principles of Public Waldorf Education, we are committed to fulfilling our Mission Statement: To ensure the humanity and potential of its students through an education resonant with their unfolding awareness and capacities, and supportive of the full and integrated development of body, heart, and mind.

Reflections: Successes

A description of successes and/or progress based on a review of the California School Dashboard (Dashboard) and local data.

Due to the impacts of COVID-19, the 2020-21 CAASPP results will not be used for accountability reporting this year. It is expected that the California Dashboard will publish Live Oak Charter School results in the format as reported below in the fall of the 2022 - 2023 school year.

Based on the most recent California Dashboard released fall 2019, the charter school is pleased to report the following results:

Our overall English Language Arts score is labeled as Blue, the highest level. For All Students, the overall result was 32.6 points above standard. We experienced an overall increase in our score over last year by 16.2 points. The State of California average score is 2.5 points below standard. A group of students labeled Socioeconomically Disadvantaged, scored at 4.6 points above standard, which was an increase of 31.3 points over last year. A group of students labeled White, scored 34.4 points above standard, which was an increase of 16.4 points over last year. A group of students (14 pupils) labeled Two or More Races, scored 29.1 points above standard, which was an increase of 9.5 points over last year. A group of students labeled Students with Disabilities (32 pupils), scored 58.5 points below standard, which was an increase of 16 points over last year.

Our overall Math score is labeled as Blue, the highest level. For All Students, the overall result was 7.6 points above standard. We experienced an overall increase in our score over last year by 15.4 points. The State of California score is 33.5 points below standard. A group of students (33 pupils) labeled Socioeconomically Disadvantaged, scored at 24.9 points below standard, which was labeled green as increased with an increase of 43.8 points. A group of students labeled White, scored 9.9 points above standard, which was an increase of 14.7 points over last year. A group of students (14 pupils) labeled Two or More Races, scored 7.7 points above standard, which was an increase of 41.7 points over the previous year. A group of students labeled Students with Disabilities (32 pupils), scored 60.7 points below standard, which was an increase of 22.7 points over last year.

Our overall suspension rate is labeled as Orange (second lowest level). For All Students, the overall result was “1.6% suspended at least once” out of 297 students. We experienced an overall decrease in our suspensions over last year by 0.7%. The State of California has “3.4% suspended at least once.” We believe that the restructuring of our discipline system to a restorative discipline process has successfully avoided some suspensions.

The remaining sub groups of students; African America, Asian, English Learners, Foster Youth, Hispanic, and Homeless all have less than 11 students and data that is not displayed for privacy.

Distance from Standard measures how far, on average, students are from the lowest possible score for Standard Met. The Smarter Balanced Consortium has identified Standard Met as demonstrating the knowledge and skills necessary for students to be on track for college and career readiness at their grade level.

Reflections: Identified Need

A description of any areas that need significant improvement based on a review of Dashboard and local data, including any areas of low performance and significant performance gaps among student groups on Dashboard indicators, and any steps taken to address those areas.

Due to the impacts of COVID-19, the 2020-21 CAASPP results will not be used for accountability reporting this year. It is expected that the California Dashboard will publish Live Oak Charter School results in the format as reported below in the fall of the 2022 - 2023 school year.

Based on the most recent California Dashboard released fall 2019, the charter school is recognizes the following results:

Live Oak Charter will augment student learning and enhance learning opportunities related to our LCAP goal #2. The first area of need will go towards supporting ELA and early literacy by providing Aide support who will provides direct services to the socioeconomically disadvantaged sub group which scored lower on the most recent California Dashboard data (just 4.6 above standard or green area). This Aide will be for small group and individual help in the area of early literacy intervention. Also, the literacy aide position supports students who have been identified as struggling with early literacy and English Language Arts concepts focusing on reading, decoding, phonics, and writing. These students will be identified by the teachers per our Fourtass and Pinnell Assessment data and Lucy Calkins writing rubrics.

We also will continue support of our English learner students. Although our EL data is statistically insignificant, we are gaining more EL students and it is imperative that we support them early on in the language acquisition process. These students will be identified through our home language survey. This fits within our MTSS/Response to Intervention (RTI) program that specifically addresses academic support for targeted students.

Also, math is an area of need as identified by our Dashboard indicator currently in the green for socioeconomically disadvantaged students and white students and Hispanic and low-income students. We plan to use Federal funds to support Classroom Academic Aide support in Math. The Academic Content Aide will provide direct service to students with priority to these two underperforming student groups.

The third area is mental health. During the pandemic we have seen an increase in requests for mental health supports from our general education population. We would like to offer counseling services to our students with priority given to unduplicated students. Goal 4 and 5 in our LCAP outlines student services and supports both academic and social emotional learning. Counseling for students available five days a week was provided during 21/22 school year.

Lastly, we want to continue monitoring our overall Chronic Absenteeism rate is labeled as Yellow (third lowest level). For All Students, the overall result was "7.9% chronically absent. The State of California has 10.1% for chronically absent. We experienced an overall increase in this category over last year at 1.1%. A group of students labeled Socioeconomically Disadvantaged were 9.1% chronically absent, which was an decrease of 3%. A group of students labeled White (258 pupils) were 8.1% chronically absent, which was maintained at 0%. A group of students labeled Two or More Races were 7.4% chronically absent, which was an decrease of 5.9%. A group of students labeled Hispanic (15 pupils) were 6.7% chronically absent, which was an increase of 2.3%. A group of students labeled Students with Disabilities were 2.4% chronically absent, which was a decrease of 5.7% (Blue). Many of these absences were due to extra absences beyond the days school was

closed related to the local fires and resulting evacuations. We have made improved efforts with our communication platforms with parents by adding Parent Square and we expect improved results.

LCAP Highlights

A brief overview of the LCAP, including any key features that should be emphasized.

Goal 1: Basic Services and CCSS implementation:

- 1.1. Core teachers are required to hold a valid CA Teaching Credential or be working toward their credential with appropriate English Learner authorization as defined by the CA Commission on Teaching Credentialing. Teachers will also be appropriately assigned per credentialing requirements as these pertain to Charter Schools.
- 1.2. Students have access to Common Core State Standards-aligned instructional materials as applicable to the school's Waldorf-methods based curriculum
- 1.3. School facilities are maintained clean, safe and in good repair.
- 1.4 All students, including Students With Disabilities (SWDs), have free access to two meals a day via the National Lunch Program.

Goal 2: Parental Involvement:

- 2.1. Live Oak will continue to provide opportunities for parent involvement through: volunteer opportunities; input on the school's board and on school committees; and input for goals, priorities and decision-making.

Goal 3: Pupil Achievement, Outcomes and Course Access

- 3.1 Live Oak students, in all applicable grade levels, will score at an equal or higher proficiency rate than local surrounding schools in ELA/Literacy and Math in CAASPP Statewide assessments
- 3.2. Live Oak students, in grades 3-8 will take quarterly benchmark assessments with at least 90% participation rate.
- 3.3 Maintain a balance between academic achievement and Waldorf practices in English, social sciences, physical education, science, mathematics, and visual and performing arts.
- 3.4. Waldorf and Common Core State Standards-based instruction
- 3.5. Positive Student Character Development, social emotional proficiency, and Restorative Justice practices
- 3.6. School culture that cultivates, engages and inspires participation

Goal 4: Pupil Engagement and School Climate

- 4.1. School Attendance rates of higher than 93%
- 4.2. Low levels of chronic absenteeism
- 4.3. No middle school dropouts
- 4.4. Suspension rates of less than 3%; and
- 4.5. Expulsion rates of less than 1%.
- 4.6. LOCS will generally strive to reduce the number of absences

Goal 5: Local Goals

- 5.1. Provide high quality Public Waldorf programs, faculty, staff, and administration.
- 5.2. Ensure the long-term sustainability and financial stability of the school.
- 5.3. Continue to provide a robust academic student support / Response-to-Intervention (RTI) program as part of an effective overall Multi-tiered System of Support (MTSS).
- 5.4. Continue to develop Special Education expertise, resources, and overall program.
- 5.5. Develop a robust social emotional learning support program.

Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

Not Applicable

Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

Not Applicable

Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

Not Applicable

Engaging Educational Partners

A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP.

Generally speaking, the charter school engages its stakeholders and solicits and receives feedback from stakeholders on an ongoing basis. Specifically, the charter school consulted with and received feedback from teachers, administrators, staff, parents, and students on school culture, performance, and needs in a variety of ways including but not limited to: surveys, faculty meetings, board meetings, facility planning meetings, staff meetings, classroom discussions, class parent meetings, class coordinator meetings, Town Halls, and one-on-one and small group discussions. Teachers, staff, and administrators meet regularly with parents, both individually and as a class group and that feedback is factored into school planning. Additionally, since COVID, we formed a new group of parents, BOD members and Ed Foundation members and I have regularly planned meetings to review and discuss parent questions, concerns and provide feedback and input on what's occurred during this year and what might be needed in the coming year(s) .

As part of its annual LCAP process the school has instituted an annual survey which is distributed to all parents of the school to obtain specific feedback on school performance as well as input into school goals and priorities, including those specifically in our Local Control Accountability Plan (LCAP). In addition, the school has also implemented an annual survey which is administered to our 6th, 7th and 8th grade students to obtain feedback on performance and input into goals as well as an annual survey to all faculty and staff. The results of the surveys were reviewed and considered in the creation of the goals and actions of the LCAP. Specific feedback is located within each of the goals as reflected in the parent survey.

The Executive Director and his staff are responsible for factoring all of the above into developing the LCAP, the annual update, and the budget and presenting these to the school community for review and comment. Detailed survey results and commentary were provided as well as presented during a public school board meeting. LCAP Goal Setting was included on all regular board meeting agendas and discussed at those meetings from April through June. All board meeting agendas and related materials are published on the school's website along with board meeting dates and community participation is encouraged. Board meeting dates and times are published on the school's online calendar on its website.

Annual Update: Feedback received over the course of the year, especially from the annual parent, faculty, and student surveys, was factored into the development of the annual update. The survey provided ample space for written comments so that parents could provide detailed feedback on school performance, priorities, and goals.

A summary of the feedback provided by specific educational partners.

Coming back to in-person learning presented some challenges. Students' high level of anxiety returning to a classroom, especially in the younger grades was evident in addition to continuing to provide for a full day of classroom instruction under COVID restrictions due to ongoing presence of the pandemic. Throughout the year, we provided information via our communication platform ParentSquare as well as opportunities for input/feedback via Town Hall meetings, and parent Question and Answer (Q&A) email exchanges. Additionally, parents had direct communication both two way and via email to discuss any ongoing concerns with their teachers, Admin staff, and/or school counselors.

Throughout the year, parents shared the importance of student mental health and challenges with peer to peer physical and emotional safety.

Additionally, based on survey results parents and teachers are generally satisfied with the quality of instruction, the breadth and depth of the Waldorf-methods curriculum, the support that their children receive from teachers and staff, and the programs offered by the school. For example, on the Faculty and Staff survey, 93 percent either strongly agree or agree that Live Oak provides for strong Waldorf curriculum and pedagogical methods as well as 87% strongly agree or agree that we provide a rigorous academic program. In terms of our new parent communication platform, 80% of faculty and staff believe they use ParentSquare to communicate effectively and efficiently with parents.

Community stakeholders were generally pleased with the efforts that the school has undertaken to implement a more comprehensive student and community supports. The highest priorities identified were to continue to offer a quality Waldorf-methods curriculum including Specialty classes to the fullest extent possible and continuing to develop community connection and to plan for long range goals such as facilities. Additional areas of desired focus per our 21/22 Parent Survey included: continuing to offer Social-Emotional Wellness programming, Specialty classes, and improve student support and services. Due to AB 1505, our teacher development includes support in the credentialing process of our Specialty teachers until 2025. Also, we continue to prioritize expanding the gardening/beautification program to the middle school, and continuing to attract/retain high-quality teachers.

A description of the aspects of the LCAP that were influenced by specific input from educational partners.

As we align the 8 State priorities with our Charter goals as outlined in our approved Charter document along with our LCAP, we maintain consistency in our mission and focus. During this year and due to COVID, much stakeholder input focused on the return to on-site instruction and the mitigation of learning loss that occurred as a result of the extended period of remote learning during the pandemic.

For goal 1, specifically, 1.3. School facilities are maintained clean, safe and in good repair: Parents along with faculty and staff hold a high value on ensuring our facilities is in good physical repair as well as having a safe and healthy school culture.

For goal Goal 2: Parental Involvement: Parent involvement is a cornerstone of our community and school operations. During COVID we had an increase of demand for communication and an increase in parent volunteers. We continue to improve our communication efforts and develop and grow through new platforms like Parent Square. This focus is brought into view by feedback from parents and their need to provide feedback. We continue to provide a tremendous amount of opportunity for parent engagement including but not limited to: The planning of and participation of school wide festivals and celebrations, class parent meetings with the teacher, parent teacher conferences, back to school, Open House, field trip planning and chaperoning, volunteer community response team, partnership with our Foundation, parent surveys, classroom coordinator meetings, individual student/parent check-ins, and our ParentSquare communication platform.

For Goal 3: Student achievement and Outcomes: BOD members and faculty provided feedback that formative assessment data helps to develop a robust understanding how students are doing and where they are academically. We plan to continue to use formative assessments regularly and review this data at least once a quarter.

For Goal 4: Pupil Engagement and Attendance: Attendance is the most significant reason students do well in school. It is imperative not only because we want students to be at school so they can learn and be successful but also because we are a direct funded Charter School, that attendance remains a goal.

For Goal 5: Local goals: From our parent survey and tours, we know parents choose Live Oak because it is a Waldorf inspired school. Also, we know from our RTI program and Student Study Team meetings that parents who have students struggle in school and who are not identified as SPED students want to give their students access to general education interventions.

Goals and Actions

Goal

Goal #	Description
1	<p>General Notes: Some general notes on the 2021-22 LCAP:</p> <p>The school's teachers and administration engage in a plethora of initiatives, activities, and functions that cut across many of the goals listed in this LCAP. While it is not efficacious or practical to calculate the time spent and related cost of salary and benefits that apply to each of the goals and sub-goals detailed in this LCAP we have attempted to break out salary and benefits by major academic program or business function. We have listed the full cost of the school's salaries and benefits as well as the break out by program/function. We have referenced these sub-goals whenever teacher, staff or administrative effort was expected in meeting the below goals.</p> <p>In some cases (e.g. Training and Professional Development) the same budget line item/reference pertains to different goals and actions. We have referenced the primary Goal for the budget line/reference for situations where this has occurred.</p> <p>Charter Schools are only required to report on Goals and Actions pertaining to the current Annual Budget Year. Overall effectiveness in meeting the terms of the school's Charter (Elements 2 and 3 of the Charter Petition) is tracked on an annual basis and is considered as part of the 5-year charter renewal process. School Districts do not have the same obligations as documented in a Charter document and have different reporting requirements such as developing a three-year plan. As such, to simplify reporting and formatting, it is generally understood in each section that reporting for Year 2, Year 3, and Year 4 are not applicable and the template has been modified accordingly.</p> <p>BASIC SERVICES:</p> <p>1.1. Core teachers are required to hold a valid CA Teaching Credential or be working toward their credential with appropriate English Learner authorization as defined by the CA Commission on Teaching Credentialing. Teachers will also be appropriately assigned per credentialing requirements.</p> <p>1.2. All students, including Students With Disabilities (SWDs) have access to Common Core State Standards-aligned instructional materials as applicable to the school's Waldorf-methods based curriculum</p> <p>1.3. School facilities are maintained clean, safe and in good repair</p> <p>1.4 All students, including SWDs, have free access to two meals a day via the National Lunch Program.</p>

An explanation of why the LEA has developed this goal.

State Priorities: 1 – Basic Services

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Annual SARC Report on teacher credentials and Annual Report to District.	100% of teachers holding adequate credentials and appropriately assigned per AB 1505 criteria	100% of teachers holding adequate credentials and appropriately assigned.	Not Applicable	Not Applicable	Not Applicable
Instructional materials, supplies, and equipment purchased and in stock or on order	Instructional materials, supplies, and equipment purchased and in stock or on order	Instructional materials, supplies, and equipment purchased and in stock or on order	Not Applicable	Not Applicable	Not Applicable
Most instructional materials are Common Core State Standards aligned as applicable within the school's Waldorf-methods based curriculum	Most instructional materials are Common Core State Standards aligned as applicable within the school's Waldorf-methods based curriculum	Most instructional materials are Common Core State Standards aligned as applicable within the school's Waldorf-methods based curriculum	Not Applicable	Not Applicable	Not Applicable
Most instructional materials are Waldorf program aligned	Most instructional materials are Waldorf program aligned	Most instructional materials are Waldorf program aligned	Not Applicable	Not Applicable	Not Applicable
Daily / Monthly / Annual facility inspections as appropriate. [See General Note 2 above]	Positive bi-annual RESIG school facilities safety audit. Updated and active maintenance and	Updated and active maintenance and safety log and site inspection documents	Not Applicable	Not Applicable	Not Applicable

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
	safety log and site inspection documents				
Meal tracking and daily orders	Current program serves pre-ordered meal once daily.	Pre-ordered free meals for any student, including SWD, twice daily.	Not Applicable	Not Applicable	Not Applicable

Actions

Action #	Title	Description	Total Funds	Contributing
1.1	Teacher Credentialing	Live Oak conducts credential review as part of teacher hiring process.		No
1.2	Teacher credential review/audits	Live Oak conducts regular audits of Charter School teacher credentials to ensure compliance.		No
1.3	Teacher credential monitoring	Live Oak informs credentialed staff when credentials are near expiration		No
1.4	Classroom materials and equipment	Live Oak ensures adequate budget for (1) textbooks and reference materials, (2) instructional materials, and (3) classroom equipment. LO will continue to invest in computers and its instrument inventory. (Obj 4110, 4210, 4310, 4400)	\$39,950.00	No
1.5	Custodial service and Maintaining campus	Live Oak provides general cleaning by custodial services and school community will maintain campus cleanliness (Obj 4370 JANI, 4390 MNTN, 5550)	\$43,300.00	No

Action #	Title	Description	Total Funds	Contributing
1.6	National School Breakfast and Lunch Program	Live Oak contracts with Petaluma City Schools to provide two meals daily including the use of CresCor Re-Therm oven. See Goal 5 for costs		No

Goal Analysis [2021-22]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Actions were implemented as intended.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Lower expected cleaning costs post-Covid; expected increases in materials and personnel costs; additional lunch program costs due to addition of breakfast program in 22-23

An explanation of how effective the specific actions were in making progress toward the goal.

Actions supported meeting LCAP goal #1.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes were made to the goal and the desired outcomes are consistent. Due to AB 1505, with our new Music teacher, the teacher needed to be credentialed. Also, we were able to support our Movement teacher in obtaining her credential this year even though she is grandfathered in until 2025. Also, we will increase our meal offering to twice daily from once daily under the National Lunch Program.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Goals and Actions

Goal

Goal #	Description
2	Parental Involvement: 2.1. Live Oak will continue to provide opportunities for parent involvement through: volunteer opportunities, including field trips, plays, festivals, celebrations, class parent, two way communication via ParentSquare and input on school's board and parent surveys for goals and priorities.

An explanation of why the LEA has developed this goal.

State Priorities: 3 – Parent Involvement

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Sign-up sheets and turn-out for various events and classroom activities (e.g. Field Trips) show high level of involvement	Sign-up sheets and turn-out for various events and classroom activities (e.g. Field Trips) show high level of involvement	Sign up via ParentSquare, volunteer screening process and turn out for various events and classroom activities e.g. field trips) show high level of involvement	Not Applicable	Not Applicable	Not Applicable
Live Oak has parents on the charter school board and task forces	Live Oak has parents on the charter school board and task forces	Live Oak has parents on the charter school board, task forces, and Foundation	Not Applicable	Not Applicable	Not Applicable
Annual Survey results show high level of parent involvement	Annual Survey results show high level of parent involvement	Annual Survey results show high level of parent involvement	Not Applicable	Not Applicable	Not Applicable

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
and general satisfaction with the direction of the school	and general satisfaction with the direction of the school	and general satisfaction with the direction of the school			

Actions

Action #	Title	Description	Total Funds	Contributing
2.1	Community building/volunteering	Live Oak builds community by providing parent volunteer opportunities within and outside of the school. (e.g. field trips, school festivals, class plays, school fundraising, etc.) Mgmt: TRIP, Obj 4300,4390,5200,5800; 4390 FEST	\$34,000.00	No
2.2	Community building/volunteering	Live Oak provides parent volunteer opportunities in the classroom in collaboration with the classroom teacher, (e.g. inside tasks, reading groups, math tutor, handwork, and other helping roles).		No
2.3	Parent engagement	Live Oak provides opportunities for parent participation on the school board, planning teams, task forces, and other stakeholder programs		No
2.4	Stakeholder Surveys	Live Oak continues to provide an annual survey to stakeholders (parents, students, staff) to give feedback and input to the administration and Board. (See also: Section: Stakeholder Engagement).		No
2.5	Communication	Live Oak continues to hold an “open door” policy to meet with school parents to hear their ideas, suggestions, feedback, concerns, and input. Also, we continue to use ParentSquare as a communication and engagement platform.		No

Action #	Title	Description	Total Funds	Contributing
2.6	Continued engagement and development	Live Oak offers opportunities for speakers/presenters from inside and outside of the school community and other parent education events and activities. ParentSquare provides opportunities to sign up and participate in school programming (e.g., field trips, festivals, celebrations)		No
2.7	Goal 2: Overall	Costs for Goal 2 (Surveys, Parent Education, Executive Director time) are included in Total M&A Costs		No

Goal Analysis [2021-22]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Actions were implemented as intended.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

No material differences from prior year

An explanation of how effective the specific actions were in making progress toward the goal.

In the year of the pandemic, approximately 60% of parents surveyed agreed or strongly agreed that we are meeting this goal.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

We will continue to provide multiple opportunities for parent engagement including but not limited to: The planning of and participation of school wide festivals and celebrations, class parent meetings with the teacher, parent teacher conferences, back to school, Open House, field trip planning and chaperoning, volunteer community response team, partnership with our Foundation, parent surveys, classroom coordinator meetings, individual student/parent check-ins, and our ParentSquare communication platform.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Goals and Actions

Goal

Goal #	Description
3	<p>Pupil Achievement, Outcomes and Course Access</p> <p>3.1 Live Oak students, in all applicable grade levels, will score at an equal or higher proficiency rate (DFS) than local schools and/or State in ELA/Literacy and Math in CAASPP assessments</p> <p>3.2. At least 90% of students in grades 3-8 will take quarterly benchmark assessments.</p> <p>3.3 Maintain a balance between academic achievement and Waldorf practices in English, social sciences, physical education, science, mathematics, and visual and performing arts.</p> <p>3.4. Waldorf and Common Core State Standards-based instruction</p> <p>3.5. Positive Student Character Development, social emotional proficiency, and Restorative Justice practices and approaches</p> <p>3.6. School culture that cultivates, engages and inspires participation</p>

An explanation of why the LEA has developed this goal.

State Priorities: 2 – State Standards; 4 – Pupil Achievement; and 7 – Course Access; 8 – Pupil Outcomes

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
3.1: CAASPP ELA and Math Dashboard Data	The CAASPP scores show that Live Oak students score at an equal or higher proficiency rate than	The CAASPP scores show that Live Oak students score at an equal or higher proficiency rate than local and/or State	Not Applicable	Not Applicable	Not Applicable

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
	local and/or State CAASPP data.	CAASPP data. (to be updated in 22/23)			
3.2: Local benchmark data from STAR Renaissance	The data show the number of Live Oak students who take benchmark assessments on a quarterly basis.	The Star data shows that at least 90% of all 3-8 grade students took all three benchmark tests in both ELA and Math.	Not Applicable	Not Applicable	Not Applicable
3.3: CAASPP reports; classroom-level reports, mid-year reports, end-of-the-year reports, and reports for all subgroups; CELDT; IEP reports will demonstrate goal met or progress	CAASPP reports; classroom-level reports, mid-year reports, end-of-the-year reports, and reports for all subgroups; CELDT; IEP reports demonstrate goal met or progress	CAASPP reports; classroom-level reports, mid-year reports, end-of-the-year reports, and reports for all subgroups; CELDT; IEP reports demonstrate goal met or progress	Not Applicable	Not Applicable	Not Applicable
3.4: Charter petition exhibit and classroom work plans; project-based assessments; LO master schedule; classroom lesson plans will demonstrate goal met	Charter petition exhibit and classroom work plans; project-based assessments; LO master schedule; classroom lesson plans demonstrate goal met	Charter petition exhibit and classroom work plans; project-based assessments; LO master schedule; classroom lesson plans demonstrate goal met	Not Applicable	Not Applicable	Not Applicable
3.5: Teacher observations and parent feedback.	Teacher observations and parent feedback.	Teacher observations and parent feedback.	Not Applicable	Not Applicable	Not Applicable

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
3.6: Event review portion of Faculty Meeting minutes will demonstrate goal met.	Event review portion of Faculty Meeting minutes demonstrate goal met.	Event review portion of Faculty Meeting minutes will demonstrate goal met.	Not Applicable	Not Applicable	Not Applicable
3.7: Course and grade level schedule will show how all academic content is available to all students, including SWDs.	Course and grade level schedule will show how all academic content is available to all students.	Course and grade level schedule will show how all academic content is available to all students.	Not Applicable	Not Applicable	Not Applicable

Actions

Action #	Title	Description	Total Funds	Contributing
3.1	Accessible CCSS standards	Live Oak will provide instruction conducive to student learning with appropriate CCSS instructional materials throughout the school year. [Instructional Materials Costs reported in Action 1:4]		No
3.2	Benchmark Assessments	Live Oak teachers in grades 3-8 will administer the STAR test at Beginning of Year (BOY), Middle of Year (MOY) and End of Year (EOY). [Costs included in Staff Costs]		No
3.3	Integration of Waldorf and CCSS	Live Oak integrates Waldorf curriculum and Common Core State Standards, to develop and use the best instructional practices that meet the varied needs of all students.		No
3.4	Positive Student Culture	Live Oak has a culture of social inclusion where students develop positive attitudes towards their learning environment and other people.		No

Action #	Title	Description	Total Funds	Contributing
3.5	Community Building	Live Oak offers opportunities for community building via festivals that involve students, parents and teachers as well as field trip opportunities to expand learning into the community and natural environment. [Costs reported in Action 2:1]		No
3.6	Access to CCSS	Live Oak provides equitable access to State academic content areas.		No
3.8	Extended Learning Opportunity Program (ELOP)	Participate by offering TK-6 grade unduplicated students a 9 hour long school day and 30 days of intersession. Costs are included in Goal 5 - After School Program		No
3.9	Universal Transitional Kindergarten (UTK)	Adjust the student enrollment birth range per State requirements yearly. Costs are included in Goal 5		No
3.10	Goal 3: Overall	Costs for Goal 3 are included in Total Faculty and M&A Salaries and Benefits Costs - See Goal 5		No

Goal Analysis [2021-22]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Actions were implemented as intended.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Salaries and Benefits costs are expected to increase 4-8% in 22-23

An explanation of how effective the specific actions were in making progress toward the goal.

In the year of the pandemic, approximately 77% of parents surveyed agreed or strongly agreed that we are meeting this goal.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

We are not making any changes to the planned goal for the coming year. However, we are adding two action steps: Extended Learning Opportunity Plan Planning (ELOP), and Universal Transition Kindergarten (UTK) Planning. The purpose of the ELOP Planning action step is to develop a plan to work with our current AfterCare program and/or one of our community partners (Boys and Girls Club) to offer opportunities to meet ELOP program requirements. ELOP offers after school and intersessional learning opportunities to students in grades TK through 6, which will be free of charge for unduplicated students. Unduplicated students currently make up 19% of our student population. The purpose of the UTK Planning action step is to develop a plan to meet the new state requirements to gradually make Transitional Kindergarten available to every four-year-old, with the goal of having all four-year-olds eligible in the 2024-25 school year. Also, we will continue to use STAR as our benchmark assessments with at least 90% participation on all three tests (BOY, MOY, EOY) in both ELA and Math.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Goals and Actions

Goal

Goal #	Description
4	<p>Pupil Engagement and School Climate</p> <p>4.1. School Attendance rates of higher than 93%</p> <p>4.2. Low levels of chronic absenteeism</p> <p>4.3. No middle school dropouts</p> <p>4.4. Suspension rates of less than 3%; and</p> <p>4.5. Expulsion rates of less than 1%.</p>

An explanation of why the LEA has developed this goal.

State Priorities: 5 – Pupil Engagement and 6 – School Climate

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Daily attendance recorded in our Student Information System	Attendance rates 93% or higher	Overall attendance rate of 95.5% with no MS dropouts	Not Applicable	Not Applicable	Not Applicable
Dashboard Reporting	Most recent Dashboard Data indicates 8% of chronically absent students. suspension rate of 1.6%	Dashboard Data available in 22/23	Not Applicable	Not Applicable	Not Applicable
Dashboard Reporting	Most recent Dashboard Data indicates suspension rate of 1.6%	Dashboard Data available in 22/23	Not Applicable	Not Applicable	Not Applicable

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Expulsion Profile report from Student Information System	Expulsion rate of less than 1%	Zero expulsions	Not Applicable	Not Applicable	Not Applicable

Actions

Action #	Title	Description	Total Funds	Contributing
4.1	School culture and Attendance	Live Oak will provide a safe, nurturing and positive learning environment and encourage consistent school attendance to students and parents.		No
4.2	Attendance monitoring	Live Oak communicates daily with parents/guardians students who are absent and works with parents of chronically absent parents to improve attendance.		No
4.3	Teacher Collaboration	Our middle school teachers will have time to discuss and collaborate on best practices with middle school students on a weekly basis.		No
4.4	Survey of Stakeholders	Live Oak administers feedback surveys to students, staff, and families annually on school climate.		No
4.5	Goal 4: Overall	Costs for Goal 4 are included in Total Faculty, Staff, and M&A Salaries and Benefits Costs		No

Goal Analysis [2021-22]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Actions were implemented as intended.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Salaries and Benefits costs are expected to increase 4-8% in 22-23

An explanation of how effective the specific actions were in making progress toward the goal.

In the year of the pandemic, approximately 83% of parents surveyed agreed or strongly agreed that we are meeting this goal. Our student survey results show 88% of 7th and 8th grade students reported that they "agreed" or "strongly agreed" on questions regarding feeling physically safe at school and 70% with 25% neutral of those same students say they feel emotionally safe at school.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

We will continue to develop our school culture including Restorative Justice (RJ) practices in order to develop progress towards seeing the behaviors we want to see at school. Also, RJ practices and approaches give us a tool to reduce student to student conflict. We expect these efforts to continue in helping meet our goals listed above. We will continue to offer Independent Study as a way to mitigate unexcused absences.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Goals and Actions

Goal

Goal #	Description
5	<p>Local Goals:</p> <p>5.1. Provide high quality Public Waldorf programs, faculty, staff, and administration.</p> <p>5.2. Ensure the long-term sustainability and financial stability of the school.</p> <p>5.3. Continue to provide a robust academic student support / Response-to-Intervention (RTI) program as part of an effective overall Multi-tiered System of Support (MTSS).</p> <p>5.4. Continue to develop Special Education expertise, resources, and overall program.</p> <p>5.5. Develop a robust social emotional learning support program.</p>

An explanation of why the LEA has developed this goal.

This is a schoolwide goal, which is applicable to the same extent to all subgroups at LOCS.

English Language Learners: .State Priorities: 1, 3, 4, 6, 8

Local Priorities

Local Priority #5.1: There is a continued strong community demand for a high quality, Public Waldorf school in the school district and geographical region.

Local Priority #5.2: In addition to other measures of success noted elsewhere in this LCAP (e.g. high community demand for Public Waldorf education, and long-term facilities procurement/ security), other factors of success include: (1) Strong school leadership and governance; (2) Prudent fiscal management; (3) Building relationships with authorizing district; (4) Participate with charter advocacy and support organizations; and (5) Accountability and compliance with applicable regulations.

Local Priority #5.3: To provide additional academic support to students in order to increase student success and pupil achievement within the general education environment. This goal also specifically addresses increasing and improving services to unduplicated pupils and specific subgroups (See “Demonstration of Increased or Improved Services for Unduplicated Pupils” section below). Implement an integrated Multi-Tiered System of Support as a way to help serve the whole child and systematically support all students. Continue to designate and integrate instruction in English language development including English Language Proficiency Assessment of California progress toward language proficiency.

Local Priority #5.4: Ensure students with disabilities are included in all offerings of school education models by using the IEP process to customize educational opportunities and support when necessary. Provide mandated special education services and programs. Continue with providing supports and instruction for small groups of students who need additional instructional and/or social and emotional attention.

Local Priority #5.5: To provide students with dedicated onsite mental health support services to help with ongoing mental health impacts.

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
5.1 High enrollment	Enrollment: 284 students (P-2)	We finished the year with 261 (P-2)	Not Applicable	Not Applicable	Not Applicable
5.1 Waiting lists for most classes indicates strong demand	There are wait lists for every class.	We have waitlists for half of our classes.	Not Applicable	Not Applicable	Not Applicable
5.1 Stakeholder feedback shows Waldorf one of strongest factors in families choosing Live Oak.	Stakeholder feedback shows Waldorf one of strongest factors in families choosing Live Oak.	Stakeholder feedback shows Waldorf one of strongest factors in families choosing Live Oak.	Not Applicable	Not Applicable	Not Applicable
5.2 Board retention and recruitment	Board members are asked to commit to at least a 2-year term	Board members are asked to commit to at least a 2-year term	Not Applicable	Not Applicable	Not Applicable
5.2 Positive feedback from sponsoring district	LOCS has a positive working relationship with PCS.	LOCS has a positive working relationship with PCS. E.g., Maintaining and adding to our meal MOU.	Not Applicable	Not Applicable	Not Applicable
5.2 Positive Annual Audit results	LOCS received positive audit results.	LOCS received positive audit results.	Not Applicable	Not Applicable	Not Applicable

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
	No audit exceptions were noted and no corrective actions were required.	No audit exceptions were noted and no corrective actions were required.			
5.3 Metrics covered under Goal 3	Metrics covered under Goal 3	Metrics covered under Goal 3	Not Applicable	Not Applicable	Not Applicable
5.4 Goals met or progress made on all IEP goals	LOCS has made progress on all IEP goals.	LOCS has made progress on all IEP goals.	Not Applicable	Not Applicable	Not Applicable
5.4 All IEP services delivered	All IEP services delivered	All IEP services delivered.	Not Applicable	Not Applicable	Not Applicable

Actions

Action #	Title	Description	Total Funds	Contributing
5.1	Core programming	Live Oak delivers a quality core Public Waldorf educational program along with a multi-tiered system of support, enhanced Waldorf educational programs, school operations and support functions, and effective school management and administration. [Core Waldorf Faculty & Aides Salary and Benefits Costs Obj 1-3]	\$1,203,951.00	No
5.2	Faculty and staff	Live Oak continues to offer a competitive faculty and staff salaries and benefits, recruit and retain experienced, highly qualified and high quality teachers and staff.		No
5.3	Professional Development	Live Oak provides opportunities for professional development and training, including Waldorf academic and professional conferences. [Obj 5200]	\$17,600.00	No

Action #	Title	Description	Total Funds	Contributing
5.4	On site faculty development	Live Oak uses collaborative approach model within the loop groups to develop content and curriculum, best practices, and data analysis.		No
5.5	Extra duties	Live Oak provides stipends for school leadership; and other vital functions outside of normal duties [Stipend Costs included in other actions under this goal]		No
5.6	Authorizer relationship	5.2.1. Live Oak develops positive and collaborative relationship with sponsoring district and has a BOD representative to attend and/or report on PCS board meetings. Provide PCS audits/reports in a timely manner. [Obj 5800-DIST Oversight Fees]	\$25,668.00	No
5.7	Outside organizations	5.2.2. Live Oak continues membership and participation in leading charter school advocacy and support organizations (AFPWE and CSDC). [Obj 5300]	\$3,500.00	No
5.8	Board of Directors development	5.2.3 Live Oak continues strong governance tradition and continue board development and recruitment.		No
5.9	Fiscal responsibility	5.2.4 Live Oak continues strong history of prudent fiscal management and look at new business services consortium model opportunities to leverage and share financial resources more effectively. [Costs included in Total M&A Salary & Benefits Costs]		No
5.10	Budget filings and audits	5.2.5 Live Oak conducts Annual Audit and prepare filing of IRS Form 990 and CalFTB Form 199 (obj 5821). The Forms 990 and 199 will be prepared by business services consortium staff.	\$12,500.00	No

Action #	Title	Description	Total Funds	Contributing
5.11	Response to Intervention (RTI)	5.3.1. Live Oak further develops the MTSS program [Academic Support Services, Social Emotional Support Services - LCFF Supplemental Only]	\$273,745.00	Yes
5.12	Benchmark Assessments	5.3.2 Live Oak identifies specific options for new grade level benchmark assessments of ELA and Math to determine student RTI need. [Costs included in 5:11]		Yes
5.13	Medical screening	5.3.3 Live Oak conducts Hearing and Vision screening tests as needed.		No
5.14	Special Education	5.4.1. Total Special Education budget for 2021/22 [Net/Excess Cost billed/provided by District personnel Obj 7141]	\$251,335.00	No
5.15	Title I, AB86, ESSER III - Student Services and Expanded Learning Opportunity Grant	Title I, ESSER III, and AB86-ELO Grant - Student Services Costs [Faculty Salaries and Benefits Cost; Rsc 3010, 3213-4, 7425-6]	\$16,475.00	Yes
5.16	Enhanced/Expanded Curriculum	Offer Enhanced / Expanded Curriculum including targeted Math curriculum, music, practical arts, and movement/games programming	\$379,796.00	
5.17	Management and Administration (M&A)	Provide professional and management services to oversee and administer school programs referenced in all other Goals	\$688,038.00	No
5.18	School Nutrition Program	Partner with our school district to offer a healthy meals program to school students [Sal&Ben + Mgmt Food 4710, 5800]	\$29,477.00	No

Action #	Title	Description	Total Funds	Contributing
5.19	After School Program / ELOP /Other Programs	Offer an After School Care program for school families/students [Mgmt CARE Sal&Ben; 4390 CARE, 5800 CARE] and integrate this with the new ELOP program	\$155,698.00	No
5.20	School Counseling	Provide access to school counselors at least three days a week.	\$27,000.00	No

Goal Analysis [2021-22]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Goal 5.1. Provide high quality Public Waldorf programs, faculty, staff, and administration. This goal was developed to provide ongoing access to public Waldorf education. There is a continued strong community demand for a high quality, Public Waldorf school in the school district and geographical region. We fully met this goal.

Goal 5.2. Ensure the long-term sustainability and financial stability of the school. This goal was developed to provide ongoing viability to operate a public charter school. In addition to other measures of success noted elsewhere in this LCAP (e.g. high community demand for Public Waldorf education, and long-term facilities procurement/ security), other factors of success include: (1) Strong school leadership and governance; (2) Prudent fiscal management; (3) Building relationships with authorizing district; (4) Participate with charter advocacy and support organizations; and (5) Accountability and compliance with applicable regulations. We made efforts and gains with each of the aforementioned five points. We fully met this goal.

Goal 5.3. Continue to provide a robust academic student support / Response-to-Intervention (RTI) program as part of an effective overall Multi-tiered System of Support (MTSS) including students with disabilities. This goal was developed to provide additional academic support to students in order to increase student success and pupil achievement within the general education environment. This goal also specifically addresses increasing and improving services to unduplicated pupils and specific subgroups (See “Demonstration of Increased or Improved Services for Unduplicated Pupils” section below). Implement an integrated Multi-Tiered System of Support as a way to help serve the whole child and systematically support all students. We fully met this goal.

Goal 5.4. Continue to develop Special Education expertise, resources, and overall program. This goal was developed to provide mandated special education services and programs. We fully met this goal.

Goal 5.5: To provide students with dedicated onsite mental health support services to help with ongoing mental health impacts. This goal was developed to provide students, including students with disabilities, access to an adult with a background in and study of mental health. We fully met this goal. (new for 21-22)

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Salaries and Benefits are expected to increase 4-8% in 22-23; Additional services/costs are being added as part of the ELOP program and expanded Universal Meal Program; with the expected end of Covid Relief /Learning Loss One-Time funding more RTI services will be funded from General Ed / LCFF funds then in 21-22. [Note should additional one-time funds become available they will supplant this funding.] Special Education costs continue to rise and more services will need to be funded from the General Ed budget.

An explanation of how effective the specific actions were in making progress toward the goal.

In the year of the pandemic, approximately 33% of parents surveyed agreed or strongly agreed that we are meeting this goal. However 52% found this question not applicable.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

We provided an additional service to our student body of having mental health counseling available five days a week. Our school counselors were available to all students, including SWDs, to facilitate social and emotional learning activities. They also worked with teachers to provide social and emotional learning support pull out groups or in the classroom including small groups of students and individual students with identified social and emotional learning needs. We will continue with this service for five days a week during the 22/23 school year as well. We strengthened our MTSS and RTI practices, especially by adding a credentialed teacher and Academic Content Coaches to the program to provide targeted, small group RTI support to identified students. All general education teachers received professional development on MTSS during weekly faculty meetings including presentations on Adverse Childhood Experiences (ACES).

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2022-23]

Projected LCFF Supplemental and/or Concentration Grants	Projected Additional LCFF Concentration Grant (15 percent)
109885	0

Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
4.47%	0.00%	\$0.00	4.47%

The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.

Required Descriptions

For each action being provided to an entire school, or across the entire school district or county office of education (COE), an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

<p>General: Multi-Tiered System of Supports</p> <p>Live Oak Charter School’s Core Values, Mission Statement, and Multi-Tiered System of Support are provided to all students, including SWDs. Students with disabilities often receive extra help through our special education programs, which include academic and counseling support. However, students from low-income families and/or other ethnic subgroup backgrounds may not always qualify for special education help, yet they are not achieving academically at the level of students from other subgroups in the school as demonstrated in our CA Dashboard analysis. Various studies show that students from these backgrounds especially benefit from extra academic support and social-emotional support.</p> <p>Determination of unduplicated students will result in priority of services provided at no cost.</p> <p>Qualified low-Income and/or homeless student actions will include: Personal contact with parents/students to determine if they have special or unmet needs. Coordination with parents/students & schools as necessary for optional learning delivery of assignment materials and provision of necessary school supplies.</p>

Provision of community resource information for parents/students, such as shelter, housing, food, clothing, health, COVID resources, etc. and refer parents/students to appropriate community agencies when educational, health or welfare needs are identified.

Priority enrollment in our AfterCare program and summer session offerings.

Coordination and communication with shelters to engage students and families.

Coordination and communication with homeless agencies to make them aware of Live Oak Charter School homeless needs.

Coordination with County LEA Homeless Liaisons to provide continuity of educational services as students transfer.

Supports specific to Foster Youth will include:

Periodic check-ins with students and foster parents via phone, zoom, and email as needed.

Monitoring of attendance/engagement and communication with teachers and administrators when needed.

Referrals to both district and community agencies for additional support/resources as needed.

Collaboration with Student Hearing and Placement and Special Education agencies so that any new youth entering Live Oak are placed in the appropriate setting in a timely manner.

Supports specific to English Learners will include:

Students will receive both integrated and designated English Language Development (ELD).

For Designated ELD, English Learners will receive regular instruction targeted at their proficiency level and based on the California ELD standards.

The California Department of Education has identified implementation of an effective Multi-Tiered System of Support as instrumental in the academic, behavioral, and social success of all students. In particular, Live Oak Charter's MTSS program is principally directed towards and is effective in meeting the school's goals for its unduplicated pupils in the state and local priority areas addressed by the school. These services are the most effective use of the funds to meet the goals for all students, and in particular our unduplicated pupils. (Please reference the CDE website: <https://www.cde.ca.gov/ci/cr/ri/> for a detailed explanation of MTSS, research literature, and other resources detailing the effectiveness and value of this approach for unduplicated pupils and all students.).

"... MTSS focuses on aligning initiatives and resources within an educational organization to address the needs of all students. It is an integrated, comprehensive framework for local educational agencies (LEA) that aligns academic, behavioral, and social-emotional learning in a fully integrated system of support for the benefit of all students. MTSS offers the potential to create systematic change through intentional integration of services and supports to quickly identify and meet the needs of all students.

California's ... educational system requires a multifaceted approach.... "one coherent system of education" (that) offers an opportunity to build the foundation for educational excellence. ... MTSS affords a full range of academic, behavioral, and social support for all students to achieve." Reference: CDE website: <https://www.cde.ca.gov/ci/cr/ri/>

These articles and policy briefs focus on the effectiveness and benefits of a MTSS:

Research Brief: Multi-tier System of Support (MTSS), (PDF): A brief by Orla Higgins Averill and Claudia Rinaldi on MTSS.

Kansas MTSS. The Integration of MTSS and RtI (PDF) The Kansas Multi-Tier System of Support.

Florida's Multi-tiered System of Support: An overview of Florida's MTSS implementation.

Multi-Tier System of Support: An article in District Administration magazine.

Live Oak Charter School's MTSS System consists of two components:

- 1) Response to Intervention (RTI) [academic intervention]
- 2) Social Emotional Learning (SEL): This of (a) Social Inclusion, and (b) Restorative Discipline

Program / Action #1: RTI / Academic Student Support: (See Goal 5 above)

Various studies have shown that when underachieving students receive more academic support, care, and intervention during various stages of their education, there will tend to be improved long-term student outcomes. In particular students in the low income and minority subgroups benefit from this program, because parents may not be able to provide the extra support after school. Extra academic support at all age levels is important for our unduplicated pupils and other sub groups. We are implementing a research-based program called Response to Intervention (RTI), which is coordinated by our Executive Director in collaboration with the school's RTI Coordinator. This program is principally directed towards and is effective in meeting the school's goals for its unduplicated pupils in the state and local priority areas addressed by the school. This initiative broadly addresses State Priorities 4 (Pupil Achievement), 5 (Pupil Engagement) and 8 (Pupil Outcomes). These services are the most effective use of the funds to meet the goals for all students, and in particular our unduplicated pupils. (Please reference the CDE website: <https://www.cde.ca.gov/ci/cr/ri/> for a detailed explanation of MTSS, research literature, and other resources detailing the effectiveness and value of this approach.)

Additional studies which detail this benefit include:

Response to Intervention: Providing Reading Intervention to Low Income and Minority Students, by Emily Graves and Tess McConnell
Education Funding and Low-Income Children: A Review of Current Research (study), by Kevin Carey
Serving Low-Income Students: Applying Research and Intercultural Development Research Association's Quality Schools Action Framework (study) by Kristin Grayson, M.Ed.

In the 21-22 school year, we employed a RTI Coordinator to oversee the RTI academic needs in grades 1-8 and work with our paraprofessionals as needed. RTI will include providing ELA and Math support for selected students.

Program / Action #2: Social and Emotional Student Support: (See Goal 5 above)

The school has trained teachers in the "Social Inclusion" student support program/ system, Restorative Discipline, and social-emotional support for students. We also provide counseling as required and are currently working plans to offer any students who need it, including through our RTI program. See <http://www.socialsustain.com/> for more information about the "Social Inclusion" program. The school's social-emotional learning (SEL) program focuses on social, behavioral, and emotional support and how these impact the students' learning environment and issues that impede learning and growth. Other areas that are addressed by this program are anti-bullying, conflict

resolution, social skills development, intervention and support, and other aspects of student support. There are daily activities undertaken by teachers and staff to support students on an ongoing basis using skills learned in the program. In addition, faculty and staff collaborate weekly during faculty meetings and discuss best practices including individual cases and planning support activities. The teachers discuss specific intervention activities with colleagues and/or paraprofessionals on an average of one to two hours per week. The school has adopted Second Step, Restorative Justice, and Positive Behavior Intervention and Supports as programmatic tools to help teach and practice.

Social, emotional, behavioral, and discipline related issues can make a huge impact on student success, therefore it is one of our priorities. This initiative, while of benefit to all students, is principally directed towards and is effective in meeting the school's goals for its unduplicated pupils in the state and local priority areas addressed by the school. This initiative broadly addresses almost six of the eight State Priorities (1,3,4,5,6, and 8) such as: enhancing the conditions of learning; increasing pupil achievement; advancing other pupil outcomes such as character development, service, and citizenship; increasing pupil engagement and parental involvement; as well as enhancing the overall school climate.

These services are the most effective and best use of the funds to meet the goals for all students, and in particular our unduplicated pupils. (Please reference the CDE website: <https://www.cde.ca.gov/ci/cr/ri/> for a detailed explanation of MTSS, research literature, and other resources detailing the effectiveness and value of this approach.) Research studies, as well as the broad array of state initiatives directed at improving school climate and supporting the emotional, social, and behavioral development of students, have shown that Social and Emotional Support programs are a significant factor in the overall success of all students and particularly low income and special education students. Studies supporting why low-income students benefit significantly from the support of social and emotional programs in schools include: Teaching with Poverty in Mind (book), by Eric Jensen; The Role of Supportive School Environments in Promoting Academic Success (study), by Eric Schaps, Ph.D.; The Effects of Teacher-Student Relationships: Social and Academic Outcomes of Low-Income Middle and High School Students (study), by Emily Gallagher .

The findings that social and emotional support programs are of extremely high benefit to low-income students and an effective use of supplemental funds are very well supported. The California Department of Education recognizes the high level of importance of social and emotional learning and support and is participating in a multi-state collaborative in developing standards and researching best practices. Additionally, the very highly touted California "CORE" districts (<http://coredistricts.org/>) highlight the central role that Social-Emotional learning plays in their overall school quality improvement program touching on many of the 8 state priorities (<http://coredistricts.org/school-quality-improvement-system-waiver/>). In a recent report conducted by Policy Analysis for California Education (PACE) (<http://www.edpolicyinca.org/publications/using-sel-and-cc>) one of the policy indications is: "Policy makers, educators, and the broader public increasingly agree that students' development of social-emotional skills is important for success in academic and life outcomes. Research provides evidence that schools can facilitate the development of these skills, both directly and through the implementation of policies and practices that improve a school's culture and climate and promote positive relationships." In their paper last updated on March 29, 2016 (Social-Emotional & Culture-Climate Domain–Social-Emotional Skills), the CORE Districts state the following:

"Leaders of the CORE districts believe, based on compelling research and their own experience as educators, that social-emotional (SE) competencies like self-management and developing a positive/growth mindset are an important complement to academic preparation in

helping our students succeed in college, career, and life. ... In a review of the mindsets and competencies that promote long-term learning, Professor Carol Dweck and her colleagues report that social-emotional competencies “can matter even more than cognitive factors for students’ academic performance. ... Indeed, there is a growing recognition in education, psychology, and economics of the importance of [social-emotional] factors in achievement both in school and in the labor market (Duckworth & Seligman, 2005; Dweck, 1999; Heckman, Stixrud, & Urzua, 2006; Steele, Spencer, & Aronson, 2002). There has also been a recognition that these factors offer promising levers for raising the achievement of underprivileged children and, ultimately, closing achievement gaps based on race and income (Heckman et al., 2006). [This research] shows that educational interventions and initiatives that target these...factors can have transformative effects on students’ experience and achievement in school, improving core academic outcomes such as GPA and test scores months and even years later.”

During 2018-2020, the whole faculty was trained on restorative discipline issues by Restorative Resources. We continue to be aware of and discuss with one another and/or during faculty meetings updates on progress in restorative situations. The school is dedicated to continuing the restorative discipline system. This initiative, while of benefit to all students, is principally directed towards and is effective in meeting the school’s goals for its unduplicated pupils in the state and local priority areas addressed by the school. We also feel that it will continue to reduce the number of suspensions.

“Restorative Discipline is a whole-school relational approach to building a positive school climate and addressing student behavior that fosters belonging over exclusion, social engagement over control, and meaningful accountability over punishment. Its practices replace fear, uncertainty, and punishment as motivators with belonging, connectedness and the willingness to change because people matter to each other.” (The Institute for Restorative Justice and Restorative Dialogue at the University of Texas at Austin, 2018) <https://irjrd.org/restorative-discipline-in-schools/>

School restorative practices vary widely, but most such practices bring together those who were harmed and those who did the harm (along with adults representing the interests of the school community) for the purpose of mutual understanding, self-responsibility, community accountability, repairing of harm (including relationships) and reintegration of the person causing the harm back into the school community, as a substitute to harsh punishments, including suspensions (Lyubansky 2016).

For the 21-22 school year, we were able to attend Professional Development sponsored by our local County Office of Education specifically on MTSS. One of the outcomes is that as part of our ongoing development in Restorative Practices, we will implement Positive Behavior Interventions and Supports (PBIS) specifically for school rules and behavioral expectations. Incorporating PBIS into the fabric of our school is under the behavioral side of the MTSS model. Additionally, there are no associated costs to implement PBIS. We anticipate the outcome to be able to use consistent language with expectations in common areas.

A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.

See Action 5.11. above for RTI/SocEm Support Services costs included in the LCAP. Total Planned Expenditure = \$273,745. Exceeds increased apportionment amount and corresponds to an Increase/Improve % of 11.1%. If additional one-time funds become available we hope to supplant some of these costs and bring the Supplemental LCFF spending into the required range of \$109,885 / 4.47%.

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

Not Applicable

Staff-to-student ratios by type of school and concentration of unduplicated students	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students		
Staff-to-student ratio of certificated staff providing direct services to students		

2022-23 Total Expenditures Table

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	\$2,266,497.00	\$527,387.00	\$391,674.00	\$16,475.00	\$3,202,033.00	\$2,788,431.00	\$413,602.00

Goal	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
1	1.1	Teacher Credentialing	All					
1	1.2	Teacher credential review/audits	All					
1	1.3	Teacher credential monitoring	All					
1	1.4	Classroom materials and equipment	All	\$23,261.00	\$16,689.00			\$39,950.00
1	1.5	Custodial service and Maintaining campus	All	\$43,300.00				\$43,300.00
1	1.6	National School Breakfast and Lunch Program	All					
2	2.1	Community building/volunteering	All	\$34,000.00				\$34,000.00
2	2.2	Community building/volunteering	All					
2	2.3	Parent engagement	All					
2	2.4	Stakeholder Surveys	All					
2	2.5	Communication	All					
2	2.6	Continued engagement and development	All					
2	2.7	Goal 2: Overall	All					
3	3.1	Accessible CCSS standards	All					
3	3.2	Benchmark Assessments	All					
3	3.3	Integration of Waldorf and CCSS	All					

Goal	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
3	3.4	Positive Student Culture	All					
3	3.5	Community Building	All					
3	3.6	Access to CCSS	All					
3	3.8	Extended Learning Opportunity Program (ELOP)	All					
3	3.9	Universal Transitional Kindergarten (UTK)	All					
3	3.10	Goal 3: Overall	All Students with Disabilities					
4	4.1	School culture and Attendance	All					
4	4.2	Attendance monitoring	All					
4	4.3	Teacher Collaboration	All					
4	4.4	Survey of Stakeholders	All					
4	4.5	Goal 4: Overall	All					
5	5.1	Core programming	All Students with Disabilities	\$783,546.00	\$420,405.00			\$1,203,951.00
5	5.2	Faculty and staff	All					
5	5.3	Professional Development	All	\$17,600.00				\$17,600.00
5	5.4	On site faculty development	All					
5	5.5	Extra duties	All					
5	5.6	Authorizer relationship	All	\$25,668.00				\$25,668.00
5	5.7	Outside organizations	All	\$3,500.00				\$3,500.00
5	5.8	Board of Directors development	All					
5	5.9	Fiscal responsibility	All					
5	5.10	Budget filings and audits	All	\$12,500.00				\$12,500.00

Goal	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
5	5.11	Response to Intervention (RTI)	English Learners Foster Youth Low Income	\$273,745.00				\$273,745.00
5	5.12	Benchmark Assessments	English Learners Foster Youth Low Income					
5	5.13	Medical screening	All					
5	5.14	Special Education	Students with Disabilities	\$251,335.00				\$251,335.00
5	5.15	Title I, AB86, ESSER III - Student Services and Expanded Learning Opportunity Grant	English Learners Foster Youth Low Income				\$16,475.00	\$16,475.00
5	5.16	Enhanced/Expanded Curriculum		\$179,796.00		\$200,000.00		\$379,796.00
5	5.17	Management and Administration (M&A)	All	\$561,769.00		\$126,269.00		\$688,038.00
5	5.18	School Nutrition Program	All	\$29,477.00				\$29,477.00
5	5.19	After School Program / ELOP /Other Programs	All		\$90,293.00	\$65,405.00		\$155,698.00
5	5.20	School Counseling	All	\$27,000.00				\$27,000.00

2022-23 Contributing Actions Table

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)	Totals by Type	Total LCFF Funds
2456953	109885	4.47%	0.00%	4.47%	\$273,745.00	0.00%	11.14 %	Total:	\$273,745.00
								LEA-wide Total:	\$0.00
								Limited Total:	\$0.00
								Schoolwide Total:	\$273,745.00

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
5	5.11	Response to Intervention (RTI)	Yes	Schoolwide	English Learners Foster Youth Low Income	All Schools	\$273,745.00	
5	5.12	Benchmark Assessments	Yes	Schoolwide	English Learners Foster Youth Low Income	All Schools		
5	5.15	Title I, AB86, ESSER III - Student Services and Expanded Learning Opportunity Grant	Yes	Schoolwide	English Learners Foster Youth Low Income	All Schools		

2021-22 Annual Update Table

Totals	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Expenditures (Total Funds)
Totals	\$2,760,774.00	\$2,845,614.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	1.1	Teacher Credentialing	No		
1	1.2	Teacher credential review/audits	No		
1	1.3	Teacher credential monitoring	No		
1	1.4	Classroom materials and equipment	No	\$28,650.00	32960
1	1.5	Custodial service and Maintaining campus	No	\$29,500.00	88500
2	2.1	Community building/volunteering	No	\$33,500.00	33200
2	2.2	Community building/volunteering	No		
2	2.3	Parent engagement	No		
2	2.4	Stakeholder Surveys	No		
2	2.5	Communication	No		

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
2	2.6	Continued engagement and development	No		
2	2.7	Goal 2: Overall			
3	3.1	Accessible CCSS standards	No		
3	3.2	Benchmark Assessments	No		
3	3.3	Integration of Waldorf and CCSS	No		
3	3.4	Positive Student Culture	No		
3	3.5	Community Building	No		
3	3.6	Access to CCSS	No		
3	3.7	Goal 3: Overall	No		
4	4.1	School culture and Attendance	No		
4	4.2	Attendance monitoring	No		
4	4.3	Teacher Collaboration	No		
4	4.4	Survey of Stakeholders	No		

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
4	4.5	Goal 4: Overall	No		
5	5.1	Core programming	No	\$1,120,610.00	1110743
5	5.2	Faculty and staff	No		
5	5.3	Professional Development	No	\$8,500.00	9075
5	5.4	On site faculty development	No		
5	5.5	Extra duties	No		
5	5.6	Authorizer relationship	No	\$24,420.00	22682
5	5.7	Outside organizations	No	\$3,500.00	3500
5	5.8	Board of Directors development	No		
5	5.9	Fiscal responsibility	No		
5	5.10	Budget filings and audits	No	\$12,500.00	12900
5	5.11	Response to Intervention (RTI)	Yes	\$103,786.00	111485
5	5.12	Benchmark Assessments	Yes		

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
5	5.13	Medical screening	No		
5	5.14	Special Education	No	\$140,000.00	185000
5	5.15	Title I, AB86, ESSER III - Student Services and Expanded Learning Opportunity Grant	Yes	\$172,594.00	147059
5	5.16	Enhanced/Expanded Curriculum		\$344,065.00	330681
5	5.17	Management and Administration (M&A)	No	\$560,296.00	583773
5	5.18	School Nutrition Program	No	\$19,284.00	22569
5	5.19	After Care Program / Other Program	No	\$143,569.00	124487
5	5.20	School Counseling	No	16000	27000

2021-22 Contributing Actions Annual Update Table

6. Estimated LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Expenditures for Contributing Actions (Subtract 7 from 4)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Percentage of Improved Services (%)	Difference Between Planned and Estimated Percentage of Improved Services (Subtract 5 from 8)
96635	\$103,786.00	\$111,485.00	(\$7,699.00)	4.33%	5.13%	1.00%

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributing to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services (Input Percentage)
5	5.11	Response to Intervention (RTI)	Yes	\$103,786.00	111485	4.33	5.13
5	5.12	Benchmark Assessments	Yes				
5	5.15	Title I, AB86, ESSER III - Student Services and Expanded Learning Opportunity Grant	Yes				

2021-22 LCFF Carryover Table

9. Estimated Actual LCFF Base Grant (Input Dollar Amount)	6. Estimated Actual LCFF Supplemental and/or Concentration Grants	LCFF Carryover — Percentage (Percentage from Prior Year)	10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	8. Total Estimated Actual Percentage of Improved Services (%)	11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9)	13. LCFF Carryover — Percentage (12 divided by 9)
2171560	96635	0	4.45%	\$111,485.00	5.13%	10.26%	\$0.00	0.00%

Instructions

[Plan Summary](#)

[Engaging Educational Partners](#)

[Goals and Actions](#)

[Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students](#)

For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at lcff@cde.ca.gov.

Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning (California *Education Code* [EC] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.
- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (EC Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.
- **Accountability and Compliance:** The LCAP serves an important accountability function because aspects of the LCAP template require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:
 - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (EC Section 52064[b][4-6]).
 - Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (EC sections 52064[b][1] and [2]).
 - Annually reviewing and updating the LCAP to reflect progress toward the goals (EC Section 52064[b][7]).

The LCAP template, like each LEA’s final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which should: (a) reflect comprehensive strategic planning (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in *EC* sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity’s budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2021–22, 2022–23, and 2023–24 school years reflects statutory changes made through Assembly Bill 1840 (Committee on Budget), Chapter 243, Statutes of 2018. These statutory changes enhance transparency regarding expenditures on actions included in the LCAP, including actions that contribute to meeting the requirement to increase or improve services for foster youth, English learners, and low-income students, and to streamline the information presented within the LCAP to make adopted LCAPs more accessible for educational partners and the public.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA’s diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

Given present performance across the state priorities and on indicators in the California School Dashboard (Dashboard), how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions that the LEA believes, based on input gathered from educational partners, research, and experience, will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP, but may include information about effective practices when developing the LCAP and completing the LCAP itself. Additionally, information is included at the beginning of each section emphasizing the purpose that each section serves.

Plan Summary

Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to provide a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included in the subsequent sections of the LCAP.

Requirements and Instructions

General Information – Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA. For example, information about an LEA in terms of geography, enrollment, or employment, the number and size of specific schools, recent community challenges, and other such information as an LEA wishes to include can enable a reader to more fully understand an LEA's LCAP.

Reflections: Successes – Based on a review of performance on the state indicators and local performance indicators included in the Dashboard, progress toward LCAP goals, local self-assessment tools, input from educational partners, and any other information, what progress is the LEA most proud of and how does the LEA plan to maintain or build upon that success? This may include identifying specific examples of how past increases or improvements in services for foster youth, English learners, and low-income students have led to improved performance for these students.

Reflections: Identified Need – Referring to the Dashboard, identify: (a) any state indicator for which overall performance was in the “Red” or “Orange” performance category or any local indicator where the LEA received a “Not Met” or “Not Met for Two or More Years” rating AND (b) any state indicator for which performance for any student group was two or more performance levels below the “all student” performance. What steps is the LEA planning to take to address these areas of low performance and performance gaps? An LEA that is required to include a goal to address one or more consistently low-performing student groups or low-performing schools must identify that it is required to include this goal and must also identify the applicable student group(s) and/or school(s). Other needs may be identified using locally collected data including data collected to inform the self-reflection tools and reporting local indicators on the Dashboard.

LCAP Highlights – Identify and briefly summarize the key features of this year's LCAP.

Comprehensive Support and Improvement – An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

- **Schools Identified:** Identify the schools within the LEA that have been identified for CSI.
- **Support for Identified Schools:** Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.
- **Monitoring and Evaluating Effectiveness:** Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

Engaging Educational Partners

Purpose

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, accountability, and improvement across the state priorities and locally identified priorities (*EC* Section 52064[e][1]). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

Statute and regulations specify the educational partners that school districts and COEs must consult when developing the LCAP: teachers, principals, administrators, other school personnel, local bargaining units of the LEA, parents, and students. Before adopting the LCAP, school districts and COEs must share it with the Parent Advisory Committee and, if applicable, to its English Learner Parent Advisory Committee. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

Statute requires charter schools to consult with teachers, principals, administrators, other school personnel, parents, and students in developing the LCAP. The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals and actions.

Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the following web page of the CDE's website: <https://www.cde.ca.gov/re/lc/>.

Requirements and Instructions

Below is an excerpt from the 2018–19 *Guide for Annual Audits of K–12 Local Education Agencies and State Compliance Reporting*, which is provided to highlight the legal requirements for engagement of educational partners in the LCAP development process:

Local Control and Accountability Plan:

For county offices of education and school districts only, verify the LEA:

- a) Presented the local control and accountability plan to the parent advisory committee in accordance with Education Code section 52062(a)(1) or 52068(a)(1), as appropriate.
- b) If applicable, presented the local control and accountability plan to the English learner parent advisory committee, in accordance with Education Code section 52062(a)(2) or 52068(a)(2), as appropriate.

- c) Notified members of the public of the opportunity to submit comments regarding specific actions and expenditures proposed to be included in the local control and accountability plan in accordance with Education Code section 52062(a)(3) or 52068(a)(3), as appropriate.
- d) Held at least one public hearing in accordance with Education Code section 52062(b)(1) or 52068(b)(1), as appropriate.
- e) Adopted the local control and accountability plan in a public meeting in accordance with Education Code section 52062(b)(2) or 52068(b)(2), as appropriate.

Prompt 1: “A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP.”

Describe the engagement process used by the LEA to involve educational partners in the development of the LCAP, including, at a minimum, describing how the LEA met its obligation to consult with all statutorily required educational partners as applicable to the type of LEA. A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA’s philosophical approach to engaging its educational partners.

Prompt 2: “A summary of the feedback provided by specific educational partners.”

Describe and summarize the feedback provided by specific educational partners. A sufficient response to this prompt will indicate ideas, trends, or inputs that emerged from an analysis of the feedback received from educational partners.

Prompt 3: “A description of the aspects of the LCAP that were influenced by specific input from educational partners.”

A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. The response must describe aspects of the LCAP that were influenced by or developed in response to the educational partner feedback described in response to Prompt 2. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP. For the purposes of this prompt, “aspects” of an LCAP that may have been influenced by educational partner input can include, but are not necessarily limited to:

- Inclusion of a goal or decision to pursue a Focus Goal (as described below)
- Inclusion of metrics other than the statutorily required metrics
- Determination of the desired outcome on one or more metrics
- Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
- Inclusion of action(s) or a group of actions
- Elimination of action(s) or group of actions
- Changes to the level of proposed expenditures for one or more actions

- Inclusion of action(s) as contributing to increased or improved services for unduplicated services
- Determination of effectiveness of the specific actions to achieve the goal
- Determination of material differences in expenditures
- Determination of changes made to a goal for the ensuing LCAP year based on the annual update process
- Determination of challenges or successes in the implementation of actions

Goals and Actions

Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal should be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs should consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard in determining whether and how to prioritize its goals within the LCAP.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- **Focus Goal:** A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.
- **Broad Goal:** A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.
- **Maintenance of Progress Goal:** A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

At a minimum, the LCAP must address all LCFF priorities and associated metrics.

Focus Goal(s)

Goal Description: The description provided for a Focus Goal must be specific, measurable, and time bound. An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach. The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

Explanation of why the LEA has developed this goal: Explain why the LEA has chosen to prioritize this goal. An explanation must be based on Dashboard data or other locally collected data. LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners. LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

Broad Goal

Goal Description: Describe what the LEA plans to achieve through the actions included in the goal. The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal. The goal description organizes the actions and expected outcomes in a cohesive and consistent manner. A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

Explanation of why the LEA has developed this goal: Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

Maintenance of Progress Goal

Goal Description: Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP. Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP. The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

Explanation of why the LEA has developed this goal: Explain how the actions will sustain the progress exemplified by the related metrics.

Required Goals

In general, LEAs have flexibility in determining what goals to include in the LCAP and what those goals will address; however, beginning with the development of the 2022–23 LCAP, LEAs that meet certain criteria are required to include a specific goal in their LCAP.

Consistently low-performing student group(s) criteria: An LEA is eligible for Differentiated Assistance for three or more consecutive years based on the performance of the same student group or groups in the Dashboard. A list of the LEAs required to include a goal in the LCAP based on student group performance, and the student group(s) that lead to identification, may be found on the CDE’s Local Control Funding Formula web page at <https://www.cde.ca.gov/fg/aa/lc/>.

- **Consistently low-performing student group(s) goal requirement:** An LEA meeting the consistently low-performing student group(s) criteria must include a goal in its LCAP focused on improving the performance of the student group or groups that led to the LEA’s eligibility for Differentiated

Assistance. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, this student group or groups. An LEA required to address multiple student groups is not required to have a goal to address each student group; however, each student group must be specifically addressed in the goal. This requirement may not be met by combining this required goal with another goal.

- **Goal Description:** Describe the outcomes the LEA plans to achieve to address the needs of, and improve outcomes for, the student group or groups that led to the LEA's eligibility for Differentiated Assistance.
- **Explanation of why the LEA has developed this goal:** Explain why the LEA is required to develop this goal, including identifying the student group(s) that lead to the LEA being required to develop this goal, how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the student group(s), and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes identified in the goal description.

Low-performing school(s) criteria: The following criteria only applies to a school district or COE with two or more schools; it does not apply to a single-school district. A school district or COE has one or more schools that, for two consecutive years, received the two lowest performance levels on all but one of the state indicators for which the school(s) receive performance levels in the Dashboard and the performance of the "All Students" student group for the LEA is at least one performance level higher in all of those indicators. A list of the LEAs required to include a goal in the LCAP based on school performance, and the school(s) that lead to identification, may be found on the CDE's Local Control Funding Formula web page at <https://www.cde.ca.gov/fg/aa/lc/>.

- **Low-performing school(s) goal requirement:** A school district or COE meeting the low-performing school(s) criteria must include a goal in its LCAP focusing on addressing the disparities in performance between the school(s) and the LEA as a whole. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, the students enrolled at the low-performing school or schools. An LEA required to address multiple schools is not required to have a goal to address each school; however, each school must be specifically addressed in the goal. This requirement may not be met by combining this goal with another goal.
- **Goal Description:** Describe what outcomes the LEA plans to achieve to address the disparities in performance between the students enrolled at the low-performing school(s) and the students enrolled at the LEA as a whole.
- **Explanation of why the LEA has developed this goal:** Explain why the LEA is required to develop this goal, including identifying the schools(s) that lead to the LEA being required to develop this goal; how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the school(s); and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes for students enrolled at the low-performing school or schools identified in the goal description.

Measuring and Reporting Results:

For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes. LEAs are encouraged to identify metrics for specific student groups, as appropriate, including expected outcomes that would reflect narrowing of any existing performance gaps.

Include in the baseline column the most recent data associated with this metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2019 Dashboard for the baseline of a metric only if that data represents the most recent available (e.g., high school graduation rate).

Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS. Because final 2020–21 outcomes on some metrics may not be computable at the time the 2021–24 LCAP is adopted (e.g., graduation rate, suspension rate), the most recent data available may include a point in time calculation taken each year on the same date for comparability purposes.

The baseline data shall remain unchanged throughout the three-year LCAP.

Complete the table as follows:

- **Metric:** Indicate how progress is being measured using a metric.
- **Baseline:** Enter the baseline when completing the LCAP for 2021–22. As described above, the baseline is the most recent data associated with a metric. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 1 Outcome:** When completing the LCAP for 2022–23, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 2 Outcome:** When completing the LCAP for 2023–24, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 3 Outcome:** When completing the LCAP for 2024–25, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above. The 2024–25 LCAP will be the first year in the next three-year cycle. Completing this column will be part of the Annual Update for that year.
- **Desired Outcome for 2023–24:** When completing the first year of the LCAP, enter the desired outcome for the relevant metric the LEA expects to achieve by the end of the 2023–24 LCAP year.

Timeline for completing the “**Measuring and Reporting Results**” part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for Year 3 (2023–24)
Enter information in this box when completing the LCAP for 2021–22 .	Enter information in this box when completing the LCAP for 2021–22 .	Enter information in this box when completing the LCAP for 2022–23 . Leave blank until then.	Enter information in this box when completing the LCAP for 2023–24 . Leave blank until then.	Enter information in this box when completing the LCAP for 2024–25 . Leave blank until then.	Enter information in this box when completing the LCAP for 2021–22 or when adding a new metric.

The metrics may be quantitative or qualitative; but at minimum, an LEA’s LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year as applicable to the type of LEA. To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant self-reflection tool for local indicators within the Dashboard.

Actions: Enter the action number. Provide a short title for the action. This title will also appear in the action tables. Provide a description of the action. Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the summary tables. Indicate whether the action contributes to meeting the increase or improved services requirement as described in the Increased or Improved Services section using a “Y” for Yes or an “N” for No. (**Note:** for each such action offered on an LEA-wide or schoolwide basis, the LEA will need to provide additional information in the Increased or Improved Summary Section to address the requirements in *California Code of Regulations*, Title 5 [5 CCR] Section 15496(b) in the Increased or Improved Services Section of the LCAP).

Actions for English Learners: School districts, COEs, and charter schools that have a numerically significant English learner student subgroup must include specific actions in the LCAP related to, at a minimum, the language acquisition programs, as defined in *EC* Section 306, provided to students and professional development activities specific to English learners.

Actions for Foster Youth: School districts, COEs, and charter schools that have a numerically significant Foster Youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to Foster Youth students.

Goal Analysis:

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective in achieving the goal. Respond to the prompts as instructed.

- Describe the overall implementation of the actions to achieve the articulated goal. Include a discussion of relevant challenges and successes experienced with the implementation process. This must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.
- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.
- Describe the effectiveness of the specific actions to achieve the articulated goal as measured by the LEA. In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal. When responding to this prompt, LEAs may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.
- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA's description in this section must align with the actions included in the Goals and Actions section as contributing.

Requirements and Instructions

Projected LCFF Supplemental and/or Concentration Grants: Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of low income, foster youth, and English learner students.

Projected Additional LCFF Concentration Grant (15 percent): Specify the amount of additional LCFF concentration grant add-on funding, as described in EC Section 42238.02, that the LEA estimates it will receive in the coming year.

Projected Percentage to Increase or Improve Services for the Coming School Year: Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 CCR Section 15496(a)(7).

LCFF Carryover — Percentage: Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

LCFF Carryover — Dollar: Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero (\$0).

Total Percentage to Increase or Improve Services for the Coming School Year: Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEAs percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 CCR Section 15496(a)(7).

Required Descriptions:

For each action being provided to an entire school, or across the entire school district or COE, an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

For each action included in the Goals and Actions section as contributing to the increased or improved services requirement for unduplicated pupils and provided on an LEA-wide or schoolwide basis, the LEA must include an explanation consistent with 5 CCR Section 15496(b). For any such actions continued into the 2021–24 LCAP from the 2017–2020 LCAP, the LEA must determine whether or not the action was effective as expected, and this determination must reflect evidence of outcome data or actual implementation to date.

Principally Directed and Effective: An LEA demonstrates how an action is principally directed towards and effective in meeting the LEA's goals for unduplicated students when the LEA explains how:

- It considers the needs, conditions, or circumstances of its unduplicated pupils;
- The action, or aspect(s) of the action (including, for example, its design, content, methods, or location), is based on these considerations; and
- The action is intended to help achieve an expected measurable outcome of the associated goal.

As such, the response provided in this section may rely on a needs assessment of unduplicated students.

Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient. Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increase or improve services standard because enrolling students is not the same as serving students.

For example, if an LEA determines that low-income students have a significantly lower attendance rate than the attendance rate for all students, it might justify LEA-wide or schoolwide actions to address this area of need in the following way:

After assessing the needs, conditions, and circumstances of our low-income students, we learned that the attendance rate of our low-income students is 7 percent lower than the attendance rate for all students. (Needs, Conditions, Circumstances [Principally Directed])

In order to address this condition of our low-income students, we will develop and implement a new attendance program that is designed to address some of the major causes of absenteeism, including lack of reliable transportation and food, as well as a school climate that does not emphasize the importance of attendance. Goal N, Actions X, Y, and Z provide additional transportation and nutritional resources as well as a districtwide educational campaign on the benefits of high attendance rates. (Contributing Action[s])

These actions are being provided on an LEA-wide basis and we expect/hope that all students with less than a 100 percent attendance rate will benefit. However, because of the significantly lower attendance rate of low-income students, and because the actions meet needs most associated with the chronic stresses and experiences of a socio-economically disadvantaged status, we expect that the attendance rate for our low-income students will increase significantly more than the average attendance rate of all other students. (Measurable Outcomes [Effective In])

COEs and Charter Schools: Describe how actions included as contributing to meeting the increased or improved services requirement on an LEA-wide basis are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above. In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

For School Districts Only:

Actions Provided on an LEA-Wide Basis:

Unduplicated Percentage > 55 percent: For school districts with an unduplicated pupil percentage of 55 percent or more, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above.

Unduplicated Percentage < 55 percent: For school districts with an unduplicated pupil percentage of less than 55 percent, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities. Also describe how the actions **are the most effective use of the funds** to meet these goals for its unduplicated pupils. Provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Actions Provided on a Schoolwide Basis:

School Districts must identify in the description those actions being funded and provided on a schoolwide basis, and include the required description supporting the use of the funds on a schoolwide basis.

For schools with 40 percent or more enrollment of unduplicated pupils: Describe how these actions are principally directed to and effective in meeting its goals for its unduplicated pupils in the state and any local priorities.

For school districts expending funds on a schoolwide basis at a school with less than 40 percent enrollment of unduplicated pupils: Describe how these actions are principally directed to and how the actions are the most effective use of the funds to meet its goals for foster youth, English learners, and low-income students in the state and any local priorities.

A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.

Consistent with the requirements of 5 CCR Section 15496, describe how services provided for unduplicated pupils are increased or improved by at least the percentage calculated as compared to the services provided for all students in the LCAP year. To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are included in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided on an LEA-wide or schoolwide basis or provided on a limited basis to unduplicated students. A limited action is an action that only serves foster youth, English learners, and/or low-income students. This description must address how these action(s) are expected to result in the required proportional increase or improvement in services for unduplicated pupils as compared to the services the LEA provides to all students for the relevant LCAP year.

For any action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage. See the instructions for determining the Planned Percentage of Improved Services for information on calculating the Percentage of Improved Services.

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

An LEA that receives the additional concentration grant add-on described in EC Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.

Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.

An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.

In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of full time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.
- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

Action Tables

Complete the Data Entry Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Data Entry Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. With the exception of the Data Entry Table, the word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)

- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2022–23 LCAP, 2022–23 will be the coming LCAP Year and 2021–22 will be the current LCAP Year.

Data Entry Table

The Data Entry Table may be included in the LCAP as adopted by the local governing board or governing body, but is not required to be included. In the Data Entry Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year:** Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant:** Provide the total amount of LCFF funding the LEA estimates it will receive for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 CCR Section 15496(a)(8).

See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF apportionment calculations.

- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will receive on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 CCR Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.
- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover —

Percentage. This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.

- **Goal #:** Enter the LCAP Goal number for the action.
- **Action #:** Enter the action's number as indicated in the LCAP Goal.
- **Action Title:** Provide a title of the action.
- **Student Group(s):** Indicate the student group or groups who will be the primary beneficiary of the action by entering "All," or by entering a specific student group or groups.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services.
- If "Yes" is entered into the Contributing column, then complete the following columns:
 - **Scope:** The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.
 - **Unduplicated Student Group(s):** Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
 - **Location:** Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate "All Schools." If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter "Specific Schools" or "Specific Grade Spans." Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.
- **Time Span:** Enter "ongoing" if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter "1 Year," or "2 Years," or "6 Months."
- **Total Personnel:** Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel:** This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.

- **LCFF Funds:** Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA's total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
 - **Note:** For an action to contribute towards meeting the increased or improved services requirement it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds:** Enter the total amount of Other State Funds utilized to implement this action, if any.
- **Local Funds:** Enter the total amount of Local Funds utilized to implement this action, if any.
- **Federal Funds:** Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds:** This amount is automatically calculated based on amounts entered in the previous four columns.
- **Planned Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.
 - As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which the LEA estimates would cost \$165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Service for the action.

Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the ‘Contributing to Increased or Improved Services?’ column will need to be checked to ensure that only actions with a “Yes” are displaying. If actions with a “No” are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the “Yes” responses.

Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures:** Enter the total estimated actual expenditures to implement this action, if any.

Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the ‘Contributing to Increased or Improved Services?’ column to ensure that only actions with a “Yes” are displaying. If actions with a “No” are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the “Yes” responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- **Estimated Actual Expenditures for Contributing Actions:** Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.
- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).
 - Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been \$169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of \$169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant:** Provide the total amount of LCFF funding the LEA estimates it will receive for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 CCR Section 15496(a)(8).

- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 CCR Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

Contributing Actions Table

- 4. Total Planned Contributing Expenditures (LCFF Funds)
 - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column
- 5. Total Planned Percentage of Improved Services
 - This percentage is the total of the Planned Percentage of Improved Services column
- Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)
 - This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

Contributing Actions Annual Update Table

Pursuant to *EC* Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- 6. Estimated Actual LCFF Supplemental and Concentration Grants
 - This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- 4. Total Planned Contributing Expenditures (LCFF Funds)
 - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)

- 7. Total Estimated Actual Expenditures for Contributing Actions
 - This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds)
- Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)
 - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4)
- 5. Total Planned Percentage of Improved Services (%)
 - This amount is the total of the Planned Percentage of Improved Services column
- 8. Total Estimated Actual Percentage of Improved Services (%)
 - This amount is the total of the Estimated Actual Percentage of Improved Services column
- Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)
 - This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8)

LCFF Carryover Table

- 10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)
 - This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.
- 11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)
 - This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).
- 12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)
 - If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.

- 13. LCFF Carryover — Percentage (12 divided by 9)
 - This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education
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Local Performance Indicator Self-Reflection

Local Educational Agency (LEA)	Contact Name and Title	Email and Phone
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Introduction

The State Board of Education (SBE) approved standards for the local indicators that support a local educational agency (LEA) in measuring and reporting progress within the appropriate priority area. The approved performance standards require an LEA to:

- Annually measure its progress in meeting the requirements of the specific Local Control Funding Formula (LCFF) priority.
- Report the results as part of a non-consent item at a regularly scheduled public meeting of the local governing board/body in conjunction with the adoption of the Local Control and Accountability Plan (LCAP).
- Report results to the public through the Dashboard utilizing the SBE-adopted self-reflection tools for each local indicator.

This Quick Guide identifies the approved standards and self-reflection tools that an LEA will use to report its progress on the local indicators.

Performance Standards

The performance standards for the local performance indicators are:

Appropriately Assigned Teachers, Access to Curriculum-Aligned Instructional Materials, and Safe, Clean and Functional School Facilities (LCFF Priority 1)

The LEA annually measures its progress in meeting the Williams settlement requirements at 100% at all of its school sites, as applicable, and promptly addresses any complaints or other deficiencies identified throughout the academic

year, as applicable; the LEA then reports the results to its local governing board at a regularly scheduled meeting and to reports to educational partners and the public through the Dashboard.

Implementation of State Academic Standards (LCFF Priority 2)

The LEA annually measures its progress implementing state academic standards; the LEA then reports the results to its local governing board at a regularly scheduled meeting and reports to educational partners and the public through the Dashboard.

Parent and Family Engagement (LCFF Priority 3)

This measure addresses Parent and Family Engagement, including how an LEA builds relationships between school staff and families, builds partnerships for student outcomes and seeks input for decision-making.

LEAs report progress of how they have sought input from parents in decision-making and promoted parent participation in programs to its local governing board or body using the SBE-adopted self-reflection tool for Priority 3 at the same meeting at which the LEA adopts its LCAP, and reports to educational partners and the public through the Dashboard.

School Climate (LCFF Priority 6)

The LEA administers a local climate survey at least every other year that provides a valid measure of perceptions of school safety and connectedness, such as the California Healthy Kids Survey, to students in at least one grade within the grade span(s) that the LEA serves (e.g., K-5, 6-8, 9-12), and reports the results to its local governing board at a regularly scheduled meeting of the local governing board and to educational partners and the public through the Dashboard.

Access to a Broad Course of Study (LCFF Priority 7)

The LEA annually measures its progress in the extent to which students have access to, and are enrolled in, a broad course of study that includes the adopted courses of study specified in the California Education Code (EC) for Grades 1-6 and Grades 7-12, as applicable, including the programs and services developed and provided to unduplicated students and individuals with exceptional needs; the LEA then reports the results to its local governing board at a regularly scheduled meeting and reports to educational partners and the public through the Dashboard.

Coordination of Services for Expelled Students – County Office of Education (COE) Only (LCFF Priority 9)

The county office of education (COE) annually measures its progress in coordinating instruction as required by California EC Section 48926; the COE then reports the results to its local governing board at a regularly scheduled meeting and reports to educational partners and the public through the Dashboard.

Coordination of Services for Foster Youth – COE Only (LCFF Priority 10)

The COE annually measures its progress in coordinating services for foster youth; the COE then reports the results to its local governing board at a regularly scheduled meeting and reports to educational partners and the public through the Dashboard.

Self-Reflection Tools

An LEA uses the self-reflection tools included within the Dashboard to report its progress on the local performance indicator to educational partners and the public.

The self-reflection tools are embedded in the web-based Dashboard system and are also available in Word document format. In addition to using the self-reflection tools to report its progress on the local performance indicators to educational partners and the public, an LEA may use the self-reflection tools as a resource when reporting results to its local governing board. The approved self-reflection tools are provided below.

Appropriately Assigned Teachers, Access to Curriculum-Aligned Instructional Materials, and Safe, Clean and Functional School Facilities (LCFF Priority 1)

LEAs will provide the information below:

- Number/percentage of misassignments of teachers of ELs, total teacher misassignments, and vacant teacher positions
- Number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home
- Number of identified instances where facilities do not meet the "good repair" standard (including deficiencies and extreme deficiencies)

Teachers	Number	Percent
Misassignments of Teachers of English Learners	0	0
Total Teacher Misassignments	0	0
Vacant Teacher Positions	0	0

Access to Instructional Materials	Number	Percent
Students Without Access to Own Copies of Standards-Aligned Instructional Materials for Use at School and at Home	0	0

Facility Conditions	Number
Identified Instances Where Facilities Do Not Meet The "Good Repair" Standard (Including Deficiencies and Extreme Deficiencies)	0

Implementation of State Academic Standards (LCFF Priority 2)

LEAs may provide a narrative summary of their progress in the implementation of state academic standards based on locally selected measures or tools (Option 1). Alternatively, LEAs may complete the optional reflection tool (Option 2).

OPTION 1: Narrative Summary (Limited to 3,000 characters)

In the narrative box provided on the Dashboard, identify the locally selected measures or tools that the LEA is using to track its progress in implementing the state academic standards adopted by the state board and briefly describe why the LEA chose the selected measures or tools.

Additionally, summarize the LEA's progress in implementing the academic standards adopted by the SBE, based on the locally selected measures or tools. The adopted academic standards are:

- English Language Arts (ELA) - Common Core State Standards for ELA
- English Language Development (ELD) (Aligned to Common Core State Standards for ELA)
- Mathematics - Common Core State Standards for Mathematics
- Next Generation Science Standards
- History-Social Science
- Career Technical Education
- Health Education Content Standards
- Physical Education Model Content Standards
- Visual and Performing Arts
- World Language

OPTION 2: Reflection Tool

Recently Adopted Academic Standards and/or Curriculum Frameworks

1. Rate the LEA's progress in providing professional learning for teaching to the recently adopted academic standards and/or curriculum frameworks identified below.

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA				4	
ELD (Aligned to ELA Standards)				4	
Mathematics – Common Core State Standards for Mathematics				4	
Next Generation Science Standards			3		
History-Social Science				4	

2. Rate the LEA's progress in making instructional materials that are aligned to the recently adopted academic standards and/or curriculum frameworks identified below available in all classrooms where the subject is taught.

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA				4	

Academic Standards	1	2	3	4	5
ELD (Aligned to ELA Standards)				4	
Mathematics – Common Core State Standards for Mathematics				4	
Next Generation Science Standards			3		
History-Social Science				4	

3. Rate the LEA's progress in implementing policies or programs to support staff in identifying areas where they can improve in delivering instruction aligned to the recently adopted academic standards and/or curriculum frameworks identified below (e.g., collaborative time, focused classroom walkthroughs, teacher pairing).

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA			3		
ELD (Aligned to ELA Standards)			3		
Mathematics – Common Core State Standards for Mathematics			3		
Next Generation Science Standards			3		
History-Social Science			3		

Other Adopted Academic Standards

4. Rate the LEA's progress implementing each of the following academic standards adopted by the state board for all students.

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
Career Technical Education	1				
Health Education Content Standards			3		
Physical Education Model Content Standards	1				
Visual and Performing Arts			3		
World Language	1				

Support for Teachers and Administrators

5. Rate the LEA's success at engaging in the following activities with teachers and school administrators during the prior school year (including the summer preceding the prior school year).

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
Identifying the professional learning needs of groups of teachers or staff as a whole			3		
Identifying the professional learning needs of individual teachers			3		
Providing support for teachers on the standards they have not yet mastered			3		

Optional Narrative (Limited to 1,500 characters)

6. Provide any additional information in the text box provided in the Dashboard that the LEA believes is relevant to understanding its progress implementing the academic standards adopted by the state board.

Developing a deeper dive into teachers' abilities to teach math and use current resources in a more effective way. Also, including NGSS curriculum development for grades 3-8.

Parental Involvement and Family Engagement (LCFF Priority 3)

Introduction

Family engagement is an essential strategy for building pathways to college and career readiness for all students and is an essential component of a systems approach to improving outcomes for all students. More than 30 years of research has shown that family engagement can lead to improved student outcomes (e.g., attendance, engagement, academic outcomes, social emotional learning, etc.).

Consistent with the California Department of Education's (CDE's) Family Engagement Toolkit: ¹

- Effective and authentic family engagement has been described as an intentional partnership of educators, families and community members who share responsibility for a child from the time they are born to becoming an adult.
- To build an effective partnership, educators, families, and community members need to develop the knowledge and skills to work together, and schools must purposefully integrate family and community engagement with goals for students' learning and thriving.

The LCFF legislation recognized the importance of family engagement by requiring LEAs to address Priority 3 within their LCAP. The self-reflection tool described below enables LEAs to reflect upon their implementation of family engagement as part of their continuous improvement process and prior to updating their LCAP.

For LEAs to engage all families equitably, it is necessary to understand the cultures, languages, needs and interests of families in the local area. Furthermore, developing family engagement policies, programs, and practices needs to be done in partnership with local families, using the tools of continuous improvement.

Instructions

This self-reflection tool is organized into three sections. Each section includes research and evidence-based practices in family engagement:

1. Building Relationships between School Staff and Families
2. Building Partnerships for Student Outcomes
3. Seeking Input for Decision-Making

Based on an evaluation of data, including educational partner input, an LEA uses this self-reflection tool to report on its progress successes and area(s) of need related to family engagement policies, programs, and practices. This tool will enable an LEA to engage in continuous improvement and determine next steps to make improvements in the areas identified. The results of the process should be used to inform the LCAP and its development process, including assessing prior year goals, actions and services and in modifying future goals, actions, and services in the LCAP.

LEAs are to implement the following self-reflection process:

1. Identify the diverse educational partners that need to participate in the self-reflection process in order to ensure input from all groups of families, staff and students in the LEA, including families of unduplicated students and families of individuals with exceptional needs as well as families of underrepresented students.
2. Engage educational partners in determining what data and information will be considered to complete the self-reflection tool. LEAs should consider how the practices apply to families of all student groups, including families of unduplicated students and families of individuals with exceptional needs as well as families of underrepresented students.
3. Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each of the 12 practices using the following rating scale (lowest to highest):
 - 1 – Exploration and Research
 - 2 – Beginning Development
 - 3 – Initial Implementation
 - 4 – Full Implementation
 - 5 – Full Implementation and Sustainability
4. Based on the analysis of educational partner input and local data, respond to each of the prompts pertaining to each section of the tool.
5. Use the findings from the self-reflection process to inform the annual update to the LCAP and the LCAP development process, as well as the development of other school and district plans.

Sections of the Self-Reflection Tool

Section 1: Building Relationships Between School Staff and Families

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Building Relationships	1	2	3	4	5
1. Rate the LEA's progress in developing the capacity of staff (i.e., administrators, teachers, and classified staff) to build trusting and respectful relationships with families.					5
2. Rate the LEA's progress in creating welcoming environments for all families in the community.				4	
3. Rate the LEA's progress in supporting staff to learn about each family's strengths, cultures, languages, and goals for their children.					5
4. Rate the LEA's progress in developing multiple opportunities for the LEA and school sites to engage in 2-way communication between families and educators using language that is understandable and accessible to families.				4	

Building Relationships Dashboard Narrative Boxes (Limited to 3,000 characters)

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Building Relationships Between School Staff and Families.

With our newly dedicated looping model of instruction, teachers have two to three years building community with the parents and student. This allows families, students, and teachers to grow and develop relationships due to the longevity of the grade span that the teacher and family can be together. Also, for the 21-22 school year, we have added an additional family communication platform called ParentSquare. A ParentSquare feature allows for parents to message their teacher and engage in two-way communication. This also includes automatic translation into Spanish on any ParentSquare posts made by the school.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Building Relationships Between School Staff and Families.

Our main focus areas are communication and how to best use ParentSquare as a community communication tool between the school, teachers, parents, and students. Also, we striving to make the enrollment process easier and more accessible by having forms available online. If a parent needs hands on help, we have a dedicated computer in the office that any parent can use in order to get any necessary enrollment paperwork finished.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Relationships Between School Staff and Families.

During our enrollment process, parents are encouraged to volunteer and be a part of any volunteering opportunities that they may have time to participate in during the school year. Partnering with parents starts with the classroom teacher and includes parent meetings, student conferences, and opportunities to participate in school based festivals, celebrations, and rituals. We provide multiple opportunities for parent engagement including but not limited to: The planning of and participation of school wide festivals and celebrations, class parent meetings with the teacher, parent teacher conferences, back to school, Open House, field trip planning and chaperoning, volunteer community response team, partnership with our Foundation, parent surveys, classroom coordinator meetings, individual student/parent check-ins, and our ParentSquare communication platform. In addition the school employs staff who speak languages other than English and we encourage the participation of parents who need assistance with translation by offering communication in their primary language.

Section 2: Building Partnerships for Student Outcomes

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Building Partnerships	1	2	3	4	5
5. Rate the LEA's progress in providing professional learning and support to teachers and principals to improve a school's capacity to partner with families.			3		
6. Rate the LEA's progress in providing families with information and resources to support student learning and development in the home.			3		
7. Rate the LEA's progress in implementing policies or programs for teachers to meet with families and students to discuss student progress and ways to work together to support improved student outcomes.					5
8. Rate the LEA's progress in supporting families to understand and exercise their legal rights and advocate for their own students and all students.			3		

Building Partnerships Dashboard Narrative Boxes (Limited to 3,000 characters)

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Building Partnerships for Student Outcomes.

One of the core strategies we employ to build relationships is to have students and families loop with their teacher for two to three years. That way students, families, and teachers have the opportunity for multiple years in developing and assisting with the academic, social/emotional, and physical development/changes during the growth of the student. The relationship develops as the student and families move through the grades. The teachers engage all families in regular newsletters, communication, parent conferences and reports. The teachers share resources for parent partnership opportunities to help the students' progress. Parents are informed of their legal rights and they are encouraged to advocate for their children. We continue developing opportunities for communication in order to inform parents, students and teachers about current events, upcoming events, school requests, schedules, enrollment, academic program, news, alerts and others as a means to inform.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Building Partnerships for Student Outcomes.

Our focus areas for improvement in building partnerships for student outcomes are Special Education meetings and parent rights and two way communication platforms to stay connected with the teacher for student support at home. We will also continue looking at providing mental health services to address student need. Additionally, we continue to provide small group and/or one on one instructional pull out services under our MTSS model as well as tutoring after school during our AfterCare program.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Partnerships for Student Outcomes.

We will continue to offer Spanish translation to every school post that goes out via ParentSquare. Also, our enrollment efforts include active recruitment in underrepresented families.

Section 3: Seeking Input for Decision-Making

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA’s current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- Rating Scale (lowest to highest) -
- 1 - Exploration and Research Phase
 - 2 - Beginning Development
 - 3 - Initial Implementation
 - 4 - Full Implementation
 - 5 - Full Implementation and Sustainability

Seeking Input	1	2	3	4	5
9. Rate the LEA’s progress in building the capacity of and supporting principals and staff to effectively engage families in advisory groups and with decision-making.					5
10. Rate the LEA’s progress in building the capacity of and supporting family members to effectively engage in advisory groups and decision-making.			3		
11. Rate the LEA’s progress in providing all families with opportunities to provide input on policies and programs, and implementing strategies to reach and seek input from any underrepresented groups in the school community.			3		
12. Rate the LEA’s progress in providing opportunities to have families, teachers, principals, and district administrators work together to plan, design, implement and evaluate family engagement activities at school and district levels.			3		

Seeking Input for Decision-Making Dashboard Narrative Boxes (Limited to 3,000 characters)

- Based on the analysis of educational partner input and local data, briefly describe the LEA’s current strengths and progress in Seeking Input for Decision-Making.

Overall the community has high capacity with engagement and support to participate in advisory groups and decision making by actively participating in our Community Resource Team with Communications, School Festivities/Celebrations, and Volunteerism as sub groups. Additionally, we have dedicated parent roles called classroom coordinator and they work directly with the teacher with events, field trips and other festivities like class plays and celebrations.

- Based on the analysis of educational partner input and local data, briefly describe the LEA’s focus area(s) for improvement in Seeking Input for Decision-Making.

A strength in parent engagement comes through a variety of opportunities that families have to engage with their teacher and provide input. Also the parent body has opportunities for engagement on school governance via the Board. Additional opportunities for engagement include parent conferences, Student Study Team meetings, 504 meetings, classroom coordinator meetings, and Town Halls. We continue to use multi-lingual messaging and translation as needed for families whose primary language is a language other than English. We communicate outcomes of decisions via ParentSquare to all families including underrepresented families.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Seeking Input for Decision-Making.

Provide one on one training, including access to a dedicated computer in the main office, on how to access school communication platform ParentSquare. Continuation of all school messaging being accessed from either a mobile account or computer and each message to be translated into Spanish.

School Climate (LCFF Priority 6)

LEAs will provide a narrative summary of the local administration and analysis of a local climate survey that captures a valid measure of student perceptions of school safety and connectedness in at least one grade within the grade span (e.g., K–5, 6–8, 9–12) in a text box provided in the California School Dashboard (response limited to 3,000 characters). LEAs will have an opportunity to include differences among student groups, and for surveys that provide an overall score, such as the California Healthy Kids Survey, report the overall score for all students and student groups. This summary may also include an analysis of a subset of specific items on a local survey and additional data collection tools that are particularly relevant to school conditions and climate.

1. **DATA:** Reflect on the key learnings from the survey results and share what the LEA learned.
2. **MEANING:** What do the disaggregated results (if applicable) of the survey and other data collection methods reveal about schools in the LEA, such as areas of strength or growth, challenges, and barriers?
3. **USE:** What revisions, decisions, or actions has, or will, the LEA implement in response to the results for continuous improvement purposes? Why? If you have already implemented actions, did you see the results you were seeking?

1. DATA: Reflect on the key learnings from the survey results and share what the LEA learned.

Students reported with a very favorable opinion of their school experience including core academic instruction. Due to being the first year back from distance learning, the data is one year removed from the most accurate picture of information is based on the most recent year students were attending in-person instruction. The reorganization of the middle school program, continues to be a successful and popular change and was met with increased satisfaction by a majority of the student population. Over 90% of students report that they have not been targeted or harassed by other students. 78% note that if they did feel targeted, they know who they can go to in order to receive help which is important to note with an increase awareness of bullying in today's society. Students again reported low at risk factors include presence of controlled substances, violence or cyberbullying. We attribute the success of students' increase of awareness in addressing social concerns to directly correlate with having relationships with all MS teachers instead of only one. This gives them a stronger bond to the MS as a whole and builds more connection between students and teachers.

2. MEANING: What do the disaggregated results (if applicable) of the survey and other data collection methods reveal about schools in the LEA, such as areas of strength or growth, challenges, and barriers?

The reorganization of the middle school program is in year 4 of successful implementation. This was a significant departure for the school in its 21 year history. Student response appears strongly favorable, and was matched by similar results in the parent survey. The goals of the program change were intended to provide greater subject area expertise in instruction as well as smaller class sizes for core academic subjects, thus increasing instructional responsiveness. These objectives appear to have been received well by the student population, teachers, and parents.

Although there were no reports of bullying, students did have hurt feelings especially as they relate to social situations and being accepted. In general students reported that they are healthy, don't use drugs and happy at school. In past years we hosted Challenge Day and during those years that event may have skewed data by having an increase in reporting of being bullied given the course content from the event. We want to continue providing students with the social skills to mitigate social conflicts and to empower them to solve their own peer to peer

conflicts. Also, since a strong majority report being happy and not receiving harassing behaviors from peers, we could look at when a peer to peer conflict arises, how is it best handled and how can students learn to take responsibility for their part of the situation.

3. USE: What revisions, decisions, or actions has, or will, the LEA implement in response to the results for continuous improvement purposes? Why? If you have already implemented actions, did you see the results you were seeking?

Live Oak will continue into year 5 of its revised middle school model. Given the student feedback, it is being implemented with success. For the 2022-23 school year, we look to continue to provide Professional Development for teachers and staff on Adverse Childhood Experiences and increasing capacity for teaching math. The reason is to help build awareness around trauma informed practices and to better understand and build empathy towards individual student situations as well as focus on building stronger math focus and consistency of practices throughout the elementary grades.

Access to a Broad Course of Study (LCFF Priority 7)

LEAs provide a narrative summary of the extent to which all students have access to and are enrolled in a broad course of study by addressing, at a minimum, the following four prompts:

1. Briefly identify the locally selected measures or tools that the LEA is using to track the extent to which all students have access to, and are enrolled in, a broad course of study, based on grade spans, unduplicated student groups, and individuals with exceptional needs served. (response limited to 1,500 characters)
2. Using the locally selected measures or tools, summarize the extent to which all students have access to, and are enrolled in, a broad course of study. The summary should identify any differences across school sites and student groups in access to, and enrollment in, a broad course of study, and may describe progress over time in the extent to which all students have access to, and are enrolled in, a broad course of study. (response limited to 1,500 characters)
3. Given the results of the tool or locally selected measures, identify the barriers preventing the LEA from providing access to a broad course of study for all students. (response limited to 1,500 characters)
4. In response to the results of the tool or locally selected measures, what revisions, decisions, or new actions will the LEA implement, or has the LEA implemented, to ensure access to a broad course of study for all students? (response limited to 1,500 characters)

1. The locally selected measures or tools used to track the extent to which all students have access to, and are enrolled in, a broad course of study, based on grade spans, unduplicated student groups, and individuals with exceptional needs served.

Live Oak uses a curriculum guided by the Core Principles for the Alliance of Public Waldorf Education. While Live Oak Charter School is committed to covering all Common Core State Standards in Kindergarten through 8th Grade by the end of the 8th Grade, we do so on a different time-table from traditional public schools. The Live Oak Leadership team and Administration work collaboratively to develop a daily schedule that makes sure all students have access to a broad course of study. Main Lessons are taught in blocks of approximately three to six weeks. Each block has a topic of study, (ELA, Math, Science, History, Geography) and all the activities during the Main Lesson, which include speech, music, movement, written work, artistic work, revolve around the topic. Students create their own textbooks, known as Main Lesson Books, to record the information they are learning. Additionally, students have the opportunity to study with Specialty Teachers. Specialty Teachers are skilled professionals that either have their teaching credential or are working on their teaching credential that teach subjects such as Music, Movement, Handwork and Math. All students are enrolled in and participate in all of the classes throughout the school year. Our Multi-tiered System of Support (MTSS) provides a broad spectrum of support including students with exceptional needs.

2. A summary of the differences across school sites and student groups having access to, and are enrolled in, a broad course of study, and may include a description of progress over time in the extent to which all students have access to, and are enrolled in, a broad course of study.

To ensure that students have this foundation for healthy learning, Live Oak is committed to foster healthy relationships within the community of students, teachers, and parents. We do this through fostering an environment of warmth, growth, compassion, and respect, utilizing open, direct communication that embraces growth and human striving. This is reflected in our School's Core Values. Additionally, we use a MTSS to help monitor and provide appropriate interventions within the academic realm or with student comportment. This process includes Response to Intervention (RTI) and its tiered level of academic interventions as well as Restorative Justice approaches and Positive Behavior Interventions and supports with student behaviors and social emotional well being. Through faculty and Leadership team evaluation of CAASPP scores, Core phonics, Fountas and Pinnell assessments and STAR formative assessments, we make sure that all students are accessing a broad course of study regardless of abilities and needs. We compare our results over a multi-year span to ensure overall progress of the whole student body, in addition to sub-groups.

3. Identification of any barriers preventing access to a broad course of study for all students.

We have met this criteria for providing access to a broad course of study for all students.

4. Revisions, decisions, or new actions that will be implemented, or has been implemented, to ensure access to a broad course of study for all students.

The Academic Coaching Team specializes in early literacy and math development and is a second tier level of Response to Intervention. All classes include access to support from Paraprofessionals that work with students with differing learning styles in order to address multiple intelligences. At times, instructional remediation may not be sufficient, and in this case a student would be referred to the SST team for a more customized intervention plan drawn up by the RTI Coordinator, Classroom Teacher, and the parents with specific goals and interventions. The RTI Coordinator would meet with the classroom teacher to hear concerns and offer instructional support. Within the SST, specific concerns are noted with data and then goals and interventions are established in order to mitigate the ongoing concern. Also, the RTI Coordinator may recommend support to the classroom teacher, in the form of books, practical classroom suggestions, or discuss other areas of expertise to serve a student. A subsequent step may involve referring a student to testing by the Resource Team, and possibly an Individual Education Plan. Overall, we will continue providing access to a broad course of study for all our students.

Coordination of Services for Expelled Students – COE Only (LCFF Priority 9)

Assess the degree of implementation of the progress in coordinating instruction for expelled students in your county.

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Coordinating Instruction	1	2	3	4	5
1. Assessing status of triennial plan for providing educational services to all expelled students in the county, including:	[No response required]	[No response required]	[No response required]	[No response required]	[No response required]
a. Review of required outcome data.					

Coordinating Instruction	1	2	3	4	5
b. Identifying existing educational alternatives for expelled pupils, gaps in educational services to expelled pupils, and strategies for filling those service gaps.					
c. Identifying alternative placements for pupils who are expelled and placed in district community day school programs, but who fail to meet the terms and conditions of their rehabilitation plan or who pose a danger to other district pupils.					
2. Coordinating on development and implementation of triennial plan with all LEAs within the county.					
3. Establishing ongoing collaboration and policy development for transparent referral process for LEAs within the county to the county office of education or other program options, including dissemination to all LEAs within the county a menu of available continuum of services for expelled students.					
4. Developing memorandum of understanding regarding the coordination of partial credit policies between district of residence and county office of education.					

Coordination of Services for Foster Youth – COE Only (LCFF Priority 10)

Assess the degree of implementation of coordinated service program components for foster youth in your county.

Rating Scale (lowest to highest) -

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Coordinating Services	1	2	3	4	5
1. Establishing ongoing collaboration and supporting policy development, including establishing formalized information sharing agreements with child welfare, probation, Local Education Agency (LEAs), the courts, and other organizations to support determining the proper educational placement of foster youth (e.g., school of origin versus current residence, comprehensive versus alternative school, and regular versus special education).					
2. Building capacity with LEA, probation, child welfare, and other organizations for purposes of implementing school-based support infrastructure for foster youth intended to improve educational outcomes (e.g., provide regular professional development with the Foster Youth Liaisons to facilitate adequate transportation services for foster youth).					
3. Providing information and assistance to LEAs regarding the educational needs of foster youth in order to improve educational outcomes.					
4. Providing direct educational services for foster youth in LEA or county-operated programs provided the school district has certified that specified services cannot be provided or funded using other sources, including, but not limited to, Local Control Funding Formula, federal, state or local funding.					
5. Establishing ongoing collaboration and supporting development of policies and procedures that facilitate expeditious transfer of records, transcripts, and other relevant educational information.					
6. Facilitating the coordination of post-secondary opportunities for youth by engaging with systems partners, including, but not limited to, child welfare transition planning and independent living services, community colleges or universities, career technical education, and workforce development providers.					

Coordinating Services	1	2	3	4	5
7. Developing strategies to prioritize the needs of foster youth in the community, using community-wide assessments that consider age group, geographical area, and identification of highest needs students based on academic needs and placement type.					
8. Engaging in the process of reviewing plan deliverables and of collecting and analyzing LEA and COE level outcome data for purposes of evaluating effectiveness of support services for foster youth and whether the investment in services contributes to improved educational outcomes for foster youth.					