

BOARD OF TRUSTEES AGENDA

Tuesday, January 10, 2023

Library

5:30 p.m. – Regular Session

Any materials required by law to be made available to the public prior to a meeting of the Board of Education of the District can be inspected at the above address during normal business hours.

Individuals who require special accommodations including, but not limited to, American Sign Language interpreter, accessible seating or documentation in accessible formats should contact the superintendent or designee within a reasonable time before the meeting date.

Governing Board Members

Shannon Clay, President

Kelly Salas-Ernst, Clerk

Thomas Gibbons, Trustee

Daniella Pearce, Trustee

Jeania Reasner, Trustee

I. PUBLIC SESSION: 5:30 p.m. Call to Order and Flag Salute

II. Welcome Guests

III. Reports

A. Charter School Reports

- i. Family Partnership Charter School**
- ii. Trivium Charter School**
- iii. Trivium Charter School: Adventure**
- iv. Trivium Charter School: Voyage**

B. Teacher Reports

C. Superintendent/Principal's Report

IV. ITEMS SCHEDULED FOR INFORMATION - none

V. ITEMS SCHEDULED FOR DISCUSSION

A. LCAP Goals

- i. Goal 1 - Improve student outcomes in math.**
- ii. Goal 2 - Improve student outcomes in science.**
- iii. Goal 3 – Improve English Learner ELPAC test scores and reclassification rates.**

- iv. Goal 4 – Improve school engagement, including parent involvement, pupil engagement, and school climate.
- v. Goal 5 – Improve student outcomes in English/Language Arts.

B. Status of water tanks on the hill.

C. Facilities

- i. General maintenance
- ii. Cafeteria improvements

VI. CONSENT AGENDA ITEMS

A. Approval of Minutes

- i. Minutes of December 13, 2022 Regular Meeting

***** IT IS RECOMMENDED THAT the Board of Education approve the Minutes as presented:**

MOVED:

SECOND:

VOTE:

Shannon Clay:

Jeania Reasner:

Daniella Pearce:

Kelly Salas-Ernst:

Thomas Gibbons:

B. Approval of Monthly Warrants – December, 2022

i. Payroll	\$196,918.18
ii. Commercial Warrants	\$313,458.98
iii. Revolving Fund	\$ 0.00
TOTAL	\$ 510,377.16

***** IT IS RECOMMENDED THAT the Board of Education approve the Warrants as presented:**

MOVED:

SECOND:

VOTE:

Shannon Clay:

Jeania Reasner:

Daniella Pearce:

Kelly Salas-Ernst:

Thomas Gibbons:

C. Approval of the following Trivium Charter School reports:

- i. Trivium Charter School 2022/2023 First Interim report
- ii. Trivium Charter School: Adventure 2022/2023 First Interim report
- iii. Trivium Charter School: Voyage 2022/2023 First Interim report
- iv. Trivium Charter School 2021/2022 Audit Report

***** IT IS RECOMMENDED THAT the Board of Education approve the Trivium Charter School reports as presented:**

MOVED:
VOTE:
Shannon Clay:
Daniella Pearce:
Thomas Gibbons:

SECOND:

Jeania Reasner:
Kelly Salas-Ernst:

-
- D. Approval of Family Partnership Charter School's reports:**
- i. Family Partnership Charter School 2022/2023 First Interim report**
 - ii. Family Partnership Charter School 2022/2023 P-1 Attendance report**
 - iii. Family Partnership Charter School 2021/2022 Audit Report**

***** IT IS RECOMMENDED THAT the Board of Education approve the Family Partnership Charter School's reports as presented:**

MOVED:
VOTE:
Shannon Clay:
Daniella Pearce:
Thomas Gibbons:

SECOND:

Jeania Reasner:
Kelly Salas-Ernst:

VII. ITEMS SCHEDULED FOR ACTION

A. Approval of December 2022 Benjamin Foxen Elementary Attendance Report

***** IT IS RECOMMENDED THAT the Board of Education take action to approve the attendance report as presented:**

MOVED:
VOTE:
Shannon Clay:
Daniella Pearce:
Thomas Gibbons:

SECOND:

Jeania Reasner:
Kelly Salas-Ernst:

B. Approval of Blochman Union School District's 2022/2023 P-1 Attendance Report

***** IT IS RECOMMENDED THAT the Board of Education take action to approve Blochman Union School District's 2022/21023 P-1 Attendance Report as presented:**

MOVED:
VOTE:
Shannon Clay:
Daniella Pearce:
Thomas Gibbons:

SECOND:

Jeania Reasner:
Kelly Salas-Ernst:

C. Approval of the following revised board policies and administrative regulations: BP 0403; AR 0403; BP 0450; AR 0450; BP 0460; AR 0460; BP 3250; AR 3250; BP 3260;

AR 3260; BP 3460; AR 3460; BP 3515; AR 3515; AR 3516.2; BP 3540; BP 5131.7; AR 5131.7; AR 5141.3; BP 5142; AR 5142; BP 5148.2; AR 5148.2; BP 5148.3; AR 5148.3; AR 6164.4; BB 9220; BB 9223; BB 9323.

***** IT IS RECOMMENDED THAT the Board of Education take action to approve the revised board policies and administrative regulations as presented:**

MOVED:	SECOND:
VOTE:	
Shannon Clay:	Jeania Reasner:
Daniella Pearce:	Kelly Salas-Ernst:
Thomas Gibbons:	

D. Approval to allow Golden State Water Company to remove the two water tanks on the hill once they are abandoned by Golden State Water Company.

***** IT IS RECOMMENDED THAT the Board of Education take action to approve that Golden State Water Company remove the two water tanks on the hill as presented:**

MOVED:	SECOND:
VOTE:	
Shannon Clay:	Jeania Reasner:
Daniella Pearce:	Kelly Salas-Ernst:
Thomas Gibbons:	

E. Approval to keep the two water tanks on the hill once they are abandoned by Golden State Water Company.

***** IT IS RECOMMENDED THAT the Board of Education take action to keep the two water tanks on the hill as presented:**

MOVED:	SECOND:
VOTE:	
Shannon Clay:	Jeania Reasner:
Daniella Pearce:	Kelly Salas-Ernst:
Thomas Gibbons:	

VIII. PUBLIC COMMENTS

PUBLIC COMMENTS ARE WELCOME

The Blochman Union School District will receive public comments about items not appearing on today's agenda, as well as other matters within the subject matter jurisdiction of the Board. All such comments will be received during the Public Comments section of the agenda. Individuals who address the Board are limited to three (3) minutes to speak on any item and a total of 10 minutes on all items for their presentation. The Board may limit the total time for all public comment to 30 minutes. Persons needing additional time are requested to submit the information in writing.

For comments concerning matters not on the agenda, open meeting laws and fairness to other residents who may have an interest in your topic prohibit the Board from taking action or engaging in extended discussion of your concerns. The Board may direct staff to meet at a later date with speakers who have specific concerns or needs. The Board may also direct that an issue be placed on a future agenda for discussion and consideration. This permits the Board and staff members to prepare and receive necessary information and for the public to be aware that a topic is being formally considered. We appreciate your cooperation.

IX. MISCELLANEOUS AGENDA ITEMS

A. Items Proposed for Future Action or Discussion

B. Blochman Union School District Board Member Items

C. Items not on the Agenda

**D. Next Scheduled Board Meeting: February 14, 2022; open session at 5:30 p.m.,
Library**

X. CLOSED SESSION: The board will consider and may act on the following during closed session:

A. Certificated and Classified Personnel Actions

i. The board will be asked to review and approve hiring, transfers, promotion, evaluations, terminations, and resignations.

**ii. Government Code Section 54957: Public Employee
Discipline/Dismissal/Release/ Reassignment**

XI. RECONVENE IN OPEN SESSION

A. Report of action taken during closed session.

XII. Adjourn

TIME: _____

MOVED:

VOTE:

Shannon Clay:

Daniella Pearce:

Thomas Gibbons:

SECOND:

Jeania Reasner:

Kelly Salas-Ernst:

VI - A

**MINUTES OF THE BOARD OF TRUSTEES
BLOCHMAN UNION SCHOOL DISTRICT
DECEMBER 13, 2022**

A regular meeting of the Board of Education of the Blochman Union School District was held at the Benjamin Foxen Elementary School Library on December 13, 2022.

Members present: Shannon Clay, Thomas Gibbons, Jeania Reasner, and Kelly Salas-Ernst. Absent: Daniella Pearce.

I. PUBLIC SESSION: Mrs. Clay called the meeting to order at 5:30 p.m., led the flag salute, and welcomed guests.

A. Mr. Brown administered the Oath of Office to newly elected board members Shannon Clay and Thomas Gibbons.

II. Reports

A. Charter School Reports

- i. **Family Partnership Charter School** – Stephanie Eggert presented the Family Partnership Charter School report, a copy of which is attached.
- ii. **Trivium Charter Schools** – Trisha Vais reported that things are going well. Enrollment is approximately 870. There have been some behavior issues. They just staged the Classical Showcase and students will be participating in Winter Wonderland activities this week. They are currently having a problem with the Sales Force contract.

B. Teacher Reports – none.

C. Superintendent/Principal's Report – Doug Brown reported that we currently have 190 students. The Robotics team competed at a regional event. A special thanks to the coaches for all their hard work. Basketball practice has begun. Students in grades K – 5 will attend a PCPA production of *Cinderella* this week. The staff party on Friday was fun.

III. ITEMS SCHEDULED FOR INFORMATION

A. Facilities update – Mr. Brown reported that he had someone look at the playground for possible safety updates. The well is using more electricity than it should be. Mrs. Clay will give us the number for someone to come out to inspect the well. The two sheds have been installed and Joe will finish installing the water stations over Christmas break. We received notice that we were granted matching dollars from the state to add a new classroom wing. However, Mr. Brown feels that with higher costs due to inflation, this is not the best time for new construction. We will investigate replacing windows and doors.

B. Facilities use

- i. **Jeania Reasner; tables and chairs; November 18 – 20, 2022**
- ii. **Jeania Reasner; tables and chairs; December 21 – 23, 2022**
- iii. **Jeania Reasner; tables; December 2 – 5, 2022**

IV. ITEMS SCHEDULED FOR DISCUSSION

A. Water tanks – The board discussed whether to keep the water tanks. They asked Mr. Brown to ask Golden State Water about the easement allowing us access to the tanks.

V. CONSENT AGENDA ITEMS

A. Approval of Minutes

i. Minutes of November 8, 2022 Regular Meeting

***** IT IS RECOMMENDED THAT the Board of Education approve the minutes as presented:**

MOVED:	Kelly Salas-Ernst	SECOND:	Jeania Reasner
VOTE:			
Shannon Clay:	Aye	Jeania Reasner:	Aye
Daniella Pearce:	Absent	Kelly Salas-Ernst:	Aye
Thomas Gibbons:	Aye		

B. Approval of Monthly Warrants – November 2022

i. Commercial Warrants	\$ 59,604.32
ii. Payroll	\$197,342.04
iii. Revolving Fund	\$ 0.00
TOTAL	\$256,946.36

IT IS RECOMMENDED THAT the Board of Education approve the Warrants as presented:

MOVED:	Jeania Reasner	SECOND:	Thomas Gibbons
VOTE:			
Shannon Clay:	Aye	Jeania Reasner:	Aye
Daniella Pearce:	Absent	Kelly Salas-Ernst:	Aye
Thomas Gibbons:	Aye		

VI. ITEMS SCHEDULED FOR ACTION

A. Approval of the Governing Board meeting schedule for 2023 (Attachment A).

*****IT IS RECOMMENDED THAT the Board of Education take action to approve the 2023 Governing Board meeting schedule as presented:**

MOVED:	Jeania Reasner	SECOND:	Thomas Gibbons
VOTE:			
Shannon Clay:	Aye	Jeania Reasner:	Aye
Daniella Pearce:	Absent	Kelly Salas-Ernst:	Aye
Thomas Gibbons:	Aye		

B. Election of the 2023 School Board President (Attachment B).

Jeania Reasner nominated Shannon Clay to be Board President.

VOTE:

Shannon Clay: Abstain
Daniella Pearce: Absent
Thomas Gibbons: Aye

Jeania Reasner: Aye
Kelly Salas-Ernst: Aye

*****The Board elects Shannon Clay as the 2023 School Board President**

C. Election of the 2023 School Board Clerk/Secretary (Attachment B).

Shannon Clay nominated Kelly Salas-Ernst to be Board Clerk/Secretary.

VOTE:

Shannon Clay: Aye
Daniella Pearce: Absent
Thomas Gibbons: Aye

Jeania Reasner: Aye
Kelly Salas-Ernst: Abstain

*****The Board elects Kelly Salas-Ernst as the 2023 School Board Clerk/Secretary.**

D. Election of the 2023 School Board Representative to the County Committee on School District Organization (Attachment C).

Kelly Salas-Ernst nominated Daniella Pearce to be the School Board Representative to the County Committee on School District Organizations.

VOTE:

Shannon Clay: Aye
Daniella Pearce: Absent
Thomas Gibbons: Aye

Jeania Reasner: Aye
Kelly Salas-Ernst: Aye

*****The Board elects Daniella Pearce as the 2023 School Board Representative to the County Committee on School District Organization.**

E. Approval of district personnel for Release of Commercial and Payroll warrants (Attachment E).

*****IT IS RECOMMENDED THAT the Board of Education take action to approve the district personnel for release of commercial and payroll warrants as presented:**

MOVED: Kelly Salas-Ernst

SECOND: Jeania Reasner

VOTE:

Shannon Clay: Aye
Daniella Pearce: Absent
Thomas Gibbons: Aye

Jeania Reasner: Aye
Kelly Salas-Ernst: Aye

F. Approval of the district personnel to act as District Agents (Attachment F).

*****IT IS RECOMMENDED THAT the Board of Education take action to approve the district personnel to act at district agents as presented:**

MOVED:	Kelly Salas-Ernst	SECOND:	Jeania Reasner
VOTE:			
Shannon Clay:	Aye	Jeania Reasner:	Aye
Daniella Pearce:	Absent	Kelly Salas-Ernst:	Aye
Thomas Gibbons:	Aye		

G. Approval of the Resolution of the Governing Board Delegating the Authority to Make Cash and Budget Transfers (Attachment G-1).

*****IT IS RECOMMENDED THAT the Board of Education take action to approve the Resolution Delegating the Authority to Make Cash and Budget Transfers as presented:**

MOVED:	Kelly Salas-Ernst	SECOND:	Jeania Reasner
VOTE:			
Shannon Clay:	Aye	Jeania Reasner:	Aye
Daniella Pearce:	Absent	Kelly Salas-Ernst:	Aye
Thomas Gibbons:	Aye		

H. Approval of Benjamin Foxen Elementary School November 2022 Attendance Report.

***** IT IS RECOMMENDED THAT the Board of Education approve the Benjamin Foxen Elementary School November 2022 Attendance Report as presented:**

MOVED:	Jeania Reasner	SECOND:	Thomas Gibbons
VOTE:			
Shannon Clay:	Aye	Jeania Reasner:	Aye
Daniella Pearce:	Absent	Kelly Salas-Ernst:	Aye
Thomas Gibbons:	Aye		

I. Approval of Blochman Union School District's 2021/2022 audit report.

*****IT IS RECOMMENDED THAT the Board of Education take action to approve Blochman Union School District's 2021/2022 audit report as presented:**

MOVED:	Jeania Reasner	SECOND:	Kelly Salas-Ernst
VOTE:			
Shannon Clay:	Aye	Jeania Reasner:	Aye
Daniella Pearce:	Absent	Kelly Salas-Ernst:	Aye
Thomas Gibbons:	Aye		

J. Approval of Blochman Union School District's classified salary schedules for 2022/2023 and 2023/2024.

*****IT IS RECOMMENDED THAT the Board of Education take action to approve Blochman Union School District's 2022/2023 and 2023/2024 classified salary schedules as presented:**

MOVED:	Jeania Reasner	SECOND:	Thomas Gibbons
VOTE:			
Shannon Clay:	Aye	Jeania Reasner:	Aye
Daniella Pearce:	Absent	Kelly Salas-Ernst:	Abstain
Thomas Gibbons:	Aye		

K. Approval of Blochman Union School District's 2023/2024 Special Education Director/School Psychologist salary schedule.

*****IT IS RECOMMENDED THAT the Board of Education take action to approve Blochman Union School District's 2023/2024 Special Education Director/School Psychologist salary schedule:**

MOVED:	Kelly Salas-Ernst	SECOND:	Jeania Reasner
VOTE:			
Shannon Clay:	Aye	Jeania Reasner:	Aye
Daniella Pearce:	Absent	Kelly Salas-Ernst:	Aye
Thomas Gibbons:	Aye		

L. Approval of Blochman Union School District's 2023/2024 Superintendent/Principal salary schedule.

*****IT IS RECOMMENDED THAT the Board of Education take action to approve Blochman Union School District's 2023/2024 Superintendent/Principal salary schedule:**

MOVED:	Jeania Reasner	SECOND:	Thomas Gibbons
VOTE:			
Shannon Clay:	Aye	Jeania Reasner:	Aye
Daniella Pearce:	Absent	Kelly Salas-Ernst:	Aye
Thomas Gibbons:	Aye		

M. Approval of Blochman Union School District's 2022/2023 First Interim report.

*****IT IS RECOMMENDED THAT the Board of Education take action to approve Blochman Union School District's 2022/2023 First Interim report as presented:**

MOVED:	Jeania Reasner	SECOND:	Thomas Gibbons
VOTE:			
Shannon Clay:	Aye	Jeania Reasner:	Aye
Daniella Pearce:	Absent	Kelly Salas-Ernst:	Aye
Thomas Gibbons:	Aye		

N. Approval to allow Golden State Water Company to remove the two water tanks on the hill once they are abandoned by Golden State Water Company.

***The board requested that this item be put on the next meeting's agenda.

O. Approval to keep the two water tanks on the hill once they are abandoned by Golden State Water Company.

***The board requested that this item be put on the next meeting's agenda.

P. Approval of donations:

- a. Golden State Water Company; \$300; to purchase food gift cards for students
- b. Santa Maria Kiwanis for Kids, Inc.; \$5,344; ASB 8th Grade

*** IT IS RECOMMENDED THAT the Board of Education take action to approve the donations as presented:

MOVED:	Jeania Reasner	SECOND:	Kelly Salas-Ernst
VOTE:			
Shannon Clay:	Aye	Jeania Reasner:	Aye
Daniella Pearce:	Absent	Kelly Salas-Ernst:	Aye
Thomas Gibbons:	Aye		

VII. PUBLIC COMMENTS - none.

VIII. MISCELLANEOUS AGENDA ITEMS

- A. Items Proposed for Future Action or Discussion – none.
- B. Blochman Union School District Board Member Items – Mrs. Salas-Ernst and Mrs. Reasner wished everyone a Merry Christmas and Happy New Year.
- C. Items not on the Agenda – none.
- D. The next regular board meeting will be held on January 10, 2023, open session at 5:30 p.m., Library.

X. CLOSED SESSION – The board adjourned to closed session at 6:22 p.m. where they will consider and may act on the following:

A. Certificated and Classified Personnel Actions

- i. The board will be asked to review and approve hiring, transfers, promotion, evaluations, terminations, and resignations.
- ii. Government Code Section 54957: Public Employee Discipline/Dismissal/Release/ Reassignment

XI. RECONVENE IN OPEN SESSION

- A. The board reconvened in open session at 6:40 p.m. Mrs. Salas-Ernst reported that the board voted in closed session to move forward with termination proceedings for a permanent certificated employee. The vote was as follows:

MOVED:	Jeania Reasner	SECOND:	Thomas Gibbons
VOTE:			
Shannon Clay:	Aye	Jeania Reasner:	Aye
Daniella Pearce:	Absent	Kelly Salas-Ernst:	Aye
Thomas Gibbons:	Aye		

XII. Adjourn

TIME: 6:41 p.m.

MOVED:	Jeania Reasner	SECOND:	Kelly Salas-Ernst
VOTE:			
Shannon Clay:	Aye	Jeania Reasner:	Aye
Daniella Pearce:	Absent	Kelly Salas-Ernst:	Aye
Thomas Gibbons:	Aye		

FPCS Administration and Center Reports

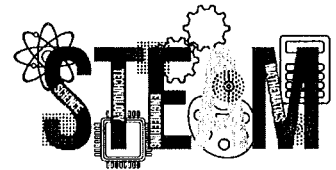
Admin Office Report

TOTAL ENROLLMENT: 383

- The Community Connections Committee established ways to show our presence in the SM and SLO communities. The first was the Annual Tree Gala. Next... a SLO spring event to participate



- All committees are working on projects to update K-5 6-8 and 9-12 curriculums, student supports, and Social Emotional Learning staff training (*rosters of committees following*)
- STEAM Exhibition 2023 - formerly Science Fair. Three dates have been requested from Parks and Recreation for the end of February or first Friday in March.
 - save the date flier sent before break
 - classroom launch with PPT describing STEAM examples
 - age appropriate packets sent home
 - K-8 mandatory; 9-12 encouraged
- All school pictures and Vision and Hearing Screeners have been completed. Thank you to Sydney Vincent, Program Specialist
- Winter Formal February 4th is a go with 30 high school students responding their interest... free tickets available after break
- Principal Sharie Strasburger continues to visit all center staff and students regularly.
- As the Admin Team has transitioned with a new member. We met and created a first Point of Contact document which is being rolled out to all staff



FPCS Administration and Center Reports

Morro Bay Montessori

Enrollment: 61

- In late October, the 2nd-5th graders presented their "Biography Day" projects. They researched a famous person, dressed up as that person, and presented a slide show or project-board about the person.



- We had a "Wild Hair Day" on the Friday before Halloween.
- Just before the Thanksgiving break, we finally held our annual Stone Soup Celebration event in person again. All the students brought vegetables for the soup, created decorations in mixed age groups and then sat down all together in the large room for lunch. After school, families joined as we walked the four blocks to the fire station and dropped off all the donated food we've collected.



Santa Maria Center

Enrollment: 52

- October 28th SMC conducted their Jog-A-Thon prior COVID. Huge success with all hands on deck. Students, Staff, and Parents participated in the event to raise money for center expenses.



FPCS Administration and Center Reports

- 11/20-SMC grades 2nd/3rd attended the Ellwood Mesa Butterfly exhibit. Students were provided the experience to learn about butterflies-their life span, migratory patterns, and habitat.



- Gearing up towards finishing strong heading into the Winter Break.

Solvang Center

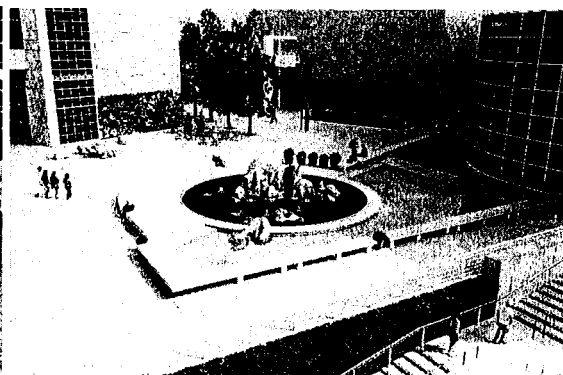
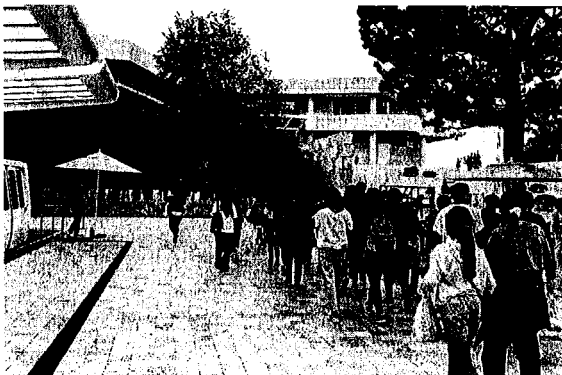
Enrollment: 45

- Advisors working hard at encouraging students to attend in person at the center for extra help.
- 12/16-Senior Project Presentations. Looking forward to celebrating the Solvang Seniors and their Projects. The day will kick off with Seniors each presenting their projects and taking questions. Additionally, we will all celebrate together with a lunch brought in for all participants.
- The Solvang Center is glad to welcome our newest team members Cynthia Silva (Clerical) and Alison Riede (Advisor and Newly added electives-Color and Design and Culinary)

Orcutt Center

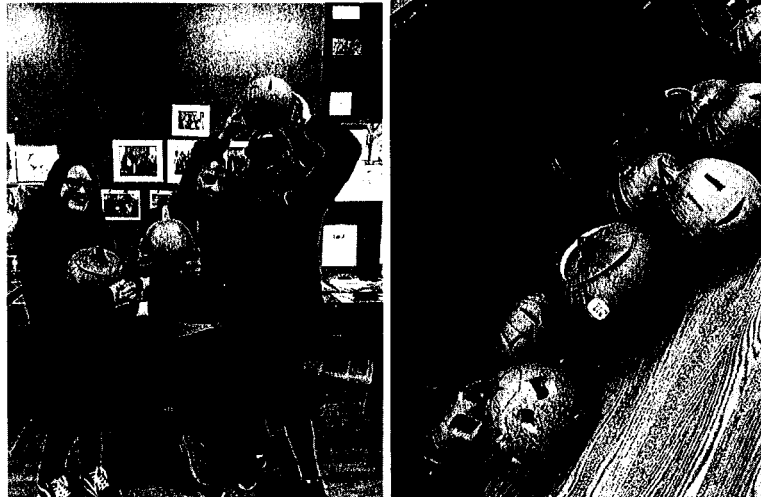
Enrollment: 112

- On October 13th, Orcutt Middle School traveled to the Getty Museum in Los Angeles. Families, students, and staff enjoyed the in-person art tour of the museum with the knowledgeable docents. Another MS field trip is planned for 12/7 to see the PCPA play, *Cinderella*.



- MS celebrated pumpkin day - teachers incorporated math by measuring pumpkins and counting pumpkin seeds (i.e circumference of a pumpkin, estimate of seeds, weight estimates)

FPCS Administration and Center Reports



- High school and middle school will receive a guest presentation on drug prevention on 12/9 and 12/13 in person from Fighting Back Santa Maria.
- Ping pong tournaments for HS and MS coming next semester.

San Luis Obispo Center

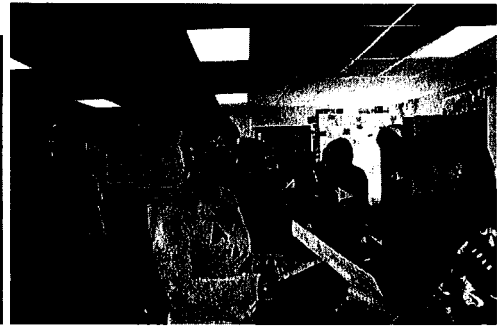
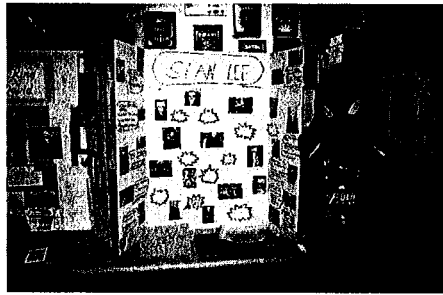
Enrollment: 89

- SLO Center staff, students and their families enjoyed the field trip to Monterey Bay Aquarium on 11/2. Students were happy and excited to be able to attend an in person field trip. We are playing to do another combined HS and MS trip in March to Hearst Castle, Elephant Seals and lunch at Hearst Beach.



On Friday, 10/28, our middle school students (and staff) participated in the annual Biography day. Students researched a person of choice from history and dressed/acted like them. They also presented their research using written paper, google slides or trifold, along with presenting to the whole group and/or one on one to visiting parents and families.

FPCS Administration and Center Reports



Our Middle School students attended "The Call of the Wild" one-man performance at the Cal Poly PAC on 11/15. This show was a culminating event for all the middle school ELA classes who read/studied the novel by Jack London.

On Monday, 12/5, four of our seniors presented their senior projects on campus to staff, family and fellow students. The projects varied from "How to become an Esthetician" to "Marine Biology: Microplastics in our Ocean" to "Opera singing as a career and how it is tied to STEM".

Overall students are buckling down to finish their 1st semester class. High School students are planning their 2nd semester classes, including what Cuesta classes they will be taking. Our seniors will be meeting with Cuesta Enrollment staff in January to start the process for the Cuesta Promise and get help with their Cuesta Scholarship Applications.

K-5 Home Study

Enrollment: 25

- K-5 SLO HS families traveled up to Monterey to join our field trip group. The families were able to enjoy a day at the Aquarium with their children!
- Students continue to enjoy their daily meetings with Ms. Rebecca and Mr. Semu, in addition to their art classes with Ms. Tina. Hopefully they will meet more FP families and students at the STEAM fair in Feb!
- Families learned more about how to effectively use iReady at the Parent Night presentation on 11/28. Thank you to Stephanie for setting this up!

FPCS Administration and Center Reports

FPCS Committees

ALL - RULER 12:30pm <i>Use this link to all together for RULER Team before starting</i>	Community Connections Eamon Franceen Rebecca Sarah P.	Curriculum K-5 Cassie Diana Kenny Susan Semu (<i>check-ins</i>)	Curriculum 6-8 Caren Stefanie Gina Shannon
Curriculum 9-12 Donna Gregg Mike Michael B. Elaine	Safety Plans & Policies Executive Director Michele	RULER Committee Carrie Dawn Kari Kelsey	Student Support Lisa Stiers Sydney Semu Sharie Lisa Simard

VI – B

Pay Date 12/29/2022

EARNINGS by Earnings Code		Income	Adjustments
No Gross Pay			1.00
Regular	145,520.69		

TOTAL 145,520.69 1.00

EARNINGS by Group		Income	Adjustments
Base Pay	140,973.32		
Miscellaneous	722.01-		1.00
Stipends	5,269.38		

TOTAL 145,520.69 1.00

EARNINGS		Person Type	Female Employees
Certificated	17	102,768.23	12
Classified	15	42,752.46	10

TOTAL 32 145,520.69 22 88,337.40

Vendor Summary for Pay Date 12/29/2022

Vendor Checks	1,591.44	5
Vendor Liabilities	96,696.15	25
	<u>98,287.59</u>	<u>30</u>

TAXES	Employee	Employer	Total	Subject Grosses
Federal Withholding	10,441.63		10,441.63	129,625.88
State Withholding	3,317.15		3,317.15	129,625.88
Social Security	2,811.74	2,811.74	5,623.48	45,350.81
Medicare	2,067.78	2,067.78	4,135.56	142,602.92
SUI	713.03		713.03	142,602.92
Workers' Comp		1,068.08	1,068.08	142,602.92
SUBTOTAL	18,638.30	6,660.63	25,298.93	

REDUCTIONS	Employee	Employer	Total	Subject Grosses
PERS	398.88	1,445.66	1,844.54	5,698.30
PERS / 62	3,729.84	11,828.34	15,558.18	46,623.30
STRS / 60	7,577.94	14,120.85	21,698.79	73,931.18
STRS / 62	1,270.38	2,377.72	3,648.10	12,448.70
Benefits	2,669.41	575.41	3,244.82	
Misc	248.36		248.36	
SUBTOTAL	15,894.81	30,347.98	46,242.79	

DEDUCTIONS	Employee	Employer	Total	Subject Grosses
Gam	240.00		240.00	
Benefits		14,388.88	14,388.88	
Misc	1,103.08		1,103.08	8.00
Summer Savings	10,601.08		10,601.08	64,205.96
Taxes	412.83		412.83	37,530.01
SUBTOTAL	12,356.99	14,388.88	26,745.87	

TOTALS 46,890.10 51,397.49 98,287.59

Cancel/Reissue for Process Date 12/29/2022

Reissued
Cancel Checks
Void ACH

Pay01a

Payroll Summary by Org

Pay Date 12/29/2022

BALANCING DATA

NET

Gross Earnings	98,630.59	Net Pay	95,048.87	30
District Liability	145,520.69	Deductions	3,581.72	2
	51,397.49	Contributions		
	196,918.18			
		Partial Net ACH		
		Negative Net		
		Check Holds		
		Zero Net		
		TOTAL	98,630.59	32

Checks Dated 12/01/2022 through 12/31/2022

Check Number	Check Date	Pay to the Order of	Fund-Object	Expensed Amount	Check Amount
01-719433	12/05/2022	Brown, Douglas C	01-4300		156.38
01-719434	12/05/2022	McCallister, Jennifer D	01-4300		41.33
01-719435	12/05/2022	ALD TELECOM	01-5910		16.27
01-719436	12/05/2022	Amazon Capital Services	01-4300		523.54
01-719437	12/05/2022	American Star Tours	01-5800		192.50
01-719438	12/05/2022	Cal-Coast Refrigeration, Inc.	13-5800		393.25
01-719439	12/05/2022	County Of Santa Barbara	13-5800		585.00
01-719440	12/05/2022	FAMILY PARTNERSHIP CHARTER	01-8096		38,509.00
01-719441	12/05/2022	Frontier Communications	01-5910		1,267.68
01-719442	12/05/2022	HOME DEPOT CREDIT SERVICES	01-4300		414.97
01-719443	12/05/2022	Insight Public Sector SLED	01-4400		3,505.62
01-719444	12/05/2022	Mission Linen Supply Inc.	01-4300		292.73
01-719445	12/05/2022	Nancy B Shafer, CPA	01-5800		8,027.50
01-719446	12/05/2022	O'Connor Pest Control	01-5800		85.00
01-719447	12/05/2022	Pacific Gas & Electric	01-5520		10.18
01-719448	12/05/2022	So California Pizza Co	13-4710		601.39
01-719449	12/05/2022	SoCalGas	01-5510		782.07
01-719450	12/05/2022	Trivium Charter School	01-8096		78,198.00
01-720585	12/12/2022	Dekorte, Holly J	01-4300		30.98
01-720586	12/12/2022	805 Dairy Distributing LLC	13-4710		720.00
01-720587	12/12/2022	American Star Tours	01-5800		25,578.00
01-720588	12/12/2022	Coast Networkx, Inc.	01-4300		50.00
01-720589	12/12/2022	Culligan San Paso	01-4300		238.34
01-720590	12/12/2022	Go To Communications, Inc.	01-5910		475.98
01-720591	12/12/2022	Gold Star Foods, Inc.	01-4300	289.15	
			13-4710	3,657.20	3,946.35
01-720592	12/12/2022	McGraw-Hill School Education	01-4100		583.14
01-720593	12/12/2022	Mission Linen Supply Inc.	01-4300		406.51
01-720594	12/12/2022	OnSolve, LLC	01-5800		497.34
01-720595	12/12/2022	Sisc III Insurance	67-5450		18,229.50
01-720596	12/12/2022	US OMNI & TSACG Compliance	01-4300		50.00
01-720597	12/12/2022	WM CORPORATE SERVICES, INC.	01-5570		920.95
01-721811	12/19/2022	Brown, Douglas C	01-4300		28.25
01-721812	12/19/2022	805 Dairy Distributing LLC	13-4710		140.00
01-721813	12/19/2022	Amazon Capital Services	01-4300	755.33	
			01-4400	160.55	915.88
01-721814	12/19/2022	Cal-Coast Refrigeration, Inc.	13-5800		240.88
01-721815	12/19/2022	Department Of Justice	01-5800		94.00
01-721816	12/19/2022	FAMILY PARTNERSHIP CHARTER	01-8096		38,509.00
01-721817	12/19/2022	Golden State Water Company	01-5530		274.11
01-721818	12/19/2022	IXL Learning	01-5800		2,638.00
01-721819	12/19/2022	Jordanos Food Service Division	13-4300	1,084.59	
			13-4710	12.09	1,096.68
01-721820	12/19/2022	Mission Linen Supply Inc.	01-4300		414.97
01-721821	12/19/2022	Pacific Gas & Electric	01-5520		450.56
01-721822	12/19/2022	School Specialty, LLC	01-4300		133.56

The preceding Checks have been issued in accordance with the District's Policy and authorization of the Board of Trustees. It is recommended that the preceding Checks be approved.

ESCAPE ONLINE
Page 1 of 2

Checks Dated 12/01/2022 through 12/31/2022

Check Number	Check Date	Pay to the Order of	Fund-Object	Expensed Amount	Check Amount
01-721823	12/19/2022	SoCalGas	01-5510		1,368.75
01-721824	12/19/2022	Staples	01-4300	1,185.58	
			13-4400	312.48	1,498.06
01-721825	12/19/2022	Trivium Charter School	01-8096		78,198.00
01-721826	12/19/2022	US Bank Corporate Payments	01-4300	370.09	
			01-4400	25.84	
			01-5570	30.40	
			01-5800	896.19	
			01-5919	10.37	1,332.89
01-721827	12/19/2022	Verizon Wireless	01-5910		191.45
01-721828	12/19/2022	XEROX FINANCIAL SERVICES	01-5630		604.44
Total Number of Checks			49		313,458.98

Fund Recap

Fund	Description	Check Count	Expensed Amount
01	General Fund	41	287,482.60
13	Cafeteria Spec Rev Fund	9	7,746.88
67	Self-Insurance Fund 1	1	18,229.50
Total Number of Checks		49	313,458.98
Less Unpaid Tax Liability			.00
Net (Check Amount)			313,458.98

The preceding Checks have been issued in accordance with the District's Policy and authorization of the Board of Trustees. It is recommended that the preceding Checks be approved.

ESCAPE **ONLINE**
Page 2 of 2

BLOCHMAN REVOLVING FUND
Expenses by Vendor Detail
December 2022

Type	Date	Num	Memo	Account	Clr	Split	Amount	Balance
TOTAL								
								0.00

VI – C

**CHARTER SCHOOL
INTERIM FINANCIAL REPORT - ALTERNATIVE FORM
First Interim Report Certification**

Charter School Name: Trivium Charter
(continued) _____
CDS #: 42691120124255
Charter Approving Entity: Blochman Union
County: Santa Barbara
Charter #: 1319
Fiscal Year: 2022/23

CERTIFICATION OF FINANCIAL CONDITION

- ☒ **POSITIVE CERTIFICATION**
As the Charter School Official, I certify that based upon current projections this charter will meet its financial obligations for the current fiscal year and subsequent two fiscal years.
- ☐ **QUALIFIED CERTIFICATION**
As the Charter School Official, I certify that based upon current projections this charter may not meet its financial obligations for the current fiscal year or two subsequent fiscal years.
- ☐ **NEGATIVE CERTIFICATION**
As the Charter School Official, I certify that based upon current projections this charter will be unable to meet its financial obligations for the remainder of the current fiscal year or for the subsequent fiscal year.

To the entity that approved the charter school:

(☒) 2022/23 CHARTER SCHOOL Second INTERIM FINANCIAL REPORT -- ALTERNATIVE FORM: This report has been approved, and is hereby filed by the charter school pursuant to *Education Code* Section 47604.33.

Signed: Trisha Vais
Charter School Official
(Original signature required)

Date: 12/1/2022

Print Name: Trisha Vais

Title: Executive Director

To the County Superintendent of Schools:

(☒) 2022/23 CHARTER SCHOOL Second INTERIM FINANCIAL REPORT -- ALTERNATIVE FORM: This report is hereby filed with the County Superintendent pursuant to *Education Code* Section 47604.33.

Signed: Doug Brown
Authorized Representative of
Charter Approving Entity
(Original signature required)

Date: 12-9-2022

Print Name: Doug Brown

Title: Superintendent

For additional information on the Second Interim Report, please contact:

For Approving Entity:

Nancy Shafer
Name
Interim Business Manager
Title
805-937-1148 x113
Phone
blochman@blochmanusd.org
E-mail

For Charter School:

Aaron Guibord
Name
CSMC - Consultant
Title
805-390-1813
Phone
aguibord@csmcj.com
E-mail

This report has been verified for mathematical accuracy by the County Superintendent of Schools, pursuant to *Education Code* Section 47604.33.

Date

**CHARTER SCHOOL
INTERIM FINANCIAL REPORT - ALTERNATIVE FORM
First Interim Report - Summary**

Charter School Name: Trivium Charter
(continued)
CDS #: 42691120124255
Charter Approving Entity: Blochman Union
County: Santa Barbara
Charter #: 1319
Fiscal Year: 2022/23

Description	Object Code	7/1 Adopted Budget (X)	Actuals thru 10/31 (Y)	1st Interim Budget (Z)	1st Interim vs. Adopted Budget Increase, (Decrease)	
					\$ Difference (Z) vs. (X)	% Change (Z) vs. (X)
A. REVENUES						
1. LCFF/Revenue Limit Sources						
State Aid - Current Year	8011	2,186,378.00	437,114.00	2,186,378.00	-	0.00%
Education Protection Account State Aid - Current Year	8012	857,342.00	212,607.00	857,342.00	-	0.00%
State Aid - Prior Years	8019	-	-	-	-	-
Transfers to Charter Schools Funding in Lieu of Property Taxes	8096	351,746.84	96,074.00	351,746.84	-	0.00%
Other LCFF Transfers	8091, 8097	-	-	-	-	-
Total, LCFF Sources		3,395,466.84	745,795.00	3,395,466.84	-	0.00%
2. Federal Revenues						
Every Student Succeeds Act (Title I-V)	8290	54,811.00	1,307.46	54,811.00	-	0.00%
Special Education - Federal	8181, 8182	40,332.60	-	40,332.60	-	0.00%
Child Nutrition - Federal	8220	-	-	-	-	-
Donated Food Commodities	8221	-	-	-	-	-
Other Federal Revenues	8110, 8260-8299	-	-	-	-	-
Total, Federal Revenues		95,143.60	1,307.46	95,143.60	-	0.00%
3. Other State Revenues						
Special Education - State	StateRevSE	264,581.86	73,146.00	264,581.86	-	0.00%
All Other State Revenues	StateRevAO	84,267.99	14,147.00	84,267.99	-	0.00%
Total, Other State Revenues		348,849.85	87,293.00	348,849.85	-	0.00%
4. Other Local Revenues						
All Other Local Revenues	LocalRevAO	-	1,044.22	-	-	-
Total, Local Revenues		-	1,044.22	-	-	-
5. TOTAL REVENUES		3,839,460.29	835,439.68	3,839,460.29	-	0.00%
B. EXPENDITURES						
1. Certificated Salaries						
Certificated Teachers' Salaries	1100	1,477,659.20	465,466.42	1,477,659.20	-	0.00%
Certificated Pupil Support Salaries	1200	134,193.24	40,029.00	134,193.24	-	0.00%
Certificated Supervisors' and Administrators' Salaries	1300	173,570.00	49,770.28	173,570.00	-	0.00%
Other Certificated Salaries	1900	-	516.51	-	-	-
Total, Certificated Salaries		1,785,422.44	555,782.21	1,785,422.44	-	0.00%
2. Non-certificated Salaries						
Non-certificated Instructional Aides' Salaries	2100	204,649.50	70,841.58	204,649.50	-	0.00%
Non-certificated Support Salaries	2200	-	2,736.73	-	-	-
Non-certificated Supervisors' and Administrators' Sal.	2300	139,706.00	49,307.97	139,706.00	-	0.00%
Clerical and Office Salaries	2400	107,562.40	39,141.30	107,562.40	-	0.00%
Other Non-certificated Salaries	2900	-	-	-	-	-
Total, Non-certificated Salaries		451,917.90	162,027.58	451,917.90	-	0.00%
3. Employee Benefits						
STRS	3101-3102	330,272.82	103,889.46	330,272.82	-	0.00%
PERS	3201-3202	-	-	-	-	-
OASDI / Medicare / Alternative	3301-3302	60,460.34	21,532.71	60,460.34	-	0.00%
Health and Welfare Benefits	3401-3402	155,995.13	75,187.06	155,995.13	-	0.00%
Unemployment Insurance	3501-3502	17,533.48	1,628.20	17,533.48	-	0.00%
Workers' Compensation Insurance	3601-3602	48,863.51	9,488.28	48,863.51	-	0.00%
OPEB, Allocated	3701-3702	-	-	-	-	-
OPEB, Active Employees	3751-3752	-	-	-	-	-
Other Employee Benefits	3901-3902	-	2,371.76	-	-	-
Total, Employee Benefits		613,125.28	214,097.47	613,125.28	-	0.00%

**CHARTER SCHOOL
INTERIM FINANCIAL REPORT - ALTERNATIVE FORM
First Interim Report - Summary**

Charter School Name: Trivium Charter
(continued)
CDS #: 42691120124255
Charter Approving Entity: Blochman Union
County: Santa Barbara
Charter #: 1319
Fiscal Year: 2022/23

					1st Interim vs. Adopted Budget Increase, (Decrease)	
Description	Object Code	7/1 Adopted Budget (X)	Actuals thru 10/31 (Y)	1st Interim Budget (Z)	\$ Difference (Z) vs. (X)	% Change (Z) vs. (X)
4. Books and Supplies						
Approved Textbooks and Core Curricula Materials	4100	98,286.33	70,133.20	98,286.33	-	0.00%
Books and Other Reference Materials	4200	1,724.32	1,583.31	1,724.32	-	0.00%
Materials and Supplies	4300	34,831.30	11,814.97	34,831.30	-	0.00%
Noncapitalized Equipment	4400	201,745.62	40,832.80	201,745.62	-	0.00%
Food	4700	2,414.05	1,464.07	2,414.05	-	0.00%
Total, Books and Supplies		339,001.62	125,828.35	339,001.62	-	0.00%
5. Services and Other Operating Expenditures						
Subagreements for Services	5100	-	-	-	-	
Travel and Conferences	5200	8,966.47	35,959.49	8,966.47	-	0.00%
Dues and Memberships	5300	8,276.74	4,626.80	8,276.74	-	0.00%
Insurance	5400	14,858.36	7,342.62	14,858.36	-	0.00%
Operations and Housekeeping Services	5500	2,414.05	976.61	2,414.05	-	0.00%
Rentals, Leases, Repairs, and Noncap. Improvements	5600	146,590.26	63,897.61	146,590.26	-	0.00%
Transfers of Direct Costs	5700-5799	-	-	-	-	
Professional/Consulting Services and Operating Expend.	5800	364,566.13	77,630.48	364,566.13	-	0.00%
Communications	5900	44,832.36	4,591.36	44,832.36	-	0.00%
Total, Services and Other Operating Expenditures		590,504.37	195,024.97	590,504.37	-	0.00%
6. Capital Outlay (Objects 6100-6170, 6200-6500 modified accrual basis only)						
Land and Land Improvements	6100-6170	-	-	-	-	
Buildings and Improvements of Buildings	6200	-	-	-	-	
Books and Media for New School Libraries or Major Expansion of School Libraries	6300	-	-	-	-	
Equipment	6400	-	-	-	-	
Equipment Replacement	6500	-	-	-	-	
Depreciation Expense (for accrual basis only)	6900	3,755.92	-	3,755.92	-	0.00%
Total, Capital Outlay		3,755.92	-	3,755.92	-	0.00%
7. Other Outgo						
Tuition to Other Schools	7110-7143	-	-	-	-	
Transfers of Pass-through Revenues to Other LEAs	7211-7213	-	-	-	-	
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE	-	-	-	-	
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO	-	-	-	-	
All Other Transfers	7281-7299	-	-	-	-	
Transfers of Indirect Costs	7300-7399	-	-	-	-	
Debt Service:						
Interest	7438	-	-	-	-	
Principal (for modified accrual basis only)	7439	-	-	-	-	
Total, Other Outgo		-	-	-	-	
8. TOTAL EXPENDITURES		3,783,727.53	1,252,760.58	3,783,727.53	-	0.00%
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPEND. BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)		55,732.76	(417,320.90)	55,732.76	-	0.00%

**CHARTER SCHOOL
INTERIM FINANCIAL REPORT - ALTERNATIVE FORM
First Interim Report - Summary**

Charter School Name: Trivium Charter
(continued)
CDS #: 42691120124255
Charter Approving Entity: Blochman Union
County: Santa Barbara
Charter #: 1319
Fiscal Year: 2022/23

					1st Interim vs. Adopted Budget Increase, (Decrease)	
Description	Object Code	7/1 Adopted Budget (X)	Actuals thru 10/31 (Y)	1st Interim Budget (Z)	\$ Difference (Z) vs. (X)	% Change (Z) vs. (X)
D. OTHER FINANCING SOURCES / USES						
1. Other Sources	8930-8979	-	-	-	-	
2. Less: Other Uses	7630-7699	-	-	-	-	
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999	-	-	-	-	
4. TOTAL OTHER FINANCING SOURCES / USES		-	-	-	-	
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)		55,732.76	(417,320.90)	55,732.76	-	0.00%
F. FUND BALANCE, RESERVES						
1. Beginning Fund Balance						
a. As of July 1	9791	145,259.97	145,259.97	145,259.97	-	0.00%
b. Adjustments/Restatements	9793, 9795	0.63	0.63	0.63	-	0.00%
c. Adjusted Beginning Fund Balance		145,260.60	145,260.60	145,260.60		
2. Ending Fund Balance, June 30 (E + F.1.c.)		200,993.36	(272,060.30)	200,993.36		
Components of Ending Fund Balance :						
a. Nonspendable						
Revolving Cash (equals object 9130)	9711	-	-	-	-	
Stores (equals object 9320)	9712	-	-	-	-	
Prepaid Expenditures (equals object 9330)	9713	-	-	-	-	
All Others	9719	-	-	-	-	
b. Restricted	9740	-	-	-	-	
c. Committed						
Stabilization Arrangements	9750	-	-	-	-	
Other Commitments	9760	-	-	-	-	
d. Assigned						
Other Assignments	9780	-	-	-	-	
e. Unassigned/Unappropriated						
Reserve for Economic Uncertainties	9789	-	-	-	-	
Unassigned/Unappropriated Amount	9790	200,993.36	(272,060.30)	200,993.36	-	0.00%

**CHARTER SCHOOL
INTERIM FINANCIAL REPORT - ALTERNATIVE FORM
First Interim Report Certification**

Charter School Name: Trivium Adventure
(continued) _____
CDS #: 42691120137877
Charter Approving Entity: Blochman Union
County: Santa Barbara
Charter #: 1994
Fiscal Year: 2022/23

CERTIFICATION OF FINANCIAL CONDITION

- ☒ **POSITIVE CERTIFICATION**
As the Charter School Official, I certify that based upon current projections this charter will meet its financial obligations for the current fiscal year and subsequent two fiscal years.
- ☐ **QUALIFIED CERTIFICATION**
As the Charter School Official, I certify that based upon current projections this charter may not meet its financial obligations for the current fiscal year or two subsequent fiscal years.
- ☐ **NEGATIVE CERTIFICATION**
As the Charter School Official, I certify that based upon current projections this charter will be unable to meet its financial obligations for the remainder of the current fiscal year or for the subsequent fiscal year.

To the entity that approved the charter school:
(☒) 2022/23 CHARTER SCHOOL SECOND INTERIM FINANCIAL REPORT -- ALTERNATIVE FORM: This report has been approved, and is hereby filed by the charter school pursuant to *Education Code* Section 47604.33.

Signed: Trisha Vais
Charter School Official
(Original signature required)

Date: 12/1/2022

Print
Name: Trisha Vais

Title: Executive Director

To the County Superintendent of Schools:
(☒) 2022/23 CHARTER SCHOOL SECOND INTERIM FINANCIAL REPORT -- ALTERNATIVE FORM: This report is hereby filed with the County Superintendent pursuant to *Education Code* Section 47604.33.

Signed: Doug Brown
Authorized Representative of
Charter Approving Entity
(Original signature required)

Date: 12-9-2022

Print
Name: Doug Brown

Title: Superintendent

For additional information on the First Interim Report, please contact:

For Approving Entity:

Nancy Shafer
Name
Interim Business Manager
Title
805-937-1148 x113
Phone
blochman@blochmanusd.org
E-mail

For Charter School:

Aaron Guibord
Name
CSMC - Consultant
Title
805-390-1813
Phone
aguibord@csmcj.com
E-mail

This report has been verified for mathematical accuracy by the County Superintendent of Schools, pursuant to *Education Code* Section 47604.33.

Date

**CHARTER SCHOOL
INTERIM FINANCIAL REPORT - ALTERNATIVE FORM
First Interim Report - Summary**

Charter School Name: Trivium Adventure
(continued)
CDS #: 42691120137877
Charter Approving Entity: Blochman Union
County: Santa Barbara
Charter #: 1994
Fiscal Year: 2022/23

					1st Interim vs. Adopted Budget Increase, (Decrease)	
Description	Object Code	7/1 Adopted Budget (X)	Actuals thru 10/31 (Y)	1st Interim Budget (Z)	\$ Difference (Z) vs. (X)	% Change (Z) vs. (X)
A. REVENUES						
1. LCFF/Revenue Limit Sources						
State Aid - Current Year	8011	2,708,497.00	553,306.00	2,708,497.00	-	0.00%
Education Protection Account State Aid - Current Year	8012	60,786.00	10,837.00	60,786.00	-	0.00%
State Aid - Prior Years	8019	-	-	-	-	-
Transfers to Charter Schools Funding in Lieu of Property Taxes	8096	321,387.74	66,781.00	321,387.74	-	0.00%
Other LCFF Transfers	8091, 8097	-	-	-	-	-
Total, LCFF Sources		3,090,670.74	630,924.00	3,090,670.74	-	0.00%
2. Federal Revenues						
Every Student Succeeds Act (Title I-V)	8290	23,074.00	-	23,074.00	-	0.00%
Special Education - Federal	8181, 8182	36,851.51	-	36,851.51	-	0.00%
Child Nutrition - Federal	8220	-	-	-	-	-
Donated Food Commodities	8221	-	-	-	-	-
Other Federal Revenues	8110, 8260-8299	-	-	-	-	-
Total, Federal Revenues		59,925.51	-	59,925.51	-	0.00%
3. Other State Revenues						
Special Education - State	StateRevSE	241,745.92	50,413.00	241,745.92	-	0.00%
All Other State Revenues	StateRevAO	77,041.91	10,654.00	77,041.91	-	0.00%
Total, Other State Revenues		318,787.83	61,067.00	318,787.83	-	0.00%
4. Other Local Revenues						
All Other Local Revenues	LocalRevAO	-	860.22	-	-	-
Total, Local Revenues		-	860.22	-	-	-
5. TOTAL REVENUES						
		3,469,384.08	692,851.22	3,469,384.08	-	0.00%
B. EXPENDITURES						
1. Certificated Salaries						
Certificated Teachers' Salaries	1100	1,275,955.30	325,413.59	1,275,955.30	-	0.00%
Certificated Pupil Support Salaries	1200	122,352.66	32,763.79	122,352.66	-	0.00%
Certificated Supervisors' and Administrators' Salaries	1300	158,255.00	41,961.37	158,255.00	-	0.00%
Other Certificated Salaries	1900	-	470.94	-	-	-
Total, Certificated Salaries		1,556,562.96	400,609.69	1,556,562.96	-	0.00%
2. Non-certificated Salaries						
Non-certificated Instructional Aides' Salaries	2100	191,786.75	62,375.27	191,786.75	-	0.00%
Non-certificated Support Salaries	2200	-	119.33	-	-	-
Non-certificated Supervisors' and Administrators' Sal.	2300	127,379.00	41,089.98	127,379.00	-	0.00%
Clerical and Office Salaries	2400	98,071.60	32,534.12	98,071.60	-	0.00%
Other Non-certificated Salaries	2900	-	-	-	-	-
Total, Non-certificated Salaries		417,237.35	136,118.70	417,237.35	-	0.00%
3. Employee Benefits						
STRS	3101-3102	287,255.76	75,004.76	287,255.76	-	0.00%
PERS	3201-3202	-	-	-	-	-
OASDI / Medicare / Alternative	3301-3302	54,488.82	17,633.82	54,488.82	-	0.00%
Health and Welfare Benefits	3401-3402	140,395.49	65,184.03	140,395.49	-	0.00%
Unemployment Insurance	3501-3502	16,017.12	1,786.27	16,017.12	-	0.00%
Workers' Compensation Insurance	3601-3602	43,107.79	7,645.30	43,107.79	-	0.00%
OPEB, Allocated	3701-3702	-	-	-	-	-
OPEB, Active Employees	3751-3752	-	-	-	-	-
Other Employee Benefits	3901-3902	-	1,969.87	-	-	-
Total, Employee Benefits		541,264.98	169,224.05	541,264.98	-	0.00%

**CHARTER SCHOOL
INTERIM FINANCIAL REPORT - ALTERNATIVE FORM
First Interim Report - Summary**

Charter School Name: Trivium Adventure
(continued)
CDS #: 42691120137877
Charter Approving Entity: Blochman Union
County: Santa Barbara
Charter #: 1994
Fiscal Year: 2022/23

					1st Interim vs. Adopted Budget Increase, (Decrease)	
Description	Object Code	7/1 Adopted Budget (X)	Actuals thru 10/31 (Y)	1st Interim Budget (Z)	\$ Difference (Z) vs. (X)	% Change (Z) vs. (X)
4. Books and Supplies						
Approved Textbooks and Core Curricula Materials	4100	88,812.75	50,323.22	88,812.75	-	0.00%
Books and Other Reference Materials	4200	1,558.12	685.71	1,558.12	-	0.00%
Materials and Supplies	4300	31,473.99	9,138.04	31,473.99	-	0.00%
Noncapitalized Equipment	4400	222,299.85	36,476.06	222,299.85	-	0.00%
Food	4700	2,181.37	1,894.51	2,181.37	-	0.00%
Total, Books and Supplies		346,326.08	98,517.54	346,326.08	-	0.00%
5. Services and Other Operating Expenditures						
Subagreements for Services	5100	-	-	-	-	
Travel and Conferences	5200	8,102.22	25,941.58	8,102.22	-	0.00%
Dues and Memberships	5300	7,478.97	3,868.20	7,478.97	-	0.00%
Insurance	5400	13,426.20	5,970.03	13,426.20	-	0.00%
Operations and Housekeeping Services	5500	2,181.37	520.65	2,181.37	-	0.00%
Rentals, Leases, Repairs, and Noncap. Improvements	5600	113,282.66	46,621.32	113,282.66	-	0.00%
Transfers of Direct Costs	5700-5799	-	-	-	-	
Professional/Consulting Services and Operating Expend.	5800	330,101.02	53,751.53	330,101.02	-	0.00%
Communications	5900	40,511.08	10,469.63	40,511.08	-	0.00%
Total, Services and Other Operating Expenditures		515,083.52	147,142.94	515,083.52	-	0.00%
6. Capital Outlay (Objects 6100-6170, 6200-6500 modified accrual basis only)						
Land and Land Improvements	6100-6170	-	-	-	-	
Buildings and Improvements of Buildings	6200	-	-	-	-	
Books and Media for New School Libraries or Major Expansion of School Libraries	6300	-	-	-	-	
Equipment	6400	-	-	-	-	
Equipment Replacement	6500	-	-	-	-	
Depreciation Expense (for accrual basis only)	6900	3,393.89	-	3,393.89	-	0.00%
Total, Capital Outlay		3,393.89	-	3,393.89	-	0.00%
7. Other Outgo						
Tuition to Other Schools	7110-7143	-	-	-	-	
Transfers of Pass-through Revenues to Other LEAs	7211-7213	-	-	-	-	
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE	-	-	-	-	
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO	-	-	-	-	
All Other Transfers	7281-7299	-	-	-	-	
Transfers of Indirect Costs	7300-7399	-	-	-	-	
Debt Service:						
Interest	7438	-	-	-	-	
Principal (for modified accrual basis only)	7439	-	-	-	-	
Total, Other Outgo		-	-	-	-	
8. TOTAL EXPENDITURES		3,379,868.78	951,612.92	3,379,868.78	-	0.00%
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPEND. BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)		89,515.30	(258,761.70)	89,515.30	-	0.00%

**CHARTER SCHOOL
INTERIM FINANCIAL REPORT - ALTERNATIVE FORM
First Interim Report - Summary**

Charter School Name: Trivium Adventure
(continued)
CDS #: 42691120137877
Charter Approving Entity: Blochman Union
County: Santa Barbara
Charter #: 1994
Fiscal Year: 2022/23

					1st Interim vs. Adopted Budget Increase, (Decrease)	
Description	Object Code	7/1 Adopted Budget (X)	Actuals thru 10/31 (Y)	1st Interim Budget (Z)	\$ Difference (Z) vs. (X)	% Change (Z) vs. (X)
D. OTHER FINANCING SOURCES / USES						
1. Other Sources	8930-8979	-	-	-	-	
2. Less: Other Uses	7630-7699	-	-	-	-	
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999	-	-	-	-	
4. TOTAL OTHER FINANCING SOURCES / USES		-	-	-	-	
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)		89,515.30	(258,761.70)	89,515.30	-	0.00%
F. FUND BALANCE, RESERVES						
1. Beginning Fund Balance						
a. As of July 1	9791	100,676.65	100,676.65	100,676.65	-	0.00%
b. Adjustments/Restatements	9793, 9795	0.35	0.35	0.35	-	0.00%
c. Adjusted Beginning Fund Balance		100,677.00	100,677.00	100,677.00		
2. Ending Fund Balance, June 30 (E + F.1.c.)		190,192.30	(158,084.70)	190,192.30		
Components of Ending Fund Balance :						
a. Nonspendable						
Revolving Cash (equals object 9130)	9711	-	-	-	-	
Stores (equals object 9320)	9712	-	-	-	-	
Prepaid Expenditures (equals object 9330)	9713	-	-	-	-	
All Others	9719	-	-	-	-	
b. Restricted	9740	-	-	-	-	
c. Committed						
Stabilization Arrangements	9750	-	-	-	-	
Other Commitments	9760	-	-	-	-	
d. Assigned						
Other Assignments	9780	-	-	-	-	
e. Unassigned/Unappropriated						
Reserve for Economic Uncertainties	9789	-	-	-	-	
Unassigned/Unappropriated Amount	9790	190,192.30	(158,084.70)	190,192.30	-	0.00%

**CHARTER SCHOOL
INTERIM FINANCIAL REPORT - ALTERNATIVE FORM
Second Interim Report Certification**

Charter School Name: Trivium Voyage
(continued) _____
CDS #: 42691120137885
Charter Approving Entity: Blochman Union
County: Santa Barbara
Charter #: 1995
Fiscal Year: 2022/23

CERTIFICATION OF FINANCIAL CONDITION

- ☒ **POSITIVE CERTIFICATION**
As the Charter School Official, I certify that based upon current projections this charter will meet its financial obligations for the current fiscal year and subsequent two fiscal years.
- ☐ **QUALIFIED CERTIFICATION**
As the Charter School Official, I certify that based upon current projections this charter may not meet its financial obligations for the current fiscal year or two subsequent fiscal years.
- ☐ **NEGATIVE CERTIFICATION**
As the Charter School Official, I certify that based upon current projections this charter will be unable to meet its financial obligations for the remainder of the current fiscal year or for the subsequent fiscal year.

To the entity that approved the charter school:

(☒) 2022/23 CHARTER SCHOOL SECOND INTERIM FINANCIAL REPORT -- ALTERNATIVE FORM: This report has been approved, and is hereby filed by the charter school pursuant to *Education Code* Section 47604.33.

Signed: Trisha Vais
Charter School Official
(Original signature required)

Date: 12/1/2022

Print

Name: Trisha Vais

Title: Executive Director

To the County Superintendent of Schools:

(☒) 2022/23 CHARTER SCHOOL SECOND INTERIM FINANCIAL REPORT -- ALTERNATIVE FORM: This report is hereby filed with the County Superintendent pursuant to *Education Code* Section 47604.33.

Signed: Doug Brown
Authorized Representative of
Charter Approving Entity
(Original signature required)

Date: 12-9-2022

Print

Name: Doug Brown

Title: Superintendent

For additional information on the Second Interim Report, please contact:

For Approving Entity:

Nancy Schafer
Name
Interim Business Manager
Title
805-937-1148 x113
Phone
blochman@blochmanusd.org
E-mail

For Charter School:

Aaron Guibord
Name
CSMC - Consultant
Title
805-390-1813
Phone
aguibord@csmc.com
E-mail

This report has been verified for mathematical accuracy by the County Superintendent of Schools, pursuant to *Education Code* Section 47604.33.

Date

**CHARTER SCHOOL
INTERIM FINANCIAL REPORT - ALTERNATIVE FORM
First Interim Report - Summary**

Charter School Name: Trivium Voyage
(continued)
CDS #: 42691120137885
Charter Approving Entity: Blochman Union
County: Santa Barbara
Charter #: 1995
Fiscal Year: 2022/23

Description	Object Code	7/1 Adopted Budget (X)	Actuals thru 10/31 (Y)	1st Interim Budget (Z)	1st Interim vs. Adopted Budget Increase, (Decrease)	
					\$ Difference (Z) vs. (X)	% Change (Z) vs. (X)
A. REVENUES						
1. LCFF/Revenue Limit Sources						
State Aid - Current Year	8011	2,978,403.00	755,956.00	2,978,403.00	-	0.00%
Education Protection Account State Aid - Current Year	8012	67,716.00	14,814.00	67,716.00	-	0.00%
State Aid - Prior Years	8019	-	-	-	-	-
Transfers to Charter Schools Funding in Lieu of Property Taxes	8096	358,028.04	91,289.00	358,028.04	-	0.00%
Other LCFF Transfers	8091, 8097	-	-	-	-	-
Total, LCFF Sources		3,404,147.04	862,059.00	3,404,147.04	-	0.00%
2. Federal Revenues						
Every Student Succeeds Act (Title I-V)	8290	24,360.00	-	24,360.00	-	0.00%
Special Education - Federal	8181, 8182	41,052.83	-	41,052.83	-	0.00%
Child Nutrition - Federal	8220	-	-	-	-	-
Donated Food Commodities	8221	-	-	-	-	-
Other Federal Revenues	8110, 8260-8299	-	-	-	-	-
Total, Federal Revenues		65,412.83	-	65,412.83	-	0.00%
3. Other State Revenues						
Special Education - State	StateRevSE	269,306.53	69,515.00	269,306.53	-	0.00%
All Other State Revenues	StateRevAO	85,538.38	11,752.00	85,538.38	-	0.00%
Total, Other State Revenues		354,844.91	81,267.00	354,844.91	-	0.00%
4. Other Local Revenues						
All Other Local Revenues	LocalRevAO	-	983.38	-	-	-
Total, Local Revenues		-	983.38	-	-	-
5. TOTAL REVENUES		3,824,404.78	944,309.38	3,824,404.78	-	0.00%
B. EXPENDITURES						
1. Certificated Salaries						
Certificated Teachers' Salaries	1100	1,478,345.50	478,057.98	1,478,345.50	-	0.00%
Certificated Pupil Support Salaries	1200	138,140.10	37,162.00	138,140.10	-	0.00%
Certificated Supervisors' and Administrators' Salaries	1300	178,675.00	47,531.94	178,675.00	-	0.00%
Other Certificated Salaries	1900	-	531.70	-	-	-
Total, Certificated Salaries		1,795,160.60	563,283.62	1,795,160.60	-	0.00%
2. Non-certificated Salaries						
Non-certificated Instructional Aides' Salaries	2100	206,818.75	68,503.31	206,818.75	-	0.00%
Non-certificated Support Salaries	2200	-	399.20	-	-	-
Non-certificated Supervisors' and Administrators' Sal.	2300	143,815.00	46,568.64	143,815.00	-	0.00%
Clerical and Office Salaries	2400	110,726.00	36,876.17	110,726.00	-	0.00%
Other Non-certificated Salaries	2900	-	-	-	-	-
Total, Non-certificated Salaries		461,359.75	152,347.32	461,359.75	-	0.00%
3. Employee Benefits						
STRS	3101-3102	332,856.10	105,875.27	332,856.10	-	0.00%
PERS	3201-3202	-	-	-	-	-
OASDI / Medicare / Alternative	3301-3302	61,323.85	20,043.37	61,323.85	-	0.00%
Health and Welfare Benefits	3401-3402	156,879.40	81,647.33	156,879.40	-	0.00%
Unemployment Insurance	3501-3502	17,751.40	1,238.62	17,751.40	-	0.00%
Workers' Compensation Insurance	3601-3602	49,282.41	10,045.38	49,282.41	-	0.00%
OPEB, Allocated	3701-3702	-	-	-	-	-
OPEB, Active Employees	3751-3752	-	-	-	-	-
Other Employee Benefits	3901-3902	-	2,453.86	-	-	-
Total, Employee Benefits		618,093.16	221,303.83	618,093.16	-	0.00%

**CHARTER SCHOOL
INTERIM FINANCIAL REPORT - ALTERNATIVE FORM
First Interim Report - Summary**

Charter School Name: Trivium Voyage
(continued)
CDS #: 42691120137885
Charter Approving Entity: Blochman Union
County: Santa Barbara
Charter #: 1995
Fiscal Year: 2022/23

					1st Interim vs. Adopted Budget Increase, (Decrease)	
Description	Object Code	7/1 Adopted Budget (X)	Actuals thru 10/31 (Y)	1st Interim Budget (Z)	\$ Difference (Z) vs. (X)	% Change (Z) vs. (X)
4. Books and Supplies						
Approved Textbooks and Core Curricula Materials	4100	97,900.92	64,654.57	97,900.92	-	0.00%
Books and Other Reference Materials	4200	1,717.56	1,348.34	1,717.56	-	0.00%
Materials and Supplies	4300	34,694.71	12,708.05	34,694.71	-	0.00%
Noncapitalized Equipment	4400	200,954.52	39,741.97	200,954.52	-	0.00%
Food	4700	2,404.58	1,670.90	2,404.58	-	0.00%
Total, Books and Supplies		337,672.29	120,123.83	337,672.29	-	0.00%
5. Services and Other Operating Expenditures						
Subagreements for Services	5100	-	-	-	-	
Travel and Conferences	5200	8,931.31	33,121.49	8,931.31	-	0.00%
Dues and Memberships	5300	8,244.29	4,355.00	8,244.29	-	0.00%
Insurance	5400	14,800.09	7,090.35	14,800.09	-	0.00%
Operations and Housekeeping Services	5500	2,404.58	973.75	2,404.58	-	0.00%
Rentals, Leases, Repairs, and Noncap. Improvements	5600	119,802.48	49,397.09	119,802.48	-	0.00%
Transfers of Direct Costs	5700-5799	-	-	-	-	
Professional/Consulting Services and Operating Expend.	5800	363,796.38	64,964.61	363,796.38	-	0.00%
Communications	5900	44,656.60	5,679.33	44,656.60	-	0.00%
Total, Services and Other Operating Expenditures		562,635.73	165,581.62	562,635.73	-	0.00%
6. Capital Outlay (Objects 6100-6170, 6200-6500 modified accrual basis only)						
Land and Land Improvements	6100-6170	-	-	-	-	
Buildings and Improvements of Buildings	6200	-	-	-	-	
Books and Media for New School Libraries or Major Expansion of School Libraries	6300	-	-	-	-	
Equipment	6400	-	-	-	-	
Equipment Replacement	6500	-	-	-	-	
Depreciation Expense (for accrual basis only)	6900	3,741.19	-	3,741.19	-	0.00%
Total, Capital Outlay		3,741.19	-	3,741.19	-	0.00%
7. Other Outgo						
Tuition to Other Schools	7110-7143	-	-	-	-	
Transfers of Pass-through Revenues to Other LEAs	7211-7213	-	-	-	-	
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE	-	-	-	-	
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO	-	-	-	-	
All Other Transfers	7281-7299	-	-	-	-	
Transfers of Indirect Costs	7300-7399	-	-	-	-	
Debt Service:						
Interest	7438	-	-	-	-	
Principal (for modified accrual basis only)	7439	-	-	-	-	
Total, Other Outgo		-	-	-	-	
8. TOTAL EXPENDITURES		3,778,662.72	1,222,640.22	3,778,662.72	-	0.00%
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPEND. BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)		45,742.06	(278,330.84)	45,742.06	-	0.00%

**CHARTER SCHOOL
INTERIM FINANCIAL REPORT - ALTERNATIVE FORM
First Interim Report - Summary**

Charter School Name: Trivium Voyage
(continued)
CDS #: 42691120137885
Charter Approving Entity: Blochman Union
County: Santa Barbara
Charter #: 1995
Fiscal Year: 2022/23

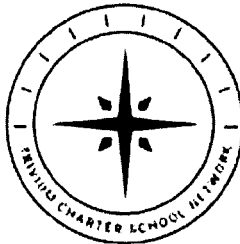
					1st Interim vs. Adopted Budget Increase, (Decrease)	
Description	Object Code	7/1 Adopted Budget (X)	Actuals thru 10/31 (Y)	1st Interim Budget (Z)	\$ Difference (Z) vs. (X)	% Change (Z) vs. (X)
D. OTHER FINANCING SOURCES / USES						
1. Other Sources	8930-8979	-	-	-	-	
2. Less: Other Uses	7630-7699	-	-	-	-	
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999	-	-	-	-	
4. TOTAL OTHER FINANCING SOURCES / USES		-	-	-	-	
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)		45,742.06	(278,330.84)	45,742.06	-	0.00%
F. FUND BALANCE, RESERVES						
1. Beginning Fund Balance						
a. As of July 1	9791	137,330.18	137,330.18	137,330.18	-	0.00%
b. Adjustments/Restatements	9793, 9795	0.27	0.27	0.27	-	0.00%
c. Adjusted Beginning Fund Balance		137,330.45	137,330.45	137,330.45		
2. Ending Fund Balance, June 30 (E + F.1.c.)		183,072.51	(141,000.39)	183,072.51		
Components of Ending Fund Balance :						
a. Nonspendable						
Revolving Cash (equals object 9130)	9711	-	-	-	-	
Stores (equals object 9320)	9712	-	-	-	-	
Prepaid Expenditures (equals object 9330)	9713	-	-	-	-	
All Others	9719	-	-	-	-	
b. Restricted	9740	-	-	-	-	
c. Committed						
Stabilization Arrangements	9750	-	-	-	-	
Other Commitments	9760	-	-	-	-	
d. Assigned						
Other Assignments	9780	-	-	-	-	
e. Unassigned/Unappropriated						
Reserve for Economic Uncertainties	9789	-	-	-	-	
Unassigned/Unappropriated Amount	9790	183,072.51	(141,000.39)	183,072.51	-	0.00%

Financial Statements

June 30, 2022

The Trivium Academy of Classical Education

(Operating Trivium Charter School #1319,
Trivium Charter School: Voyage #1995, and
Trivium Charter School: Adventure #1994)



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CPAs & BUSINESS ADVISORS

Independent Auditor's Report

Governing Board
The Trivium Academy of Classical Education
Santa Maria, California

Report on the Financial Statements

Opinion

We have audited the financial statements of The Trivium Academy of Classical Education (the Organization) (a California Nonprofit Public Benefit Corporation), which comprise the statement of financial position as of June 30, 2022, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

In our opinion, the accompanying financial statements referred to above present fairly, in all material respects, the financial position of the Organization as of June 30, 2022, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audit in accordance with auditing standards generally accepted in the United States of America (GAAS) and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States (*Government Auditing Standards*). Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the Organization and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America; and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Organization's ability to continue as a going concern for one year after the date that the financial statements are available to be issued.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS and *Government Auditing Standards* will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with GAAS and *Government Auditing Standards*, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Organization's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Organization's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

Supplementary Information

Our audit was conducted for the purpose of forming an opinion on the financial statements as a whole. The accompanying supplementary information such as the schedule of expenditures of federal awards, as required by Title 2 U.S. Code of Federal Regulations (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* and other supplementary information on pages 16-28 are presented for purposes of additional analysis and are not a required part of the financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the schedule of expenditures of federal awards and other supplementary information is fairly stated in all material respects in relation to the financial statements as a whole.

Other Reporting Required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated November 29, 2022 on our consideration of the Organization's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts and grant agreements, and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the Organization's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Organization's internal control over financial reporting and compliance.

A handwritten signature in black ink that reads "Eide Bailly LLP". The signature is written in a cursive, flowing style.

Rancho Cucamonga, California
November 29, 2022

The Trivium Academy of Classical Education
Statement of Financial Position
June 30, 2022

Assets		
Current assets		
Cash and cash equivalents	\$	2,140,423
Receivables		935,505
Prepaid expenses		144,454
		<u>3,220,382</u>
Total current assets		
Non-current assets		
Security deposits		4,100
Property and equipment, net		6,442
		<u>10,542</u>
Total non-current assets		
Total assets	\$	<u><u>3,230,924</u></u>
Liabilities		
Current liabilities		
Accounts payable	\$	808,500
Accrued liabilities		399,054
Accrued compensated absences		172,149
Note payable		305,600
Refundable advance		343,736
		<u>2,029,039</u>
Total liabilities		
Net Assets		
Without donor restrictions		<u>1,201,885</u>
Total liabilities and net assets	\$	<u><u>3,230,924</u></u>

The Trivium Academy of Classical Education

Statement of Activities
Year Ended June 30, 2022

Support and Revenues	
Local Control Funding Formula	\$ 7,665,361
Federal revenue	1,255,931
Other state revenue	1,479,282
Local revenues	339
Interest income	4,166
Fundraising revenue	<u>66</u>
Total support and revenues	<u>10,405,145</u>
Expenses	
Program services	8,755,437
Management and general	1,842,220
Fundraising and development	<u>260</u>
Total expenses	<u>10,597,917</u>
Change in Net Assets	(192,772)
Net Assets, Beginning of Year	<u>1,394,657</u>
Net Assets, End of Year	<u><u>\$ 1,201,885</u></u>

The Trivium Academy of Classical Education

Statement of Functional Expenses

Year Ended June 30, 2022

	Program Services	Management and General	Fundraising and Development	Total Expenses
Salaries	\$ 4,801,564	\$ 1,008,824	\$ -	\$ 5,810,388
Employee benefits	1,192,760	91,675	-	1,284,435
Payroll taxes	583,115	62,877	-	645,992
Fees for services	423,503	441,225	-	864,728
Advertising and promotions	4,073	860	-	4,933
Office expenses	105,309	22,377	-	127,686
Information technology	275,751	33,887	-	309,638
Occupancy	281,922	59,844	-	341,766
Conferences and meeting	27,077	5,600	-	32,677
Interest	-	130	-	130
Depreciation	5,755	1,267	-	7,022
Insurance	33,827	7,152	-	40,979
Other expenses	26,812	5,637	260	32,709
Capital outlay	19,286	4,158	-	23,444
Instructional materials	792,346	58,094	-	850,440
Nutrition	7,404	1,554	-	8,958
District oversight fees	174,933	37,059	-	211,992
Total functional expenses	<u>\$ 8,755,437</u>	<u>\$ 1,842,220</u>	<u>\$ 260</u>	<u>\$ 10,597,917</u>

The Trivium Academy of Classical Education

Statement of Cash Flows

Year Ended June 30, 2022

Operating Activities	
Change in net assets	\$ (192,772)
Adjustments to reconcile change in net assets to net cash from (used for) operating activities	
Depreciation expense	7,022
Changes in operating assets and liabilities	
Receivables	729,727
Prepaid expenses	(68,171)
Accounts payable	716,647
Accrued liabilities	205,222
Refundable advance	58,924
	<u>1,456,599</u>
Net Cash from (used for) Operating Activities	
Financing Activities	
Proceeds from issuance of notes	305,600
Principal payments on notes	(922,904)
	<u>(617,304)</u>
Net Cash from (used for) Financing Activities	
Net Change in Cash and Cash Equivalents	839,295
Cash and Cash Equivalents, Beginning of Year	<u>1,301,128</u>
Cash and Cash Equivalents, End of Year	<u><u>\$ 2,140,423</u></u>
Supplemental Cash Flow Disclosure	
Cash paid during the period in interest	<u><u>\$ 130</u></u>

Note 1 - Principal Activity and Significant Accounting Policies

Organization

The Trivium Academy of Classical Education (the Organization) was incorporated in the State of California in 2011 as a nonprofit public benefit corporation that is organized under the Nonprofit Public Benefit Corporation Law exclusively for charitable and educational purposes within the meaning of 501(c)(3) of the Internal Revenue Code of 1954. The Charter Schools were renewed by Blochman Union School District for five years ending in 2025.

Trivium Charter School

Charter school number authorized by the State: 1319

Trivium Charter School is located in Santa Maria, California at 1550 S. College Drive, that currently serves 319 students.

Trivium Charter School: Voyage

Charter school number authorized by the State: 1995

Trivium Charter School: Voyage is located in Goleta, California at 4597 Hollister Avenue, that currently serves 299 students.

Trivium Charter School: Adventure

Charter school number authorized by the State: 1994

Trivium Charter School: Adventure is located in Lompoc, California at 1600 Berkeley Drive, that currently serves 240 students.

The Academy also operates two Learning Centers, which serves all students in grades K-12:

- **Arroyo Grande Learning Center:** 207 Pilgrim Way, California
- **Atascadero Learning Center:** 9333 Santa Barbara Road, California

Trivium's Mission: "Is to offer the best combination of homeschooling, classroom experience and personalized learning. Trivium focuses on creating an engaging school experience whether your student is in the classroom or at home. Trivium wants your student(s) to enjoy learning while mastering foundational and critical thinking skills. This equips our students with the tools to be successful at whatever they choose to do in their future".

Basis of Accounting

The accompanying financial statements were prepared using the accrual basis of accounting in accordance with accounting principles generally accepted in the United States of America as applicable to nonprofit organizations. Revenues are recognized as discussed below, and expenditures are recognized in the accounting period in which the liability is incurred.

Net Assets

Net assets, revenues, gains, and losses are classified based on the existence or absence of donor or grantor restrictions. Accordingly, net assets and changes therein are classified and reported as follows:

Net Assets Without Donor Restrictions – Net assets available for use in general operations and not subject to donor restrictions. The Governing Board has designated, from net assets without donor restrictions, net assets for discretionary State grants.

Net Assets with Donor Restrictions – Net assets subject to donor (or certain grantor) restrictions. Some donor imposed (or grantor) restrictions are temporary in nature, such as those that will be met by the passage of time or other events specified by the donor. Other donor restrictions are perpetual in nature, where the donor stipulates that resources be maintained in perpetuity. The Organization did not have net assets with donor restrictions for the year ended June 30, 2022.

Cash and Cash Equivalents

The Organization considers all cash including cash in County Investment Pool and highly liquid financial instruments with original maturities of three months or less, and which are neither held for nor restricted by donors for long-term purposes, to be cash and cash equivalents.

Receivables and Credit Policies

Receivables consist primarily of noninterest-bearing amounts due for educational programs. Management determines the allowance for uncollectable receivables based on historical experience, an assessment of economic conditions, and a review of subsequent collections. Receivables are written off when deemed uncollectable. No allowance for doubtful accounts has been established, as the Organization deems all amounts to be fully collectible. Substantially all outstanding receivables as of June 30, 2022 are due from state and/or federal sources related to grant contributions and are expected to be collected within a period of less than one year.

Property and Equipment

Property and equipment additions over \$5,000 are recorded at cost, or if donated, at fair value on the date of donation. Depreciation is computed using the straight-line method over the estimated useful lives of the assets ranging from 3 to 30 years, or in the case of capitalized leased assets or leasehold improvements, the lesser of the useful life of the asset or the lease term. When assets are sold or otherwise disposed of, the cost and related depreciation are removed from the accounts, and any remaining gain or loss is included in the statement of activities. Cost of maintenance and repairs that do not improve or extend the useful lives of the respective assets are expensed currently.

The Organization reviews the carrying values of property and equipment for impairment whenever events or circumstances indicate that the carrying value of an asset may not be recoverable from the estimated future cash flows expected to result from its use and eventual disposition. When considered impaired, an impairment loss is recognized to the extent carrying value exceeds the fair value of the asset. There were no indicators of asset impairment during the year ended June 30, 2022.

Revenue and Revenue Recognition

Operating funds for the Organization are derived principally from state and federal sources. The Organization receives state funding based on each of the enrolled student's average daily attendance (ADA) in its school. Contributions are recognized when cash or notification of an entitlement is received.

A portion of the Organization's revenue is derived from cost-reimbursable federal and state contracts and grants, which are conditioned upon certain performance requirements and/or the incurrence of allowable qualifying expenses. Amounts received are recognized as revenue when the Organization has incurred expenditures in compliance with specific contract or grant provisions. Amounts received prior to incurring qualifying expenditures are reported as refundable advances in the statement of financial position. Consequently, at June 30, 2022, conditional contributions approximating \$581,794, for which no amounts had been received in advance, have not been recognized in the accompanying financial statements.

Donated Services and In-Kind Contributions

Volunteers contribute significant amounts of time to program services, administration, and fundraising and development activities; however, the financial statements do not reflect the value of these contributed services because they do not meet recognition criteria prescribed by generally accepted accounting principles. Contributed goods are recorded at fair value at the date of donation. Donated professional services are recorded at the respective fair values of the services received. No significant contributions of such goods or services were received during the year ended June 30, 2022.

Functional Allocation of Expenses

The financial statements report categories of expenses that are attributed to program service activities or supporting services activities such as management and general activities and fundraising and development activities. The costs of program and supporting services activities have been summarized on a functional basis in the statement of activities. The statement of functional expenses present the natural classification detail of expenses by function. Accordingly, certain costs have been allocated among the programs and supporting services benefited based on management's estimates. The expenses that are allocated include occupancy, which are allocated on a square footage basis, as well as salaries and wages, benefits, payroll and taxes, professional services, office expenses, information technology, insurance, and other, which are allocated on the basis of estimates of time and effort.

Income Taxes

The Organization is organized as a California nonprofit corporation and has been recognized by the Internal Revenue Service (IRS) as exempt from federal income taxes under Section 501(a) of the Internal Revenue Code as an organization described in Section 501(c)(3), and qualifies for the charitable contribution deduction. It is also exempt from State franchise and income taxes under Section 23701(d) of the California Revenue and Taxation Code. The Organization is annually required to file a Return of Organization Exempt from Income Tax (Form 990) with the IRS. In addition, the Organization is subject to income tax on net income that is derived from business activities that are unrelated to its exempt purpose. The Organization determined that it is not subject to unrelated business income tax and has not filed an Exempt Organization Business Income Tax Return (Form 990-T) with the IRS.

Management believes that the Organization has appropriate support for any tax positions taken affecting its annual filing requirements, and as such, does not have any uncertain tax positions that are material to the financial statements. The Organization would recognize future accrued interest and penalties related to unrecognized tax benefits and liabilities in income tax expense if such interest and penalties are incurred.

Estimates

The preparation of financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the reporting period. Accordingly, actual results could differ from those estimates.

Financial Instruments and Credit Risk

Deposit concentration risk is managed by placing cash, money market accounts, and certificates of deposit with financial institutions believed by management to be creditworthy. At times, amounts on deposit may exceed insured limits or include uninsured investments in money market mutual funds. To date, no losses have been experienced in any of these accounts. Credit risk associated with accounts receivable is considered to be limited due to high historical collection rates and because substantial portions of the outstanding amounts are due from governmental agencies supportive of the Organization's mission.

Recent Accounting Pronouncements

In February 2016, FASB issued Accounting Standards Update (ASU) 2016-02, *Leases*. ASU 2016-02 requires a lessee to recognize a lease asset representing its right to use the underlying asset for the lease term, and a lease liability for the payments to be made to lessor, on its statement of financial position for all operating leases greater than 12 months. Although the full impact of this update on the Organization's financial statements has not yet been determined, the future adoption of this guidance will require the Organization to record assets and liabilities on its statement of financial position relating to facility and other leases currently being accounted for as operating leases.

The ASU is effective for the Organization for the year ended June 30, 2023. Management is evaluating the impact of the adoption of this standard.

Note 2 - Liquidity and Availability

Financial assets available for general expenditure, that is, without donor or other restrictions limiting their use, within one year of the statement of financial position date, comprise the following:

Cash and cash equivalents	\$ 2,140,423
Receivables	<u>935,505</u>
Total	<u><u>\$ 3,075,928</u></u>

As part of the Organization's liquidity management, it has a policy to structure its financial assets to be available as its general expenditures, liabilities, and other obligations become due.

Note 3 - Property and Equipment

Property and equipment consist of the following at June 30, 2022:

Computer and equipment	<u>\$ 97,144</u>
Less accumulated depreciation	<u>(90,702)</u>
Total	<u><u>\$ 6,442</u></u>

Note 4 - Notes Payable

Notes payable consist of the following at June 30, 2022:

Note payable, principal and interest at 5.00%, collateralized the amounts constituting 5% of the advance apportionment in each of the months of July 2022 and August 2022, apportioned pursuant to Education Code Section 14041(a)(2) that is the LCFF State Aid portion of such School's total general purpose entitlement with a carrying value of \$305,600. Balance due at June 30, 2022:

\$ 305,600

Note 5 - Operating Leases

The Organization leases five facility sites located in Lompoc, Santa Maria, Goleta, Atascadero, and Arroyo Grande, California. All leases, with the exception of Arroyo Grande, are yearly agreements and expire in accordance with appropriate contracts on June 30. Arroyo Grande's lease was recently renewed for a two-year term and expires June 30, 2023. Lease expense for the fiscal year ending June 30, 2022 was \$335,638, which is included in occupancy in the statement of functional expenses.

Future minimum lease payments are as follows:

Year Ending June 30,	Lease Payment
2023	\$ 86,400

The Organization receives no sublease rental revenues nor pays any contingent rentals associated with these leases.

Note 6 - Net Assets

Net assets consist of the following at June 30, 2022:

Net Assets Without Donor Restrictions	
Designated for Classified School Employees Professional Development	\$ 2,850
Undesignated net assets	<u>1,199,035</u>
Total net assets without donor restrictions	<u>\$ 1,201,885</u>

Note 7 - Employee Retirement Systems

Qualified employees are covered under multiple-employer defined benefit pension plans maintained by agencies of the State of California. Academic employees are members of the California State Teachers' Retirement System (CalSTRS).

The risks of participating in these multi-employer defined benefit pension plans are different from single-employer plans because: (a) assets contributed to the multi-employer plan by one employer may be used to provide benefits to employees of other participating employers, (b) the required member, employer, and State contribution rates are set by the California Legislature, and (c) if the Organization chooses to stop participating in the multi-employer plan, it may be required to pay a withdrawal liability to the plan. The Organization has no plans to withdraw from this multi-employer plan.

The details of the plan are as follows:

California State Teachers' Retirement System (CalSTRS)

Plan Description

The Organization contributes to the State Teachers Retirement Plan (STRP) administered by the California State Teachers' Retirement System (CalSTRS). STRP is a cost-sharing multiple-employer public employee retirement system defined benefit pension plan. Benefit provisions are established by State statutes, as legislatively amended, within the State Teachers' Retirement Law.

A full description of the pension plan regarding benefit provisions, assumptions (for funding, but not accounting purposes), and membership information is listed in the June 30, 2020, annual actuarial valuation report, Defined Benefit Program Actuarial Valuation. This report and CalSTRS audited financial information are publicly available reports that can be found on the CalSTRS website under Publications at: <http://www.calstrs.com/member-publications>.

Benefits Provided

The STRP provides retirement, disability and survivor benefits to beneficiaries. Benefits are based on members' final compensation, age and years of service credit. Members hired on or before December 31, 2012, with five years of credited service are eligible for the normal retirement benefit at age 60. Members hired on or after January 1, 2013, with five years of credited service are eligible for the normal retirement benefit at age 62. The normal retirement benefit is equal to 2.0% of final compensation for each year of credited service.

The STRP is comprised of four programs: Defined Benefit Program, Defined Benefit Supplement Program, Cash Balance Benefit Program and Replacement Benefits Program. The STRP holds assets for the exclusive purpose of providing benefits to members and beneficiaries of these programs. CalSTRS also uses plan assets to defray reasonable expenses of administering the STRP. Although CalSTRS is the administrator of the STRP, the State is the sponsor of the STRP and obligor of the trust. In addition, the State is both an employer and nonemployer contributing entity to the STRP.

The Organization contributes exclusively to the STRP Defined Benefit Program; thus, disclosures are not included for the other plans.

The STRP provisions and benefits in effect at June 30, 2022, are summarized as follows:

	STRP Defined Benefit Program	
	On or before December 31, 2012	On or after January 1, 2013
Hire date	2% at 60	2% at 62
Benefit formula	5 years of service	5 years of service
Benefit vesting schedule	Monthly for life	Monthly for life
Benefit payments	60	62
Retirement age	2.0% - 2.4%	2.0% - 2.4%
Monthly benefits as a percentage of eligible compensation	10.25%	10.205%
Required employee contribution rate	16.92%	16.92%
Required employer contribution rate	10.828%	10.828%
Required state contribution rate		

Contributions

Required member, the Organization, and State of California contributions rates are set by the California Legislature and Governor and detailed in Teachers' Retirement Law. The contributions rates are expressed as a level percentage of payroll using the entry age normal actuarial method. In accordance with AB 1469, employer contributions into the CalSTRS will be increasing to a total of 19.1% of applicable member earnings phased over a seven-year period. The contribution rates for each plan for the year ended June 30, 2022, are presented above, and the Organization's total contributions were \$718,695.

On Behalf Payments

The State of California makes contributions to CalSTRS on behalf of the Organization. These payments consist of State General Fund contributions to CalSTRS in the amount of \$392,531 (10.828% of annual payroll). Under accounting principles generally accepted in the United States of America, these amounts are to be reported as revenues and expenditures. Accordingly, these amounts have been recorded in these financial statements.

Note 8 - Contingencies, Risks, and Uncertainties

The Organization has received State and Federal funds for specific purposes that are subject to review and audit by the grantor agencies. Although such audits could generate disallowances under terms of the grants, it is believed that any reimbursement, if required, would not be material.

Note 9 - Subsequent Events

The Organization's management has evaluated events or transactions that may occur for potential recognition or disclosure in the financial statements through November 29, 2022, which is the date the financial statements were available to be issued. Management has determined that there were no subsequent events or transactions that would have a material impact on the current year financial statements.



Supplementary Information

June 30, 2022

The Trivium Academy of Classical Education

The Trivium Academy of Classical Education
Schedule of Expenditures of Federal Awards
Year Ended June 30, 2022

Federal Grantor/Pass-Through Grantor/Program or Cluster Title	Federal Financial Assistance Listing	Pass-Through Entity Identifying Number	Federal Expenditures
U.S. Department of Education			
Passed through California Department of Education (CDE)			
Special Education Cluster			
Basic Local Assistance Entitlement	84.027	13379	\$ 116,716
American Rescue Plan (ARP) Part B, Sec. 611			
Local Assistance Entitlement	84.027	15638	<u>33,168</u>
Total Special Education (IDEA) Cluster			<u>149,884</u>
Passed through California Department of Education (CDE)			
COVID-19 - Elementary and Secondary School Emergency Relief (ESSER) Fund	84.425D	15536	51,362
COVID-19 - Elementary and Secondary School Emergency Relief II (ESSER II) Fund	84.425D	15547	296,116
COVID-19 - Expanded Learning Opportunities (ELO) Grant (ESSER II) State Reserves	84.425D	15618	69,615
COVID-19 - Expanded Learning Opportunities (ELO) Grant GEER II	84.425C	15619	7,924
COVID-19 - Expanded Learning Opportunities (ELO) (ESSER III) State Reserve, Emergency Needs	84.425U	15620	13,539
COVID-19 - Expanded Learning Opportunities (ELO) (ESSER III) State Reserve, Learning Loss	84.425U	15621	23,338
COVID-19 - Elementary and Secondary School Emergency Relief III (ESSER III) Fund	84.425U	15559	415,549
COVID-19 - Elementary and Secondary School Emergency Relief III (ESSER III) Fund: Learning Loss	84.425U	10155	<u>27,135</u>
Subtotal			<u>904,578</u>
Title I, Part A, Basic Grants Low-Income and Neglected	84.010	14329	78,559
Title II, Part A, Supporting Effective Instruction	84.367	14341	8,529
Title III, English Learner Student Program	84.365	14346	6,548
Title IV, Part A, Student Support and Academic Enrichment	84.424	15396	<u>30,000</u>
Total U.S. Department of Education			<u>1,028,214</u>
Federal Communications Commission (FCC)			
Emergency Connectivity Fund	32.009	[1]	<u>77,833</u>
Total Federal Financial Assistance			<u>\$ 1,255,931</u>

[1] Direct Funded.

ORGANIZATION

The Trivium Academy of Classical Education (the Organization) operates schools providing homeschool/independent study instruction to students in grades kindergarten through twelve in California under five charters. Charters were granted for each school for up to five years. As of June 30, 2022, the Organization operated the following:

Charter School Name	Charter Number	Sponsoring Agency	Charter Expiration	Grades Served	Number of Students Served
Trivium Charter School	1319	Blochman Union	June 30, 2025	K-12	319
Trivium Charter School: Voyage	1995	Blochman Union	June 30, 2025	K-12	299
Trivium Charter School: Adventure	1994	Blochman Union	June 30, 2025	K-12	240

Governing Board

Member	Office	Term Expires
Annette Lawrence	President	June 30, 2025
Sarah Bruce	Secretary	June 30, 2024
Steve Bucholz	Treasurer	June 30, 2022
Patricia Osaki	Trustee	June 30, 2024
Pam Jonidis	Trustee	June 30, 2022

Administration

Name	Title
Trisha Vais	Executive Director

The Trivium Academy of Classical Education
Schedule of Average Daily Attendance
Year Ended June 30, 2022

Trivium Charter School

	Second Period Report	Annual Report
Regular ADA/Nonclassroom Based		
Transitional kindergarten through third	121.72	121.68
Fourth through sixth	90.23	89.70
Seventh and eighth	45.53	45.29
Ninth through twelfth	54.33	55.08
	<u>54.33</u>	<u>55.08</u>
Total regular ADA	<u>311.81</u>	<u>311.75</u>
Classroom Based ADA		
Transitional kindergarten through third	-	-
Fifth and sixth	-	-
Seventh and eighth	-	-
Ninth through twelfth	-	-
	<u>-</u>	<u>-</u>
Total classroom based ADA	<u>-</u>	<u>-</u>

The Charter School only operated a nonclassroom based program.

The Trivium Academy of Classical Education
Schedule of Average Daily Attendance
Year Ended June 30, 2022

Trivium Charter School: Voyage

	<u>Second Period Report</u>	<u>Annual Report</u>
Regular ADA/Nonclassroom Based		
Transitional kindergarten through third	125.94	125.02
Fourth through sixth	70.68	70.17
Seventh and eighth	41.34	41.40
Ninth through twelfth	<u>58.32</u>	<u>58.22</u>
Total regular ADA	<u><u>296.28</u></u>	<u><u>294.81</u></u>
Classroom based ADA		
Transitional kindergarten through third	-	-
Fifth and sixth	-	-
Seventh and eighth	-	-
Ninth through twelfth	<u>-</u>	<u>-</u>
Total classroom based ADA	<u><u>-</u></u>	<u><u>-</u></u>

The Charter School only operated a nonclassroom based program.

The Trivium Academy of Classical Education
Schedule of Average Daily Attendance
Year Ended June 30, 2022

Trivium Charter School: Adventure

	<u>Second Period Report</u>	<u>Annual Report</u>
Regular ADA/Nonclassroom Based		
Transitional kindergarten through third	79.57	79.57
Fourth through sixth	50.61	50.52
Seventh and eighth	46.48	47.37
Ninth through twelfth	40.08	39.87
	<u>40.08</u>	<u>39.87</u>
Total regular ADA	<u><u>216.74</u></u>	<u><u>217.33</u></u>
Classroom based ADA		
Transitional kindergarten through third	-	-
Fifth and sixth	-	-
Seventh and eighth	-	-
Ninth through twelfth	-	-
	<u>-</u>	<u>-</u>
Total classroom based ADA	<u><u>-</u></u>	<u><u>-</u></u>

The Charter School only operated a nonclassroom based program.

California *Education Code* Section 47612.5 states this schedule does not apply to independent study programs; accordingly, such schedule has not been presented.

The Trivium Academy of Classical Education
Reconciliation of Annual Financial and Budget Report with Audited Financial Statements
Year Ended June 30, 2022

There were no adjustments to the Unaudited Actual Financial Report, which required reconciliation to the audited financial statements at June 30, 2022.

The Trivium Academy of Classical Education
Combining Statement of Financial Position
June 30, 2022

	Trivium Charter School	Trivium Charter School: Voyage	Trivium Charter School: Adventure
Assets			
Current assets			
Cash and cash equivalents	\$ -	\$ -	\$ -
Receivables	407,108	293,537	234,363
Intra-entity receivable	581,508	167,029	177,006
Prepaid expenses	31,774	27,891	23,496
Total current assets	<u>1,020,390</u>	<u>488,457</u>	<u>434,865</u>
Non-current assets			
Security deposits	-	4,100	-
Property and equipment, net	4,407	872	1,163
Total non-current assets	<u>4,407</u>	<u>4,972</u>	<u>1,163</u>
Total assets	<u><u>\$ 1,024,797</u></u>	<u><u>\$ 493,429</u></u>	<u><u>\$ 436,028</u></u>
Liabilities			
Current liabilities			
Accounts payable	\$ 604,981	\$ 82,810	\$ 61,711
Accrued liabilities	-	-	-
Accrued compensated absences	58,589	62,987	50,573
Note payable	73,500	95,700	136,400
Refundable advance	142,467	114,602	86,667
Intra-entity payable	-	-	-
Total current liabilities	<u>879,537</u>	<u>356,099</u>	<u>335,351</u>
Net Assets			
Without donor restrictions	<u>145,260</u>	<u>137,330</u>	<u>100,677</u>
Total liabilities and net assets	<u><u>\$ 1,024,797</u></u>	<u><u>\$ 493,429</u></u>	<u><u>\$ 436,028</u></u>

The Trivium Academy of Classical Education
Combining Statement of Financial Position
June 30, 2022

	Home Office Network	Eliminations	Total
Assets			
Current assets			
Cash and cash equivalents	\$ 2,140,423	\$ -	\$ 2,140,423
Receivables	497	-	935,505
Intra-entity receivable	-	(925,543)	-
Prepaid expenses	61,293	-	144,454
Total current assets	2,202,213	(925,543)	3,220,382
Non-current assets			
Security deposits	-	-	4,100
Property and equipment, net	-	-	6,442
Total non-current assets	-	-	10,542
Total assets	\$ 2,202,213	\$ (925,543)	\$ 3,230,924
Liabilities			
Current liabilities			
Accounts payable	\$ 58,998	\$ -	\$ 808,500
Accrued liabilities	399,054	-	399,054
Accrued compensated absences	-	-	172,149
Note payable	-	-	305,600
Refundable advance	-	-	343,736
Intra-entity payable	925,543	(925,543)	-
Total current liabilities	1,383,595	(925,543)	2,029,039
Net Assets			
Without donor restrictions	818,618	-	1,201,885
Total liabilities and net assets	\$ 2,202,213	\$ (925,543)	\$ 3,230,924

The Trivium Academy of Classical Education
Combining Statement of Activities
Year Ended June 30, 2022

	Trivium Charter School	Trivium Charter School: Voyage	Trivium Charter School: Adventure
Support and Revenues			
Local Control Funding Formula	\$ 2,905,212	\$ 2,746,609	\$ 2,013,540
Federal revenue	565,865	369,683	320,383
Other state revenue	546,618	509,051	423,613
Local revenues	133	103	103
Interest income	1,707	1,326	1,133
Fundraising revenue	27	21	18
	<u>4,019,562</u>	<u>3,626,793</u>	<u>2,758,790</u>
Total support and revenues			
Expenses			
Program services	3,263,880	3,112,877	2,378,680
Management and general	679,449	633,718	529,053
Fundraising and development	99	91	70
	<u>3,943,428</u>	<u>3,746,686</u>	<u>2,907,803</u>
Total expenses			
Change in Net Assets Before Intra-Entity Transfers	76,134	(119,893)	(149,013)
Intra-Entity Transfers	<u>(28,709)</u>	<u>207,503</u>	<u>174,440</u>
Change in Net Assets	47,425	87,610	25,427
Net Assets, Beginning of Year	<u>97,835</u>	<u>49,720</u>	<u>75,250</u>
Net Assets, End of Year	<u>\$ 145,260</u>	<u>\$ 137,330</u>	<u>\$ 100,677</u>

The Trivium Academy of Classical Education
Combining Statement of Activities
Year Ended June 30, 2022

	Home Office Network	Total
Support and Revenues		
Local Control Funding Formula	\$ -	\$ 7,665,361
Federal revenue	-	1,255,931
Other state revenue	-	1,479,282
Local revenues	-	339
Interest income	-	4,166
Fundraising revenue	-	66
	<u>-</u>	<u>10,405,145</u>
Total support and revenues	<u>-</u>	<u>10,405,145</u>
Expenses		
Program services	-	8,755,437
Management and general	-	1,842,220
Fundraising and development	-	260
	<u>-</u>	<u>10,597,917</u>
Total expenses	<u>-</u>	<u>10,597,917</u>
Change in Net Assets Before Intra-Entity Transfers	-	(192,772)
Intra-Entity Transfers	<u>(353,234)</u>	<u>-</u>
Change in Net Assets	(353,234)	(192,772)
Net Assets, Beginning of Year	<u>1,171,852</u>	<u>1,394,657</u>
Net Assets, End of Year	<u>\$ 818,618</u>	<u>\$ 1,201,885</u>

Note 1 - Purpose of Supplementary Schedules

Schedule of Expenditures of Federal Awards

Basis of Presentation

The accompanying schedule of expenditures of federal awards (the schedule) includes the federal award activity of the Organization under programs of the federal government for the year ended June 30, 2022. The information is presented in accordance with the requirements of Title 2 U.S. Code of Federal Regulations Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Because the schedule presents only a selected portion of the operations of the Organization, it is not intended to and does not present the financial position, changes in net assets, or cash flows of the Organization.

Summary of Significant Accounting Policies

Expenditures reported in the schedule are reported on the accrual basis of accounting. When applicable, such expenditures are recognized following the cost principles contained in the Uniform Guidance, wherein certain types of expenditures are not allowable or are limited as to reimbursement. No federal financial assistance has been provided to a subrecipient.

Indirect Cost Rate

The Organization does not draw for indirect administrative expenses and has not elected to use the ten percent de minimus cost rate.

Local Education Agency Organization Structure

This schedule provides information about the Organization's operations, members of the governing board, and members of the administration.

Schedule of Average Daily Attendance

Average daily attendance (ADA) is a measurement of the number of pupils attending classes of the Organization. The purpose of attendance accounting from a fiscal standpoint is to provide the basis on which apportionments of State funds are made to local education agencies. This schedule provides information regarding the attendance of students at the Organization.

Schedule of Instructional Time

This schedule presents information on the amount of instructional time offered by the Organization and whether the Organization complied with the provisions of *Education Code* Sections 47612 and 47612.5, if applicable.

The Organization must maintain their instructional minutes at the 1986-87 requirements, as required by *Education Code* Section 47612.5.

Reconciliation of Annual Financial Report with Audited Financial Statements

This schedule provides the information necessary to reconcile the net assets reported on the unaudited actual financial report to the audited financial statements.

Combining Statement of Financial Position and Combining Statement of Activities

The combining statement of financial position and combining statement of activities are included to provide information regarding the individual programs of the charter schools within the Organization and are presented on the accrual basis of accounting. Eliminating entries in the combining statement of financial position and combining statement of activities are for activities between each charter school.



Independent Auditor's Reports
June 30, 2022

The Trivium Academy of Classical Education



CPAs & BUSINESS ADVISORS

Independent Auditor's Report on Internal Control over Financial Reporting and on Compliance and Other Matters Based on an Audit of Financial Statements Performed in Accordance with Government Auditing Standards

Governing Board
The Trivium Academy of Classical Education
Santa Maria, California

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of The Trivium Academy of Classical Education (the Organization), which comprise the statement of financial position as of June 30, 2022, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements, and have issued our report thereon dated November 29, 2022.

Report on Internal Control over Financial Reporting

In planning and performing our audit of the financial statements, we considered the Organization's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Organization's internal control. Accordingly, we do not express an opinion on the effectiveness of the Organization's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the Organization's financial statements will not be prevented or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

Compliance and Other Matters

As part of obtaining reasonable assurance about whether the Organization's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the Organization's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Organization's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

A handwritten signature in black ink that reads "Eide Bailly LLP". The signature is written in a cursive, flowing style.

Rancho Cucamonga, California
November 29, 2022



CPAs & BUSINESS ADVISORS

Independent Auditor's Report on Compliance for the Major Program and on Internal Control over Compliance Required by the Uniform Guidance

Governing Board
The Trivium Academy of Classical Education
Santa Maria, California

Report on Compliance for the Major Federal Program

Opinion on the Major Federal Program

We have audited The Trivium Academy of Classical Education's (the Organization) compliance with the types of compliance requirements identified as subject to audit in the *OMB Compliance Supplement* that could have a direct and material effect on the Organization's major federal program for the year ended June 30, 2022. The Organization's major federal program is identified in the summary of auditor's results section of the accompanying schedule of findings and questioned costs.

In our opinion, the Organization complied, in all material respects, with the compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended June 30, 2022.

Basis for Opinion on the Major Federal Program

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America (GAAS); the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States (*Government Auditing Standards*); and the audit requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Our responsibilities under those standards and the Uniform Guidance are further described in the Auditor's Responsibilities for the Audit of Compliance section of our report.

We are required to be independent of the Organization and to meet our other ethical responsibilities, in accordance with relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion on compliance for the major federal program. Our audit does not provide a legal determination of the Organization's compliance with the compliance requirements referred to above.

Responsibilities of Management for Compliance

Management is responsible for compliance with the requirements referred to above and for the design, implementation, and maintenance of effective internal control over compliance with the requirements of laws, statutes, regulations, rules and provisions of contracts or grant agreements applicable to the Organization's federal programs.

Auditor's Responsibilities for the Audit of Compliance

Our objectives are to obtain reasonable assurance about whether material noncompliance with the compliance requirements referred to above occurred, whether due to fraud or error, and express an opinion on the Organization's compliance based on our audit. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS, *Government Auditing Standards*, and the Uniform Guidance will always detect material noncompliance when it exists. The risk of not detecting material noncompliance resulting from fraud is higher than for that resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Noncompliance with the compliance requirements referred to above is considered material, if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report on compliance about the Organization's compliance with the requirements of the major federal program as a whole.

In performing an audit in accordance with GAAS, *Government Auditing Standards*, and the Uniform Guidance, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material noncompliance, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the Organization's compliance with the compliance requirements referred to above and performing such other procedures as we considered necessary in the circumstances.
- Obtain an understanding of the Organization's internal control over compliance relevant to the audit in order to design audit procedures that are appropriate in the circumstances and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of the Organization's internal control over compliance. Accordingly, no such opinion is expressed.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and any significant deficiencies and material weaknesses in internal control over compliance that we identified during the audit.

Report on Internal Control over Compliance

A *deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. A *material weakness in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the Auditor's Responsibilities for the Audit of Compliance section above and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies in internal control over compliance. Given these limitations, during our audit we did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses, as defined above. However, material weaknesses or significant deficiencies in internal control over compliance may exist that were not identified.

Our audit was not designed for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, no such opinion is expressed.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

A handwritten signature in black ink that reads "Eide Bailly LLP". The signature is written in a cursive, flowing style.

Rancho Cucamonga, California
November 29, 2022



CPAs & BUSINESS ADVISORS

**Independent Auditor's Report on State Compliance; Report on Internal Control Over Compliance
Required by the 2021-2022 Guide for Annual Audits of K-12 Local Education Agencies and State
Compliance Reporting**

Governing Board
The Trivium Academy of Classical Education
Santa Maria, California

Report on State Compliance

Unmodified Opinion

We have audited The Trivium Academy of Classical Education's (the Organization) compliance with the types of compliance requirements identified as subject to audit in the *2021-2022 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, applicable to the state laws and regulations listed in the table below for the year ended June 30, 2022.

In our opinion, the Organization complied, in all material respects, with the state compliance requirements referred to above for the year ended June 30, 2022.

Basis for Opinion

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America (GAAS); the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States (*Government Auditing Standards*); and the audit requirements of the *2021-2022 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*. Our responsibilities under those standards and the *2021-2022 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting* are further described in the Auditor's Responsibilities for the Audit of Compliance section of our report.

We are required to be independent of the Organization and to meet our other ethical responsibilities, in accordance with relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion on state compliance with the compliance requirements subject to audit in the *2021-2022 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*. Our audit does not provide a legal determination of the Organization's compliance with the compliance requirements referred to above.

Responsibilities of Management for Compliance

Management is responsible for compliance with the requirements referred to above and for the design, implementation, and maintenance of effective internal control over compliance with the requirements of laws, statutes, regulations, rules and provisions of contracts or grant agreements applicable to the Organization's compliance with the requirements listed in the table below.

Auditor's Responsibilities for the Audit of Compliance

Our objectives are to obtain reasonable assurance about whether material noncompliance with the compliance requirements listed below has occurred, whether due to fraud or error, and express an opinion on the Organization's compliance based on our audit. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS, *Government Auditing Standards*, and the *2021-2022 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting* will always detect material noncompliance when it exists. The risk of not detecting material noncompliance resulting from fraud is higher than for that resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Noncompliance with the compliance requirements referred to above is considered material, if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report on compliance about the Organization's compliance with the requirements listed in the table below.

In performing an audit in accordance with GAAS, *Government Auditing Standards*, and the *2021-2022 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material noncompliance, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the Organization's compliance with the compliance requirements referred to above and performing such other procedures as we considered necessary in the circumstances.
- Obtain an understanding of the Organization's internal control over compliance relevant to the audit in order to design audit procedures that are appropriate in the circumstances and to test and report on internal control over compliance in accordance with the *2021-2022 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, but not for the purpose of expressing an opinion on the effectiveness of the Organization's internal control over compliance. Accordingly, no such opinion is expressed.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and any significant deficiencies and material weaknesses in internal control over compliance that we identified during the audit.

Report on Internal Control over Compliance

A deficiency in internal control over compliance exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a state program on a timely basis. *A material weakness in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a state program will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with compliance requirements as identified in the table below that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the Auditor's Responsibilities for the Audit of Compliance section above and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies in internal control over compliance. Given these limitations, during our audit we did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses, as defined above. However, material weaknesses or significant deficiencies in internal control over compliance may exist that were not identified.

Our audit was not designed for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, no such opinion is expressed.

Compliance Requirements Tested

In connection with the audit referred to above, we selected and tested transactions and records to determine the Organization's compliance with laws and regulations applicable to the following items:

	Procedures Performed
LOCAL EDUCATION AGENCIES OTHER THAN CHARTER SCHOOLS	
Attendance	No, see below
Teacher Certification and Misassignments	No, see below
Kindergarten Continuance	No, see below
Independent Study	No, see below
Continuation Education	No, see below
Instructional Time	No, see below
Instructional Materials	No, see below
Ratio of Administrative Employees to Teachers	No, see below
Classroom Teacher Salaries	No, see below
Early Retirement Incentive	No, see below
Gann Limit Calculation	No, see below
School Accountability Report Card	No, see below
Juvenile Court Schools	No, see below
Middle or Early College High Schools	No, see below
K-3 Grade Span Adjustment	No, see below
Transportation Maintenance of Effort	No, see below

	Procedures Performed
Apprenticeship: Related and Supplemental Instruction	No, see below
Comprehensive School Safety Plan	No, see below
District of Choice	No, see below
SCHOOL DISTRICTS, COUNTY OFFICES OF EDUCATION, AND CHARTER SCHOOLS	
California Clean Energy Jobs Act	No, see below
After/Before School Education and Safety Program:	
General Requirements	No, see below
After School	No, see below
Before School	No, see below
Proper Expenditure of Education Protection Account Funds	Yes
Unduplicated Local Control Funding Formula Pupil Counts	Yes
Local Control and Accountability Plan	Yes
Independent Study-Course Based	No, see below
Immunizations	No, see below
Educator Effectiveness	Yes
Expanded Learning Opportunities Grant (ELO-G)	Yes
Career Technical Education Incentive Grant	No, see below
In Person Instruction Grant	No, see below
CHARTER SCHOOLS	
Attendance	Yes
Mode of Instruction	No, see below
Nonclassroom-Based Instruction/Independent Study	Yes
Determination of Funding for Nonclassroom-Based Instruction	Yes
Annual Instructional Minutes – Classroom Based	No, see below
Charter School Facility Grant Program	No, see below

Programs listed above for “Local Education Agencies Other Than Charter Schools” are not applicable to charter schools; therefore, we did not perform any related procedures.

We did not perform California Clean Energy Jobs Act procedures because the Organization did not receive funding for this program.

We did not perform procedures for the After/Before School Education and Safety Program because the Organization did not offer the program.

The Organization does not offer an Independent Study-Course Based Program; therefore, we did not perform any procedures related to the Independent Study-Course Based Program.

The Organization’s charter schools were not listed on the immunization assessment reports; therefore, we did not perform any related procedures.

We did not perform Career Technical Education Incentive Grant procedures because the Organization did not receive funding for this grant.

We did not perform In Person Instruction Grant procedures because the Organization did not receive funding for this grant.

We did not perform procedures for Mode of Instruction nor for Annual Instructional Minutes – Classroom Based because the Organization is entirely nonclassroom-based.

We did not perform procedures for the Charter School Facility Grant Program because the Organization did not receive funding for this program.

The purpose of this report on internal control over state compliance is solely to describe the scope of our testing of internal control over state compliance and the results of that testing based on the requirements of the *2021-2022 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*. Accordingly, this report is not suitable for any other purpose.

A handwritten signature in black ink that reads "Eide Bailly LLP". The signature is written in a cursive, flowing style.

Rancho Cucamonga, California
November 29, 2022



Schedule of Findings and Questioned Costs
June 30, 2022

The Trivium Academy of Classical Education

Financial Statements

Type of auditor's report issued	Unmodified
Internal control over financial reporting	
Material weaknesses identified	No
Significant deficiencies identified not considered to be material weaknesses	None Reported
Noncompliance material to financial statements noted?	No

Federal Awards

Internal control over major program	
Material weaknesses identified	No
Significant deficiencies identified not considered to be material weaknesses	None Reported
Type of auditor's report issued on compliance for major programs	Unmodified
Any audit findings disclosed that are required to be reported in accordance with Uniform Guidance 2 CFR 200.516(a)	No

Identification of major programs

<u>Name of Federal Program or Cluster</u>	<u>Federal Financial Assistance Listing</u>
COVID-19 Education Stabilization Fund	84.425C, 84.425D, 84.425U
Dollar threshold used to distinguish between type A and type B programs	\$750,000
Auditee qualified as low-risk auditee?	No

State Compliance

Internal control over state compliance for programs	
Material weaknesses identified	No
Significant deficiencies identified not considered to be material weaknesses	None Reported
Type of auditor's report issued on compliance for programs	Unmodified

None reported.

None reported.

None reported.

There were no audit findings reported in the prior year's Schedule of Findings and Questioned Costs.

VI – D

**CHARTER SCHOOL 1ST INTERIM
FINANCIAL REPORT -- ALTERNATIVE FORM**
July 1, 2022 to Oct 31, 2022

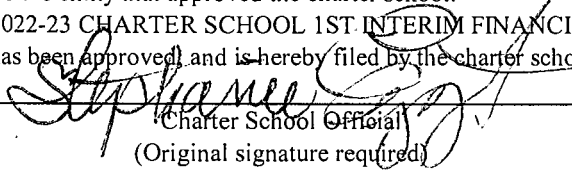
CHARTER SCHOOL CERTIFICATION

Charter School Name: Family Partnership Home Study Charter School
CDS #: 42691120111773
Charter Approving Entity: Blochman Union School District
County: Santa Barbara
Charter #: 7630

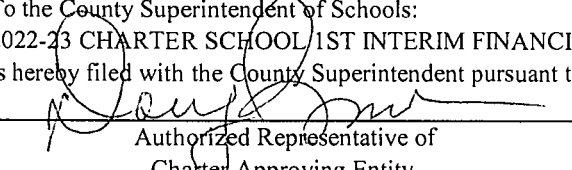
submission if the following information is missing:

For information regarding this report, please contact:

<u>For County Fiscal Contact:</u>	<u>For Approving Entity:</u>	<u>For Charter School:</u>
Nicole Evenson	Doug Brown	Stephanie Eggert
Name	Name	Name
District Financial Manager	Superintendent	Executive Director
Title	Title	Title
805-934-4710 ext. 5271	(805) 937-1148 ext 114	(805) 348-3333 ext. 1025
Telephone	Telephone	Telephone
nevenson@sbceo.org	dbrown@blochmanusd.org	stephanie.eggert@fpcharter.org
Email address	E-mail address	E-mail address

To the entity that approved the charter school:
(X) 2022-23 CHARTER SCHOOL 1ST INTERIM FINANCIAL REPORT -- ALTERNATIVE FORM: This report has been approved, and is hereby filed by the charter school pursuant to Education Code Section 42100(b).
Signed:  Date: December 12, 2022
Charter School Official
(Original signature required)

Printed
Name: Stephanie Eggert Title: Executive Director

To the County Superintendent of Schools:
(X) 2022-23 CHARTER SCHOOL 1ST INTERIM FINANCIAL REPORT -- ALTERNATIVE FORM: This report is hereby filed with the County Superintendent pursuant to Education Code Section 42100(a).
Signed:  Date: 12-14-2022
Authorized Representative of
Charter Approving Entity
(Original signature required)

Printed
Name: Doug Brown Title: Superintendent

To the Superintendent of Public Instruction:
(X) 2022-23 CHARTER SCHOOL 1ST INTERIM FINANCIAL REPORT -- ALTERNATIVE FORM: This report verified for mathematical accuracy by the County Superintendent of Schools pursuant to Education Code Section 42100(a).
Signed: _____ Date: _____
County Superintendent/Designee
(Original signature required)

**CHARTER SCHOOL 2022-23 1st INTERIM
FINANCIAL REPORT -- ALTERNATIVE FORM
JULY 1, 2022 to OCTOBER 31, 2022**

Charter School Name: Family Partnership Home Study Charter School
CDS #: 42-69112-0111773
Charter Approving Entity: Blochman Union School District
County: Santa Barbara County
Charter #: 0763

This charter school uses the following basis of accounting:
(Please enter an "X" in the applicable box below; check only one box)

☒ **Accrual Basis** (Applicable Capital Assets/Interest on Long-Term Debt/Long-Term Liabilities objects are 6900, 7438, 9400-9499, and 9660-9669)
☐ **Modified Accrual Basis** (Applicable Capital Outlay/Debt Service objects are 6100-6170, 6200-6500, 7438, and 7439)

Description	Object Code	Unrestricted	Restricted	Total
A. REVENUES				
1. LCFF Sources				
State Aid - Current Years	8011	2,597,963.00		2,597,963.00
Education Protection Account	8012	1,191,527.00		1,191,527.00
State Aid - Prior Years	8019	0.00		0.00
Transfers to Charter Schools in Lieu of Property Taxes	8096	481,360.00		481,360.00
Other Revenue Limit Transfers	8091, 8097		107,435.00	107,435.00
Total, LCFF Sources		4,270,850.00	107,435.00	4,378,285.00
2. Federal Revenues (see NOTE in section L)				
No Child Left Behind/Every Student Succeeds Act	8290		0.00	0.00
Special Education - Federal	8181, 8182		133,592.00	133,592.00
Child Nutrition - Federal	8220		0.00	0.00
Donated Food Commodities	8221		0.00	0.00
Other Federal Revenues	8110, 8260-8299	0.00	26,972.00	26,972.00
Total, Federal Revenues		0.00	160,564.00	160,564.00
3. Other State Revenues				
Special Education State	StateRevSE		216,292.00	216,292.00
All Other State Revenues	StateRevAO	79,963.40	689,257.34	769,220.74
Total, Other State Revenues		79,963.40	905,549.34	985,512.74
4. Other Local Revenues				
All Other Local Revenues	LocalRevAO	13,502.36	0.00	13,502.36
Total, Local Revenues		13,502.36	0.00	13,502.36
5. TOTAL REVENUES		4,364,315.76	1,173,548.34	5,537,864.10
B. EXPENDITURES				
1. Certificated Salaries				
Certificated Teachers' Salaries	1100	788,534.02	1,248,552.79	2,037,086.81
Certificated Pupil Support Salaries	1200	106,855.00	0.00	106,855.00
Certificated Supervisors' and Administrators' Salaries	1300	115,757.00	0.00	115,757.00
Other Certificated Salaries	1900	0.00	0.00	0.00
Total, Certificated Salaries		1,011,146.02	1,248,552.79	2,259,698.81
2. Non-certificated Salaries				
Non-certificated Instructional Salaries	2100	46,948.65	90,000.00	136,948.65
Non-certificated Support Salaries	2200	0.00	0.00	0.00
Non-certificated Supervisors' and Administrators' Salaries	2300	124,906.57	0.00	124,906.57
Clerical and Office Salaries	2400	134,735.26	0.00	134,735.26
Other Non-certificated Salaries	2900	0.00	0.00	0.00
Total, Non-certificated Salaries		306,590.48	90,000.00	396,590.48
3. Employee Benefits				
STRS	3101-3102	103,544.04	318,390.24	421,934.28
PERS	3201-3202	56,771.63	0.00	56,771.63
OASDI / Medicare / Alternative	3301-3304	36,871.81	23,617.52	60,489.33
Health and Welfare Benefits	3401-3402	305,717.80	0.00	305,717.80
Unemployment Insurance	3501-3502	7,102.48	5,328.80	12,431.28
Workers' Compensation Insurance	3601-3602	37,600.35	558.00	38,158.35
OPEB, Allocated	3701-3702	0.00	0.00	0.00
OPEB, Active Employees	3751-3752	0.00	0.00	0.00
Other Employee Benefits	3901-3902	0.00	0.00	0.00
Total, Employee Benefits		547,608.11	347,894.55	895,502.67
4. Books and Supplies				
Approved Textbooks and Core Curricula Materials	4100	0.00	0.00	0.00
Books and Other Reference Materials	4200	60,512.76	28,383.88	88,896.64
Materials and Supplies	4300	73,743.52	43,296.46	117,039.98
Noncapitalized Equipment	4400	12,890.26	0.00	12,890.26
Food	4700	10,052.77	0.00	10,052.77
Total, Books and Supplies		157,199.31	71,680.34	228,879.65

5. Services and Other Operating Expenditures				
Subagreements for Services	5100	0.00	0.00	0.00
Travel and Conferences	5200	54,603.98	0.00	54,603.98
Dues and Memberships	5300	9,086.67	0.00	9,086.67
Insurance	5400	69,533.00	0.00	69,533.00
Operations and Housekeeping Services	5500	96,865.60	500.00	97,365.60
Rentals, Leases, Repairs, and Noncap. Improvements	5600	387,677.83	0.00	387,677.83
Transfers of Direct Costs	5700-5799	128,125.50	0.00	128,125.50
Professional/Consulting Services and Operating Expend.	5800	205,400.20	92,953.41	298,353.61
Communications	5900	43,880.65	0.00	43,880.65
Total, Services and Other Operating Expenditures		995,173.43	93,453.41	1,088,626.84
6. Capital Outlay				
(Objects 6100-6170, 6200-6500 for modified accrual basis only)				
Land and Land Improvements	6100-6170			0.00
Buildings and Improvements of Buildings	6200			0.00
Books and Media for New School Libraries or Major Expansion of School Libraries	6300			0.00
Equipment	6400			0.00
Equipment Replacement	6500			0.00
Depreciation Expense (for accrual basis only)	6900	0.00	0.00	0.00
Total, Capital Outlay		0.00	0.00	0.00
7. Other Outgo				
Tuition to Other Schools	7110-7143	0.00	0.00	0.00
Transfers of Pass-Through Revenues to Other LEAs	7211-7213	0.00	0.00	0.00
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE	0.00	0.00	0.00
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO	0.00	0.00	0.00
All Other Transfers	7281-7299	0.00	0.00	0.00
Transfers of indirect Costs	7300-7399	0.00	0.00	0.00
Debt Service:				
Interest	7438	0.00	0.00	0.00
Principal (for modified accrual basis only)	7439	0.00	0.00	0.00
Total, Other Outgo		0.00	0.00	0.00
8. TOTAL EXPENDITURES		3,017,717.36	1,851,581.09	4,869,298.45
Description		Object Code	Unrestricted	Restricted
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPEND. BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)				Total
			1,346,598.40	(678,032.75)
D. OTHER FINANCING SOURCES / USES				
1. Other Sources	8930-8979	0.00	0.00	0.00
2. Less: Other Uses	7630-7699	0.00	0.00	0.00
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999	(678,032.75)	678,032.75	0.00
4. TOTAL OTHER FINANCING SOURCES / USES		(678,032.75)	678,032.75	0.00
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)			668,565.65	(0.00)
F. FUND BALANCE/NET POSITON				
1. Beginning Fund Balance/Net Position				
a. As of July 1	9791	2,647,492.13	52,741.00	2,700,233.13
9 b. Adjustments/Restatements	9793, 9795	(90,114.13)		(90,114.13)
c. Adjusted Beginning Fund Balance/Net Position		2,557,378.00	52,741.00	2,610,119.00
2. Ending Fund Balance/Net Position June 30 (E + F1c)		3,225,943.65	52,741.00	3,278,684.65
Components of Ending Fund Balance (Modified Accrual Basis on				
a. Nonspendable				
# Revolving Cash (equals Object 9130)	9711			0.00
# Stores (equals Object 9320)	9712			0.00
# Prepaid Expenditures (equals Object 9330)	9713			0.00
# All Others	9719			0.00
b. Restricted	9740			0.00
c. Committed				0.00
# Stabilization Arrangments	9750			0.00
# Other Commitments	9760			0.00
d. Assigned	9780			0.00
e. Unassigned/Unappropriated				0.00
Reserve for Economic Uncertainties	9789			0.00
Unassigned / Unappropriated Amount	9790M			0.00
Components of Ending Net Position (Accrual Basis only)				
a. Net Investment in Capital Assets	9796	2,928,684.65	0.00	2,928,684.65
b. Restricted Net Position	9797		350,000.00	350,000.00

c. Unrestricted Net Position		9790A	297,259.01	297,259.00	0.00
Description		Object Code	Unrestricted	Restricted	Total
G. ASSETS					
1. Cash					
In County Treasury	9110	2,696,642.36	52,741.00	2,749,383.36	
Fair Value Adjustment to Cash in County Treasury	9111	0.00	0.00	0.00	
In Banks	9120	397,733.99	0.00	397,733.99	
In Revolving Fund	9130	0.00	0.00	0.00	
With Fiscal Agent/Trustee	9135	0.00	0.00	0.00	
Collections Awaiting Deposit	9140	0.00	0.00	0.00	
2. Investments	9150	0.00	0.00	0.00	
3. Accounts Receivable	9200	121,913.00	0.00	121,913.00	
4. Due from Grantor Government	9290	0.00	0.00	0.00	
5. Stores	9320	0.00	0.00	0.00	
6. Prepaid Expenditures (Expenses)	9330	9,354.30	0.00	9,354.30	
7. Other Current Assets	9340	300.00	0.00	300.00	
8. Capital Assets (for accrual basis only)	9400-9499	0.00	0.00	0.00	
9. TOTAL ASSETS		3,225,943.65	52,741.00	3,278,684.65	
H. DEFERRED OUTFLOWS OF RESOURCES					
# Deferred Outlaws of Resources	9490	0.00	0.00	0.00	
# TOTAL DEFERRED OUTFLOWS		0.00	0.00	0.00	
I. LIABILITIES					
1. Accounts Payable	9500	0.00	0.00	0.00	
2. Due to Grantor Government	9590	0.00	0.00	0.00	
3. Current Loans	9640	0.00	0.00	0.00	
4. Deferred Revenue	9650	0.00	0.00	0.00	
5. Long-Term Liabilities (for accrual basis only)	9660-9669	0.00	0.00	0.00	
6. TOTAL LIABILITIES		0.00	0.00	0.00	
J. Deferred Inflows of Resources					
# Deferred Inflows of Resources	9690	0.00	0.00	0.00	
TOTAL DEFERRED INFLOWS		0.00	0.00	0.00	
K. FUND BALANCE					
Ending Fund Balance, June 30 (G9-H6) (must agree with Line F2)		3,225,943.65	52,741.00	3,278,684.65	

K. FEDERAL EVERY STUDENT ACT (ESSA) MAINTENANCE OF EFFORT REQUIREMENT
NOTE: IF YOUR CHARTER SCHOOL RECEIVED FEDERAL FUNDING, AS REPORTED IN SECTION A2, THE FOLLOWING ADDITIONAL INFORMATION MUST BE PROVIDED IN ORDER FOR THE CDE TO CALCULATE COMPLIANCE WITH THE FEDERAL NO CHILD LEFT BEHIND (NCLB) MAINTENANCE OF EFFORT REQUIREMENT:

1. Federal Revenue Used for Capital Outlay and Debt Service

Include in the Capital Outlay and Debt Service expenditures reported in sections B6 and B7 are the following amounts paid out of federal funds

Federal Program Name (If no amounts, indicate "NONE")

	Capital Outlay	Debt Service	Total
a. None	0.00	0.00	0.00
b. None	0.00	0.00	0.00
c. None	0.00	0.00	0.00
d. None	0.00	0.00	0.00
e. None	0.00	0.00	0.00
f. None	0.00	0.00	0.00
g. None	0.00	0.00	0.00
h. None	0.00	0.00	0.00
i. None	0.00	0.00	0.00
j. None	0.00	0.00	0.00
TOTAL FEDERAL REVENUES USED FOR CAPITAL OUTLAY AND DEBT SERVICE	0.00	0.00	0.00

2. Community Services Expenditures

Provide the amount of State and Local Funds reported in section B that were expended for Community Services Activities

Objects of Expenditures	Amount (Enter "0.00" if none)
a. Certificated Salaries	1000-1999
b. Noncertificated Salaries	2000-2999
c. Employee Benefits	3000-3999
d. Books and Supplies	4000-4999
e. Services and Other Operating Expenditures	5000-5999
TOTAL COMMUNITY SERVICES EXPENDITURES	0.00

3. State and Local Expenditures to be Used for 2017-18 ESSA Annual Maintenance of Effort Calculation:

Results of this calculation will be used for comparison with expenditures. Failure to maintain the required 90 percent expenditures level on either an aggregate or per capita expenditures basis will result in reduction to allocations for covered programs in 2020-21

a. Total Expenditures (B8) 4,869,298.45

b. Less Federal Expenditures (Total A2)
 (Revenues are used as proxy for expenditures because most federal revenues
 are normally recognized in the period that qualifying expenditures are incurred)

c. Subtotal of State & Local Expenditures
 (a minus b)

d. Less Community Services
 (L2 Total)

e. Less Capital Outlay & Debt Service
 (Total B6 plus objects 7438 and 7439, less L1 Total)

TOTAL STATE & LOCAL EXPENDITURES SUBJECT TO MOE
 (c minus d minus e)

	160,564.00
	4,708,724.45
	0.00
	0.00
	4,708,724.45

Principal Apportionment Data Collection (PADC)

Processing Cycle: 2022-23 P-1 , Reporting Period: 2022-23 P-1

Home / Data Entry / Charter School / Family Partnership Charter / Attendance Charter School

Attendance Charter School

Record Information



Entity Information

County: Santa Barbara
School: Family Partnership Charter
CDS Code: 42 69112 0111773
Charter Number: 0763
Data ID: 4B9C1A01

Details

Last Saved By: mduston
Last Saved Date: 12/14/2022 12:25:58 PM
Last Validation By: mduston
Last Validation Date: 12/15/2022 3:34:56 PM

Validation Information

Certification Information

Number of Records: 7
Number of Errors: 0
Number of Warnings: 1
Passed Data Validation: Yes

Charter School - District Oversight: seggett - 12/15/2022 4:14:51 PM
School District: dbrown1 - 12/16/2022 8:23:42 AM
County Office of Education: None

Charter Status

Data ID:	4B9C1A01
Does this charter school operate multiple instructional tracks? YES (Multitrack)	<input type="checkbox"/> A-1a
Does this charter school operate multiple instructional tracks? NO (Single Track)	<input checked="" type="checkbox"/> A-1b
Instructional Tracks: If Yes (Multitrack) was selected in A-1, check the box for Track A and each additional track in alphabetical order. Note: subsequent data entry will need to contain information for all tracks selected.	
	A-2

Track A	A-2a	<input type="checkbox"/>
Track B	A-2b	<input type="checkbox"/>
Track C	A-2c	<input type="checkbox"/>
Track D	A-2d	<input type="checkbox"/>
Track E	A-2e	<input type="checkbox"/>
Is this charter school in its first year of operation? A-3		
YES (move on to Line A-4)	A-3a	<input type="checkbox"/>
NO (move on to Line A-5)	A-3b	<input checked="" type="checkbox"/>
Date (mm/dd/yyyy) Instruction Commenced A-4		
Single Track/Track A	A-4a	8/22/2022
Track B	A-4b	
Track C	A-4c	
Track D	A-4d	
Track E	A-4e	
Did the charter school cease operation or instruction during the current fiscal year? A-5		
YES (move on to Line A-6)	A-5a	<input type="checkbox"/>
NO (move on to Line A-7)	A-5b	<input checked="" type="checkbox"/>
Date (mm/dd/yyyy) Operation or Instruction Ceased A-6		
Single Track/Track A	A-6a	
Track B	A-6b	
Track C	A-6c	
Track D	A-6d	
Track E	A-6e	
Days of Operation. Only required at P-1 and P-2 if school ceased operation during the fiscal year. Required for all charter schools at Annual. A-7		
Single Track/Track A	A-7a	
Track B	A-7b	

Track C	A-7c	
Track D	A-7d	
Track E	A-7e	
Indicate the Type of Instruction	A-8	
Classroom-based	A-8a	<input type="checkbox"/>
Nonclassroom-based	A-8b	<input checked="" type="checkbox"/>
Combination	A-8c	<input type="checkbox"/>

ADA

Reported ADA

Single track charter schools report all ADA in the Single TRK/TRK A record. Charter schools operating multiple instructional tracks report ADA for Track A in Single TRK/TRK A (record 1 of 5), and report ADA for Tracks B, C, D, E by navigating to records 2 through 5.

Countywide charters authorized pursuant to EC 47605.6 and charters approved by the State Board of Education pursuant to EC Section 47605(k) must also complete the ADA Allocation Tab.

Instructional Track

Single TRK/TRK

Classroom-based ADA

	TK/K-3	Grades 4-6	Grades 7-8	Grades 9-12	Total
B-1	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
B-2	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
B-3	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
B-4	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
B-5	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

Nonclassroom-based ADA

Regular Nonclassroom-based ADA	C-1	90.81	64.73	50.3	173.91	379.75
Extended Year Special Education [EC 56345(b)(3)]						
Nonclassroom-based ADA (Divisor 175)	C-2	0	0	0	0	0
Special Education - Nonpublic, Nonsectarian Schools [EC 56366(a)(7)] and/or Nonpublic, Nonsectarian Schools - Licensed Childrens Institutions						
Nonclassroom-based ADA	C-3	0	0	0	0	0
Extended Year Special Education - Nonpublic, Nonsectarian Schools [EC 56366(a)(7)] and/or Nonpublic, Nonsectarian Schools - Licensed Childrens Institutions						
Nonclassroom-based ADA (Divisor 175)	C-4	0	0	0	0	0
Nonclassroom-based ADA Totals for Track (Sum of C-1 through C-4)	C-5	90.81	64.73	50.3	173.91	379.75
ADA Totals for Track						
Total Regular ADA (B-1 + C-1)	D-1	90.81	64.73	50.3	173.91	379.75
Total Extended Year Special Education [EC 56345(b)(3)] ADA (Divisor 175) (B-2 + C-2)	D-2	0	0	0	0	0
Total Special Education - Nonpublic, Nonsectarian Schools [EC 56366(a)(7)] and/or Nonpublic, Nonsectarian Schools - Licensed Childrens Institutions						
ADA (B-3 + C-3)	D-3	0	0	0	0	0
Total Extended Year Special Education - Nonpublic, Nonsectarian Schools [EC 56366(a)(7)] and/or Nonpublic, Nonsectarian Schools - Licensed Childrens Institutions						
ADA (B-4 + C-4)	D-4	0	0	0	0	0
ADA Totals for Track (Sum of D-1 through D-4)	D-5	90.81	64.73	50.3	173.91	379.75
Transitional Kindergarten ADA						
Classroom-based ADA for Students in Transitional Kindergarten pursuant to EC 46300 included in Line B-5 (TK/K-3 Column, First Year ADA Only)	E-1	0	0	0	0	0
Non-Classroom-based ADA for Students in Transitional Kindergarten pursuant to EC 46300 included in Line C-5 (TK/K-3 Column, First Year ADA Only)	E-2	0	0	0	0	0
Total ADA for Students in Transitional Kindergarten pursuant to EC 46300 (Sum of E-1 and E-2)	E-3	0	0	0	0	0
Other ADA						
Nonclassroom-based ADA not eligible for funding pursuant to EC 47612.5(b) and 51745.6 and not included in C-5	E-4	0	0	0	0	0
Course Based Independent Study ADA, pursuant to EC 51749.5, included in C-5	E-5	0	0	0	0	0

Course Based Independent Study ADA not eligible for funding, pursuant to EC 47612.5(b) and 51745.6, included in E-4

E-6

ADA Allocation

Countywide charters approved pursuant to EC Section 47605.6 and charters approved by the State Board of Education pursuant to EC Section 47605(k) must complete the ADA Allocation Tab to report ADA by school district of residence for calculation of in-lieu of property taxes.

Reported ADA

Enter data for the first record, save, and click Add New to select county and school district of residence for the second and each subsequent record.

County of Residence

Santa Barbara

District of Residence

Blochman Union Elementary

Classroom-based ADA

Regular Classroom-based ADA

Extended Year Special Education [EC 56345(b)(3)]

Classroom-based ADA (Divisor 175)

Special Education - Nonpublic, Nonsectarian Schools [EC 56366(a)(7)] and/or Nonpublic, Nonsectarian Schools - Licensed Childrens Institutions Classroom-based ADA

Extended Year Special Education - Nonpublic, Nonsectarian Schools [EC 56366(a)(7)] and/or Nonpublic, Nonsectarian Schools - Licensed Childrens Institutions Classroom-based ADA (Divisor 175)

Classroom-based ADA Totals for District of Residence (Sum of F-1 through F-4)

	TK/K-3	Grades 4-6	Grades 7-8	Grades 9-12	Total
F-1	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
F-2	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
F-3	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
F-4	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
F-5	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

Nonclassroom-based ADA

Regular Nonclassroom-based ADA

Extended Year Special Education [EC 56345(b)(3)]

Nonclassroom-based ADA (Divisor 175)

Special Education - Nonpublic, Nonsectarian Schools [EC 56366(a)(7)] and/or Nonpublic, Nonsectarian Schools - Licensed Childrens Institutions

Nonclassroom-based ADA

G-1	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
G-2	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
G-3	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

Extended Year Special Education - Nonpublic,
Nonsectarian Schools [EC 56366(a)(7)] and/or
Nonpublic, Nonsectarian Schools - Licensed Childrens
Institutions Nonclassroom-based ADA (Divisor 175)
Nonclassroom-based ADA Totals for District of
Residence (Sum of G-1 through G-4)

G-4	0	0	0	0
G-5	0	0	0	0

ADA Totals for District of Residence

Total Regular ADA (F-1 + G-1)
Total Extended Year Special Education [EC 56345(b)(3)]
ADA (Divisor 175) (F-2 + G-2)
Total Special Education - Nonpublic, Nonsectarian
Schools [EC 56366(a)(7)] and/or Nonpublic,
Nonsectarian Schools - Licensed Childrens Institutions
ADA (F-3 + G-3)
Total Extended Year Special Education - Nonpublic,
Nonsectarian Schools [EC 56366(a)(7)] and/or
Nonpublic, Nonsectarian Schools - Licensed Childrens
Institutions (Divisor 175) ADA (F-4 + G-4)
ADA Totals for District of Residence (Sum of H-1
through H-4)

H-1	0	0	0	0
H-2	0	0	0	0
H-3	0	0	0	0
H-4	0	0	0	0
H-5	0	0	0	0

Summary

Summary of Reported ADA for All Tracks

Classroom-based ADA Totals for All Tracks (Sum of all
records B-5)
Nonclassroom-based ADA Totals for All Tracks (Sum of
all records C-5)

	TK/K-3	Grades 4-6	Grades 7-8	Grades 9-12	Total
I-1	0	0	0	0	0
I-2	90.81	64.73	50.3	173.91	379.75

ADA Totals for All Tracks

Total Regular ADA (Sum of All Records D-1)
Total Extended Year Special Education [EC 56345(b)(3)]
ADA (Sum of All Records D-2)
Total Special Education - Nonpublic, Nonsectarian
Schools [EC 56366(a)(7)] and/or Nonpublic,
Nonsectarian Schools - Licensed Childrens Institutions
ADA (Sum of All Records D-3)
Total Extended Year Special Education - Nonpublic,
Nonsectarian Schools [EC 56366(a)(7)] and/or
Nonpublic, Nonsectarian Schools - Licensed Childrens
Institutions ADA (Sum of All records D-4)
ADA Totals for All Tracks (Sum of J-1 through J-4)

J-1	90.81	64.73	50.3	173.91	379.75
J-2	0	0	0	0	0
J-3	0	0	0	0	0
J-4	0	0	0	0	0
J-5	90.81	64.73	50.3	173.91	379.75

Summary of Reported ADA for All Districts of Residence

Applicable to countywide charter schools authorized pursuant to EC 47605.6 and State Board of Education authorized charters

Classroom-based ADA Totals for All Districts (sum of all records F-5)
 Nonclassroom-based ADA Totals for All Districts (sum of all records G-5)

K-1	0	0	0	0	0	0
K-2	0	0	0	0	0	0

ADA Totals for All Districts of Residence

Total Regular ADA (sum of all records H-1)
 Total Extended Year Special Education [EC 56345(b)(3)] ADA (Divisor 175) (Sum of All Records H-2)
 Total Special Education - Nonpublic, Nonsectarian Schools [EC 56366(a)(7)] and/or Nonpublic, Nonsectarian Schools - Licensed Childrens Institutions ADA (Sum of All Records H-3)
 Total Extended Year Special Education - Nonpublic, Nonsectarian Schools [EC 56366(a)(7)] and/or Nonpublic, Nonsectarian Schools - Licensed Childrens Institutions (Divisor 175) ADA (Sum of All Records H-4)
 ADA Totals for All Districts (Sum of L-1 through L-4)

L-1	0	0	0	0	0	0
L-2	0	0	0	0	0	0
L-3	0	0	0	0	0	0
L-4	0	0	0	0	0	0
L-5	0	0	0	0	0	0

Principal Apportionment Data Collection (PADC)

Processing Cycle: 2022-23 P-1 , Reporting Period: 2022-23 P-1

Home / Data Entry / Charter School / Family Partnership Charter / Charter School Physical Location

Charter School Physical Location

Record Information



Entity Information

County: Santa Barbara
School: Family Partnership Charter
CDS Code: 42 69112 0111773
Charter Number: 0763
Data ID: 77CD6C24

Details

Last Saved By: mduston
Last Saved Date: 12/14/2022 1:18:38 PM
Last Validation By: mduston
Last Validation Date: 12/15/2022 3:49:48 PM

Validation Information

Number of Records: 7
Number of Errors: 0
Number of Warnings: 0
Passed Data Validation: Yes

Certification Information

Charter School - District Oversight: saggett - 12/15/2022 4:15:56 PM
School District: dbrown1 - 12/16/2022 8:21:26 AM
County Office of Education: None

Charter School Physical Location

Enter records for all school district(s) where the charter school is physically located or has a school facility. This may include school districts that are in addition to, or differ from, the charter school's authorizing school district. A charter school with a location that falls within the boundaries of multiple school districts, such as when their location/facility falls within both an elementary and a high school district, should report both school districts in their physical location data.

Charter school physical location(s) will be used for purposes of calculating the charter school's LCFF concentration grant [EC Section 42238.02(f)(2)(A)]. Pursuant to EC Section 42238.02(f)(2)(B), charter schools authorized by a school district, or that were approved on appeal by the county or the SBE, do not have to report physical location data if the authorizer or the school district that denied the charter school's petition is the only school district where the charter school is physically located. A charter school that is a county program charter or a countywide charter pursuant to EC Sections 47605.5 or 47605.6, respectively, must report physical location data.

Pursuant to EC Section 42238.02(f)(2)(B), the reported physical location(s) are final as of P-2.

County	Santa Barbara
School District	Blochman Union Elementary

Notes

Type in your message

Principal Apportionment Data Collection (PADC)

Processing Cycle: 2022-23 P-1 , Reporting Period: 2022-23 P-1

Home / Data Entry / Charter School / Family Partnership Charter / Charter School Physical Location

Charter School Physical Location

Record Information



Entity Information

County: Santa Barbara
School: Family Partnership Charter
CDS Code: 42 69112 0111773
Charter Number: 0763
Data ID: 77CD6C24

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Certification Information

Charter School - District Oversight: seggert - 12/15/2022 4:15:56 PM
School District: dbrown1 - 12/16/2022 8:21:26 AM
County Office of Education: None

Charter School Physical Location

Enter records for all school district(s) where the charter school is physically located or has a school facility. This may include school districts that are in addition to, or differ from, the charter school's authorizing school district. A charter school with a location that falls within the boundaries of multiple school districts, such as when their location/facility falls within both an elementary and a high school district, should report both school districts in their physical location data.

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Pursuant to EC Section 42238.02(f)(2)(B), the reported physical location(s) are final as of P-2.

County	Santa Barbara
School District	Orcutt Union Elementary

Notes

Type in your message

Principal Apportionment Data Collection (PADC)

Processing Cycle: 2022-23 P-1 , Reporting Period: 2022-23 P-1

Home / Data Entry / Charter School / Family Partnership Charter / Charter School Physical Location

Charter School Physical Location

Record Information



Entity Information

County: Santa Barbara
School: Family Partnership Charter
CDS Code: 42 69112 0111773
Charter Number: 0763
Data ID: 77CD6C24

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Certification Information

Charter School - District Oversight: seggett - 12/15/2022 4:15:56 PM
School District: dbrown1 - 12/16/2022 8:21:26 AM
County Office of Education: None

Charter School Physical Location

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County

Santa Barbara

School District

Santa Maria-Bonita

Notes

Type in your message

Principal Apportionment Data Collection (PADC)

Processing Cycle: 2022-23 P-1 , Reporting Period: 2022-23 P-1

Home / Data Entry / Charter School / Family Partnership Charter / Charter School Physical Location

Charter School Physical Location

Record Information



Entity Information

County: Santa Barbara
School: Family Partnership Charter
CDS Code: 42 69112 0111773
Charter Number: 0763
Data ID: 77CD6C24

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School District: dbrown1 - 12/16/2022 8:21:26 AM
County Office of Education: None

Charter School Physical Location

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County

Santa Barbara

School District

Santa Maria Joint Union High

Principal Apportionment Data Collection (PADC)

Processing Cycle: 2022-23 P-1 , Reporting Period: 2022-23 P-1

Charter School Physical Location

Record Information



Entity Information

County: Santa Barbara
School: Family Partnership Charter
CDS Code: 42 69112 0111773
Charter Number: 0763
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Certification Information

Charter School - District Oversight: seggert - 12/15/2022 4:15:56 PM
School District: dbrown1 - 12/16/2022 8:21:26 AM
County Office of Education: None

Charter School Physical Location

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Pursuant to EC Section 42238.02(f)(2)(B), the reported physical location(s) are final as of P-2.

County	Santa Barbara
School District	Santa Ynez Valley Union High

Notes

Type in your message

Principal Apportionment Data Collection (PADC)

Processing Cycle: 2022-23 P-1 , Reporting Period: 2022-23 P-1

Home / Data Entry / Charter School / Family Partnership Charter / Charter School Physical Location

Charter School Physical Location

Record Information



Entity Information

County: Santa Barbara
School: Family Partnership Charter
CDS Code: 42 69112 0111773
Charter Number: 0763
Data ID: 77CD6C24

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Charter School - District Oversight: seggert - 12/15/2022 4:15:56 PM
School District: dbrown1 - 12/16/2022 8:21:26 AM
County Office of Education: None

Charter School Physical Location

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Pursuant to EC Section 42238.02(f)(2)(B), the reported physical location(s) are final as of P-2.

County	San Luis Obispo
School District	San Luis Coastal Unified

Notes

Type in your message

Principal Apportionment Data Collection (PADC)

Processing Cycle: 2022-23 P-1 , Reporting Period: 2022-23 P-1

Home / Data Entry / Charter School / Family Partnership Charter / Charter School Physical Location

Charter School Physical Location

Record Information



Entity Information

County: Santa Barbara
School: Family Partnership Charter
CDS Code: 42 69112 0111773
Charter Number: 0763
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County Office of Education: None

Charter School Physical Location

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Pursuant to EC Section 42238.02(f)(2)(B), the reported physical location(s) are final as of P-2.

County	Santa Barbara
School District	Solvang Elementary

**PARTNERSHIP SCHOOLS OF THE CENTRAL COAST
OPERATING AS FAMILY PARTNERSHIP CHARTER SCHOOL ("FPCS")
CHARTER SCHOOL NUMBER 0763
COUNTY OF SANTA BARBARA
SANTA MARIA, CALIFORNIA**

Audit Report
June 30, 2022 and 2021

**PARTNERSHIP SCHOOLS OF THE CENTRAL COAST
OPERATING AS FAMILY PARTNERSHIP CHARTER SCHOOL ("FPCS")**
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June 30, 2022 and 2021

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FINANCIAL SECTION



INDEPENDENT AUDITORS' REPORT

Board of Directors
Partnership Schools of the Central Coast
Operating as Family Partnership Charter School ("FPCS")
Orcutt, California

Report on the Financial Statements

Opinion

We have audited the accompanying financial statements of Family Partnership Charter School (a nonprofit organization), which comprise the statement of financial position as of June 30, 2022, and the related statements of activities, functional expenses, and cash flows for the fiscal year then ended, and the related notes to financial statements.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Family Partnership Charter School as of June 30, 2022, and the changes in its net assets and its cash flows for the fiscal year then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinions

We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States and the *2021-2022 Guide for Annual Audits of California K-12 Local Educational Agencies and State Compliance Reporting*, prescribed by Title 5, *California Code of Regulations*, Section 19810. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the Partnership Schools of the Central Coast and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Family Partnership Charter School's ability to continue as a going concern within one year after the date that the financial statements are available to be issued.

Auditors' Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinions. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards and *Government Auditing Standards* will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards and *Government Auditing Standards*, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.

- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Partnership Schools of the Central Coast's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Family Partnership Charter School's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

Supplementary Information

Our audit was performed for the purpose of forming an opinion on the financial statements that collectively comprise the Partnership Schools of the Central Coast's basic financial statements. The supplementary information listed in the table of contents, are presented for purposes of additional analysis and are not a required part of the basic financial statements.

The supplementary information listed in the table of contents, are the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated in all material respects in relation to the financial statements as a whole.

Other Reporting Required by Government Auditing Standards

In accordance with *Government Auditing Standards*, we have also issued our report dated December 12, 2022, on our consideration of the Family Partnership Charter School's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the School's internal control over financial reporting and compliance.

Moss, Remy & Hargreave LLP

Santa Maria, California
December 12, 2022

PARTNERSHIP SCHOOLS OF THE CENTRAL COAST (FPCS)
Statement of Financial Position
June 30, 2022

	Without Donor Restrictions	With Donor Restrictions	Total
Assets			
Current assets			
Cash	\$ 2,309,211	\$ 52,741	\$ 2,361,952
Accounts receivable	368,627		368,627
Prepaid expenses and deposits	9,654		9,654
Total current assets	<u>2,687,492</u>	<u>52,741</u>	<u>2,740,233</u>
Fixed assets			
Fixed assets, at cost	12,796		12,796
Less: Accumulated depreciation	<u>(12,796)</u>		<u>(12,796)</u>
Net fixed assets			
Total assets	<u>\$ 2,687,492</u>	<u>\$ 52,741</u>	<u>\$ 2,740,233</u>
Liabilities and net assets			
Current liabilities			
Accounts payable	\$ 9,478	\$ -	\$ 9,478
Accrued oversight fee	<u>120,636</u>		<u>120,636</u>
Total current liabilities	<u>130,114</u>		<u>130,114</u>
Total liabilities	<u>130,114</u>		<u>130,114</u>
Net assets			
Without donor restrictions	2,557,378		2,557,378
With donor restrictions		<u>52,741</u>	<u>52,741</u>
Total net assets	<u>2,557,378</u>	<u>52,741</u>	<u>2,610,119</u>
Total liabilities and net assets	<u>\$ 2,687,492</u>	<u>\$ 52,741</u>	<u>\$ 2,740,233</u>

The accompanying notes are an integral part of these financial statements.

PARTNERSHIP SCHOOLS OF THE CENTRAL COAST (FPCS)

Statement of Financial Position

June 30, 2021

	Without Donor Restrictions	With Donor Restrictions	Total
Assets			
Current assets			
Cash	\$ 1,517,447	\$ 52,741	\$ 1,570,188
Accounts receivable	312,959		312,959
Prepaid expenses and deposits	9,654		9,654
Total current assets	<u>1,840,060</u>	<u>52,741</u>	<u>1,892,801</u>
Fixed assets			
Fixed assets, at cost	12,796		12,796
Less: Accumulated depreciation	<u>(12,796)</u>		<u>(12,796)</u>
Net fixed assets			
Total assets	<u>\$ 1,840,060</u>	<u>\$ 52,741</u>	<u>\$ 1,892,801</u>
Liabilities and net assets			
Current liabilities			
Accounts payable	\$ 14,863	\$ -	\$ 14,863
Accrued oversight fee	103,633		103,633
Total current liabilities	<u>118,496</u>		<u>118,496</u>
Total liabilities	<u>118,496</u>		<u>118,496</u>
Net assets			
Without donor restrictions	1,721,564		1,721,564
With donor restrictions		52,741	52,741
Total net assets	<u>1,721,564</u>	<u>52,741</u>	<u>1,774,305</u>
Total liabilities and net assets	<u>\$ 1,840,060</u>	<u>\$ 52,741</u>	<u>\$ 1,892,801</u>

The accompanying notes are an integral part of these financial statements.

PARTNERSHIP SCHOOLS OF THE CENTRAL COAST (FPCS)

Statement of Activities

Fiscal Year Ended June 30, 2022

	Without Donor Restrictions	With Donor Restrictions	Total
Revenues:			
LCFF sources	\$ 3,683,101	\$ -	\$ 3,683,101
Property taxes	590,479		590,479
Federal sources	102,904		102,904
State sources	571,994		571,994
Local sources	61,581		61,581
Interest	(71,756)		(71,756)
Total revenues	<u>4,938,303</u>		<u>4,938,303</u>
Expenses:			
Program services:			
Charter school	3,679,397		3,679,397
Support services:			
Management and general	<u>368,807</u>		<u>368,807</u>
Total expenses	<u>4,048,204</u>		<u>4,048,204</u>
Increase in net assets	<u>890,099</u>		<u>890,099</u>
Net assets at beginning of fiscal year	1,721,564	52,741	1,774,305
Prior period adjustment	(54,285)		(54,285)
Net assets at beginning of fiscal year, restated	<u>1,667,279</u>	<u>52,741</u>	<u>1,720,020</u>
Net assets at end of fiscal year	<u>\$ 2,557,378</u>	<u>\$ 52,741</u>	<u>\$ 2,610,119</u>

The accompanying notes are an integral part of these financial statements.

PARTNERSHIP SCHOOLS OF THE CENTRAL COAST (FPCS)

Statement of Activities

Fiscal Year Ended June 30, 2021

	Without Donor Restrictions	With Donor Restrictions	Total
Revenues:			
LCFF sources	\$ 3,020,595	\$ -	\$ 3,020,595
Property taxes	585,099		585,099
Federal sources	46,763		46,763
State sources	432,579		432,579
Local sources	403,942		403,942
Interest	6,690		6,690
Total revenues	<u>4,495,668</u>		<u>4,495,668</u>
Expenses:			
Program services:			
Charter school	3,631,595		3,631,595
Support services:			
Management and general	<u>405,819</u>		<u>405,819</u>
Total expenses	<u>4,037,414</u>		<u>4,037,414</u>
Increase in net assets	458,254		458,254
Net assets at beginning of fiscal year	<u>1,263,310</u>	<u>52,741</u>	<u>1,316,051</u>
Net assets at end of fiscal year	<u>\$ 1,721,564</u>	<u>\$ 52,741</u>	<u>\$ 1,774,305</u>

The accompanying notes are an integral part of these financial statements.

PARTNERSHIP SCHOOLS OF THE CENTRAL COAST (FPCS)

Statements of Functional Expenses for Program and Support Services

Fiscal Years Ended June 30, 2022 & June 30, 2021

	2022			2021		
	Program Services	Support Services	Total Expenses	Program Services	Support Services	Total Expenses
	Charter School	Management and General		Charter School	Management and General	
Salaries and wages	\$ 1,963,481	\$ 223,024	\$ 2,186,505	\$ 1,987,803	\$ 245,683	\$ 2,233,486
Payroll taxes	46,743	5,777	52,520	49,786	6,153	55,939
Employee benefits	519,695	64,232	583,927	528,336	65,300	593,636
Workers' compensation	11,594	1,433	13,027	14,147	1,749	15,896
Total personnel costs	2,541,513	294,466	2,835,979	2,580,072	318,885	2,898,957
Books and reference materials	90,297		90,297	101,592		101,592
Materials and supplies	93,585	12,125	105,710	33,030	4,280	37,310
Equipment	64,352		64,352	21,170		21,170
Travel and conferences	39,272	4,364	43,636	26,911	2,990	29,901
Dues and memberships		380	380		14,332	14,332
Insurance	36,830	4,092	40,922	57,054	6,339	63,393
Operations and housekeeping	57,676	6,408	64,084	54,782	6,087	60,869
Rents	368,666	19,403	388,069	365,907	19,258	385,165
Oversight fee	139,942		139,942	103,633		103,633
Professional services	208,200	23,129	231,329	247,984	27,554	275,538
Telephone	39,064	4,340	43,404	39,460	4,384	43,844
Postage		100	100		1,710	1,710
Total expenses	\$ 3,679,397	\$ 368,807	\$ 4,048,204	\$ 3,631,595	\$ 405,819	\$ 4,037,414
Percent of total expenses	90.89%	9.11%	100.00%	89.95%	10.05%	100.00%

The accompanying notes are an integral part of these financial statements.

PARTNERSHIP SCHOOLS OF THE CENTRAL COAST (FPCS)

Statement of Cash Flows

Fiscal Year Ended June 30, 2022

	Without Donor Restrictions	With Donor Restrictions	Total
Cash flows from operating activities			
Net increase in net assets	\$ 890,099	\$ -	\$ 890,099
Adjustments to reconcile (decrease) in net assets to net cash used by operating activities:			
Changes in operating assets and liabilities:			
(Increase) decrease in:			
Accounts receivable	(109,953)		(109,953)
Increase (decrease) in:			
Accounts payable	(5,385)		(5,385)
Accrued oversight fee	17,003		17,003
Net cash provided by operating activities	791,764		791,764
Net increase in cash and equivalents	791,764		791,764
Cash and cash equivalents at beginning of fiscal year	1,517,447	52,741	1,570,188
Cash and cash equivalents at end of fiscal year	\$ 2,309,211	\$ 52,741	\$ 2,361,952
Supplementary cash flow disclosure:			
Cash paid for interest	\$ -	\$ -	\$ -

The accompanying notes are an integral part of these financial statements.

PARTNERSHIP SCHOOLS OF THE CENTRAL COAST (FPCS)

Statement of Cash Flows

Fiscal Year Ended June 30, 2021

	Without Donor Restrictions	With Donor Restrictions	Total
Cash flows from operating activities			
Increase in net assets	\$ 458,254	\$ -	\$ 458,254
Adjustments to reconcile increase (decrease) in net assets to net cash provided by operating activities:			
Depreciation			
Changes in operating assets and liabilities:			
(Increase) decrease in:			
Accounts receivable	297,084		297,084
Increase (decrease) in:			
Accounts payable	(29,065)		(29,065)
Accrued oversight fee	15,924		15,924
Net cash provided by operating activities	742,197		742,197
Net increase in cash and equivalents	742,197		742,197
Cash and cash equivalents at beginning of fiscal year	775,250	52,741	827,991
Cash and cash equivalents at end of fiscal year	\$ 1,517,447	\$ 52,741	\$ 1,570,188
Supplementary cash flow disclosure:			
Cash paid for interest	\$ -	\$ -	\$ -

The accompanying notes are an integral part of these financial statements.

PARTNERSHIP SCHOOLS OF THE CENTRAL COAST (FPCS)

Notes to the Financial Statements

Fiscal Year Ended June 30, 2022

Note 1 - Significant Accounting Policies

The following is a summary of significant accounting policies followed in the preparation of these financial statements. The policies conform to accounting principles generally accepted in the United States of America applicable to voluntary health and welfare organizations and have been consistently applied.

Nature of operations

The Partnership Schools of the Central Coast, operating as Family Partnership Charter School ("FPCS") is a direct-funded independent study charter school sponsored by the Blochman Union School District, and formed as a California nonprofit corporation. FPCS serves students in grades K-12 that reside in Santa Barbara and San Luis Obispo counties in the central coast area of California, using a personalized approach to learning. FPCS derives its revenue primarily through the state, federal, and local government agencies.

Description of programs

Charter school program - Offers non-classroom based instruction through learning centers that focus on personalized blended learning and independent study, Montessori methods. All programs involve building a partnership between the school, student, parent, and advisor to support student learning.

Management and General - Includes the functions necessary to maintain the Organization's support program; ensure an adequate working environment; provide coordination and articulation of the Organization's program strategy through the office of the executive director; secure proper administrative functioning of the board of directors; maintain competent legal services for the program administration of the Organization; and manage the financial and budgetary responsibilities of the Organization.

Basis of accounting

The accompanying financial statements have been prepared on the accrual basis of accounting and, accordingly, reflect all significant receivables, payables, and other accruals.

Basis of presentation

Net assets, revenues, gains, and losses are classified based on the existence or absence of donor-imposed restrictions as follows:

Net assets without donor restrictions are net assets not subject to donor-imposed stipulations.

Net assets with donor restrictions are resources that are restricted by a donor for use for a particular purpose or in a future period. Some donor-imposed restrictions are temporary in nature, and the restriction will expire when the resources are used in accordance with the donor's instructions or when the stipulated time has passed. Other donor-imposed restrictions are perpetual in nature; the organization must continue to use the resources in accordance with the donor's instructions.

When a donor's restriction is satisfied, either by using the resources in the manner specified by the donor or by the passage of time, the expiration of the restriction is reported in the financial statements by reclassifying net assets from net assets with donor restrictions to net assets without donor restrictions. Net assets restricted for acquisition of buildings or equipment (or less commonly, the contribution of those assets directly) are reported as net assets with donor restrictions until the specified asset is placed in service by the organization, unless the donor provides more specific directions about the period of its use.

Use of estimates

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America includes the use of estimates that affect the financial statements. Accordingly, actual results could differ from those estimates.

Functional allocation of expenses

The costs of providing the various programs have been summarized on a functional basis in the statement of activities and the statement of functional expenses. Accordingly, certain management and general expenses have been allocated among the program and supporting services benefited.

PARTNERSHIP SCHOOLS OF THE CENTRAL COAST (FPCS)

Notes to the Financial Statements

Fiscal Year Ended June 30, 2022

Note 1 - Significant Accounting Policies (continued)

Tax status

FPCS has been determined to be exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code. FPCS qualifies for the charitable contribution deduction under Section 170(b)(1)(A) and has been classified as an organization other than a private foundation under Section 509(a)(2). With few exceptions, PSCC is no longer subject to U.S. federal and state income tax examinations by tax authorities for fiscal years before June 30, 2019 and 2018, respectively.

Cash

All short-term investments with original maturities of three months or less are considered to be cash equivalents. FPCS maintains most of its cash in the Santa Barbara County Treasury. The County pools these funds with those of other schools in the County and invests the cash. These pooled funds are carried at fair value. Interest earned is deposited quarterly into participating funds. Any investment gains or losses are proportionately shared by all funds in the pool. The County is authorized to deposit cash and invest excess funds by California Government Code Section 53648 et. seq.

Accounts receivable and allowance for doubtful accounts

Receivables are accounted for on the accrual basis and become past due after 30 days. No allowance for uncollectable accounts has been provided, as FPCS typically collects all outstanding amounts. Trade receivables are written off if all efforts at collection have failed and management determines that collection is unlikely.

Prepaid expenses and deposits

Prepaid expenses consists primarily of consulting fees, insurance, and rent paid in the current fiscal year for the following fiscal year. Prepaid expenses are removed from the statements of financial position and charged to expense in the fiscal year in which they are incurred. Deposits consist of cash held by landlords for learning centers and office space that are refundable upon lease termination.

Fixed assets

Purchases of fixed assets costing \$5,000 or more are capitalized. Donated fixed assets valued at \$5,000 or more are capitalized and recorded at fair value at the time of receipt. Expenditures for major renewals and betterments that extend the useful lives of property and equipment are capitalized. Expenditures for maintenance and repairs are charged to expense as incurred. The cost and accumulated depreciation of property sold or retired is removed from the related asset and accumulated depreciation accounts and any resulting gain or loss is recorded in the fiscal year of disposal. Depreciation is calculated utilizing the straight-line method over the estimated useful lives of the assets, which range from five to ten years for furniture, fixtures, software, and equipment.

Donations of property and equipment

Donations of property and equipment (long-lived assets) that do not have donor-imposed stipulations about how long the property must be used are recorded as contributions without donor restrictions in the fiscal year received.

Accrued oversight fee

An oversight fee calculated at three percent of FPCS' revenue is payable to Blochman Union School District each fiscal year for supervisory activities. Any unpaid oversight fee is accrued at fiscal year end.

Deferred revenue

Cash received for federal and state special projects and programs are recognized as revenue to the extent that qualified expenses have been incurred. Deferred revenue is recorded to the extent cash received on specific projects and programs exceed qualified expenses.

Revenue recognition

Grants and contributions are recognized as revenue when received, or receivables if the amount to be received can be reasonably estimated and collection is reasonably assured, under the accrual method of accounting. All other revenues are recorded when earned.

PARTNERSHIP SCHOOLS OF THE CENTRAL COAST (FPCS)

Notes to the Financial Statements

Fiscal Year Ended June 30, 2022

Note 1 - Significant Accounting Policies (continued)

Contributed services

FPCS records the fair value of contributed services in the financial statements if the services either (a) create or enhance a nonfinancial asset or (b) require specialized skills; are provided by persons possessing those skills; and would need to be purchased if they were not donated as required by ASC 958. Certain volunteers have donated significant amounts of time to FPCS' activities, that is not reflected in the accompanying financial statements because these services did not meet the above criteria.

Restricted and unrestricted revenue

Contributions that are restricted by the donor are reported as increases in net assets without donor restrictions if the restrictions expire (that is, when a stipulated time restriction ends or purpose restriction is accomplished) in the reporting period in which the revenue is recognized. All other donor-restricted contributions are reported as increases in net assets with donor restrictions. When a restriction expires, donor restricted net assets are reclassified to net assets without donor restrictions and reported in the statement of activities as net assets released from restrictions.

Advertising costs

Advertising costs intended to solicit revenue in an exchange transaction are recorded as management and general expenses in the period incurred.

Reclassifications

Certain amounts in the prior fiscal year financial statements have been reclassified to conform to the presentation in the current fiscal year financial statements.

Fair value measurements

FASB ASC 820, Fair Value Measurements and Disclosures, establishes a framework for measuring fair value. That framework provides a fair value hierarchy that prioritizes the inputs to valuation techniques used to measure value. The hierarchy gives the highest priority to unadjusted quoted prices in active markets for identical assets or liabilities (Level 1 measurements) and the lowest priority to unobservable inputs (Level 3 measurements). The three levels of the fair value hierarchy under FASB ASC 820 are described as follows:

Level 1. Inputs to the valuation methodology are unadjusted quoted prices for identical assets and liabilities in active markets that FPCS has the ability to access.

Level 2. Inputs to the valuation methodology include:

Quoted prices for similar assets or liabilities in active markets.

Quoted prices for identical or similar assets or liabilities in inactive markets.

Inputs other than quoted prices that are observable for the asset or liability.

Inputs that are derived principally or corroborated by observable market data by correlation or other means. If the asset or liability has a specified (contractual) term, the Level 2 input must be observable for substantially the full term of the asset or liability.

Level 3. Inputs to valuation methodology are unobservable and significant to the fair value measurement.

The fair value measurement level within the fair value hierarchy is based on the lowest level of any input that is significant to the fair value measurement. Valuation techniques used need to maximize the use of observable inputs and minimize the use of unobservable inputs.

PARTNERSHIP SCHOOLS OF THE CENTRAL COAST (FPSC)

Notes to the Financial Statements

Fiscal Year Ended June 30, 2022

Note 2 - Liquidity and Availability

Financial assets available for general expenditure, that is, without donor or other restriction limiting their use, within one year of June 30, 2022 are:

Financial Assets:	
Cash on hand and in banks	\$ 2,361,952
Accounts receivable	368,627
Less amounts with donor restrictions	(52,741)
Amounts available for expenditure within one year	<u>\$ 2,677,838</u>

The table above reflects the assets that PSCC will have available over the next twelve months that will be available for expenditure.

Note 3 - Cash

Cash is held in the Santa Barbara County Treasury and local bank accounts. Cash consisted of the following at June 30, 2022 and 2021:

	2022	2021
Santa Barbara County Treasury	\$ 2,349,060	\$ 1,217,976
Wells Fargo Bank	92,631	352,212
Total operating cash	<u>\$ 2,441,691</u>	<u>\$ 1,570,188</u>

FPSC had investments in the Santa Barbara County Investment Pool and these investments are measured under 2.

Cash maintained in the Santa Barbara County Treasury is part of the common investment pool. FPSC is considered to be an involuntary participant in the external pool. Interest is deposited quarterly to the funds of participating entities. The County is restricted by Government Code Section 53635, pursuant to Section 53601, to invest in time deposits, U.S. government securities, state registered warrants, notes or bonds, State Treasurer's investment pool, bankers' acceptances, commercial paper, negotiable certificates of deposit, and repurchase of reverse repurchase agreements.

Note 4 - Concentrations

Concentrations of receivables and revenues at June 30, 2022 and 2021, and for the fiscal years then ended, consisted of the following:

	2022		2021	
Concentrations of receivables:	Amount	% of Total	Amount	% of Total
State receivables	\$ 269,594	73.13%	\$ 239,270	76.45%
Federal receivables	92,727	25.16%	61,790	19.75%
All other receivables	6,306	1.71%	11,899	3.80%
Total accounts receivable	<u>\$ 368,627</u>	<u>100.00%</u>	<u>\$ 312,959</u>	<u>100.00%</u>
Concentrations of revenues:	Amount	% of Total	Amount	% of Total
State revenues	\$ 4,255,095	86.17%	\$ 3,453,174	76.81%
Property taxes	590,479	11.96%	585,099	13.01%
Federal revenues	102,904	2.08%	46,763	1.05%
All other revenues	(10,175)	-0.21%	410,632	9.13%
Total revenues	<u>\$ 4,938,303</u>	<u>100.00%</u>	<u>\$ 4,495,668</u>	<u>100.00%</u>

Fifty-one percent of FPSC' employees are members of a bargaining unit, whose agreement with FPCS expires on June 30, 2022.

PARTNERSHIP SCHOOLS OF THE CENTRAL COAST (FPCS)

Notes to the Financial Statements

Fiscal Year Ended June 30, 2022

Note 5 - Fixed Assets

Fixed assets activity for the fiscal years ended June 30, 2022 and 2021, is as follows:

	2021 Beginning Balance	Additions	2021 Ending Balance	Additions	2022 Ending Balance
Software	\$ 12,796	\$ -	\$ 12,796	\$ -	\$ 12,796
Less: Accumulated depreciation	(12,796)		(12,796)		(12,796)
Net fixed assets	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>

Note 6 - Operating Leases

FPCS leases space for learning centers and the administrative office, and copier equipment under operating lease agreements that mature during the next four fiscal years. The leases require monthly rental payments of \$30,188. Building space leases may be extended at lease end. Rent expense for the leases totaled \$388,069 and \$385,165 for the fiscal years ended June 30, 2022 and 2021, respectively.

Note 7 - Retirement Plans

State Teachers' Retirement System (STRS)

Plan description

FPCS contributes to STRS, a cost-sharing multiple-employer public employee retirement system defined pension plan administered by STRS. The Plan provides retirement, disability, and survivor benefits to beneficiaries. Benefit provisions are established by State statutes, as legislatively amended, within the State Teachers' Retirement Law. STRS issues a separate comprehensive annual financial report that includes financial statements and required supplementary information. Copies of STRS' annual financial report may be obtained from STRS, 7667 Folsom Boulevard, Sacramento, California 95826.

Funding policy

Active plan members are required to contribute 10.25% of their salary, and FPCS is required to contribute an actuarially determined rate. The actuarial methods and assumptions used for determining the rate are those adopted by STRS Teachers' Retirement Board. The required employer contribution rate for the fiscal years ended June 30, 2022 was 16.92% and 2021 was 16.20% of annual payroll. The contribution requirements of plan members are established by State statutes. FPCS' contribution to STRS for the fiscal years ended June 30, 2022, 2021, and 2020, totaled \$297,283, \$284,625 and \$290,778 respectively, and equals 100% of the required contribution for those fiscal years. FPCS' contributions does not represent more than five percent of total contributions to the plan. As of June 30, 2022, the plan was 87.21% funded.

California Public Employees' Retirement System (CalPERS)

Plan description

FPCS contributes to the School Employer Pool under CalPERS, a cost-sharing multiple-employer public employee retirement system defined benefit pension plan administered by CalPERS. The Plan provides retirement and disability benefits, annual cost-of-living adjustments, and death benefits to plan members and beneficiaries. Benefit provisions are established by State statutes, as legislatively amended, within the Public Employees' Retirement Law. CalPERS issues a separate comprehensive annual financial report that includes financial statements and required supplementary information. Copies of CalPERS' annual financial report may be obtained from the CalPERS Executive Office, 400 P Street, Sacramento, California 95815.

PARTNERSHIP SCHOOLS OF THE CENTRAL COAST (FPCS)

Notes to the Financial Statements

Fiscal Year Ended June 30, 2022

Note 7 - Retirement Plans (continued)

Funding policy

Active plan members are required to contribute 7% of their salary and FPCS is required to contribute an actuarially determined rate. The actuarial methods and assumptions used for determining the rate are those adopted by CalPERS Board of Administration. The required employer contribution rate for the fiscal year ended June 30, 2022, was 22.91% and for the fiscal year ended 2021 was 22.91% of annual payroll. The contribution requirements of plan members are established by State statutes. FPCS' contribution to CalPERS for the fiscal years ended June 30, 2022, 2021, 2020, totaled \$56,849, \$59,584, and \$53,995, respectively, and equals 100% of the required contribution for those fiscal years. FPCS' contributions do not represent more than five percent of total contributions to the plan. As of June 30, 2022, the plan was 82% funded.

Note 8 - Contingencies

State and federal awards, contracts, and grants

FPCS received state and federal funds for specific purposes that are subject to compliance requirements by the funding agencies, noncompliance with which could result in reimbursements of all, or portions of, these funds to the funding government agencies.

Litigation

According to PSCC's staff and attorney, no contingent liabilities are outstanding, and no lawsuits are pending of any significant financial consequence.

Note 9 - Net Assets with Donor Restrictions

Net assets with donor restrictions consist of an amount received from the State of California for the California Clean Energy Jobs Act (Prop 39).

Note 10 - Subsequent Events

Management has evaluated subsequent events through the date of the financial statement which is December XX, 2022

Note 11 - Prior Period Adjustment

A prior period adjustment of \$(54,285) was recorded to adjust receivables from the prior period.

SUPPLEMENTARY INFORMATION SECTION

PARTNERSHIP SCHOOLS OF THE CENTRAL COAST (FPCS)

Organization

June 30, 2022

Charter School Name: Partnership Schools of the Central Coast (FPCS)

Charter Number Authorized by the State: 0763

Date of Granted Charter: May 15, 2006

Granting Authority: Blochman Union School District

Governing Board

Name	Title	Term Expires
Jillian Harmon	Chairman	2023
Laura Gonzalez	Secretary	2024
Maureen Soderberg	Trustee	2023
Eric Riddiough	Trustee	2023
Narded Eguiluz	Trustee	2023

Administration

Name	Title
Stephanie Eggert	Executive Director
Andrea Drake	Director of Business Operations
Michele Duston	Executive Secretary/Registrar

PARTNERSHIP SCHOOLS OF THE CENTRAL COAST (FPCS)

Schedule of Average Daily Attendance

Fiscal Year Ended June 30, 2022

	Second Period Report	Annual Report
Elementary		
Kindergarten through third	99.74	99.55
Fourth through sixth	75.97	73.81
Seventh and eighth	69.84	71.02
Elementary totals	245.55	244.38
Secondary:		
Regular class	159.50	162.85
Secondary totals	159.50	162.85
ADA totals	405.05	407.23

Average daily attendance is a measurement of the number of pupils attending classes of the FPCS. The purpose of attendance accounting from a fiscal standpoint, is to provide the basis on which apportionments of State funds are made to schools. This schedule provides information regarding the attendance of students at various grade levels and in different programs. All attendance reported above is non-classroom based.

There were no audit findings which resulted in necessary revisions to attendance.



**INDEPENDENT AUDITORS' REPORT ON INTERNAL CONTROL OVER FINANCIAL
REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN
AUDIT OF FINANCIAL STATEMENTS PERFORMED IN
ACCORDANCE WITH GOVERNMENT AUDITING STANDARDS**

Governing Board
Partnership Schools of the Central Coast
Operating as Family Partnership Charter School ("FPCS")
Orcutt, California

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of Partnership Schools of the Central Coast (the Schools), a nonprofit organization, as of and for the year ended June 30, 2022, and the related notes to the financial statements, which collectively comprise the Schools' basic financial statements, and have issued our report thereon dated December 12, 2022.

Report on Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered the Schools' internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinions on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Schools' internal control. Accordingly, we do not express an opinion on the effectiveness of the FPCS' internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or, significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses or significant deficiencies may exist that have not been identified.

Report on Compliance and Other Matters

As part of obtaining reasonable assurance about whether the Schools' financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statement. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Moss, Remy & Hargheim LLP

Santa Maria, California
December 12, 2022

INDEPENDENT AUDITORS' REPORT ON STATE COMPLIANCE

Governing Board
Partnership Schools of the Central Coast
Operating as Family Partnership Charter School ("FPCS")
Orcutt, California

Report on State Compliance

Opinion

We have audited the Partnership Schools of the Central Coast's (FPCS) compliance with the types of compliance requirements described in the *2021-2022 Guide for Annual Audits of California K-12 Local Educational Agencies and State Compliance Reporting*, prescribed by Title 5, *California Code of Regulations*, Section 19810 that could have a direct and material effect on each of Partnership Schools of the Central Coast's state programs identified below for the fiscal year ended June 30, 2022.

In our opinion, Partnership Schools of the Central Coast (FPCS) complied, in all material respects, with the compliance requirements referred to above that could have a direct and material effect on the state compliance.

Basis for Opinion

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America, the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States, and the *2021-2022 Guide for Annual Audits of California K-12 Local Educational Agencies and State Compliance Reporting*, prescribed by Title 5, *California Code of Regulations*, Section 19810. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of Compliance section of our report.

We are required to be independent of Partnership Schools of the Central Coast (FPCS) and to meet our ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion. Our audit does not provide a legal determination of Partnership Schools of the Central Coast (FPCS) compliance with the compliance requirements referred to above.

Responsibilities of Management for Compliance

Management is responsible for compliance with the requirements referred to above, and for the design, implementation, and maintenance of effective internal control over compliance with the requirements of laws, statutes, regulations, rules, and provisions of contracts or grant agreements applicable to its state programs.

Auditor's Responsibilities for the Audit of Compliance

Our objectives are to obtain reasonable assurance about whether the material noncompliance with the compliance requirements referred to above occurred, whether due to fraud or error, and express an opinion on Partnership Schools of the Central Coast (FPCS)'s compliance based on our audit. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS, *Government Auditing Standards*, and the *2021-2022 Guide for Annual Audits of California K-12 Local Educational Agencies and State Compliance Reporting* will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions misrepresentations, or the override of internal controls. Noncompliance with the compliance requirements referred to above is considered material if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgement made by a reasonable user of the report on compliance about Partnership Schools of the Central Coast (FPCS)'s compliance with the requirements of the state programs as a whole.

In performing an audit in accordance with GAAS, *Government Auditing Standards*, and the *2021-2022 Guide for Annual Audits of California K-12 Local Educational Agencies and State Compliance Reporting*, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit;
- Identify and assess the risks of material noncompliance, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding Partnership Schools of the Central Coast (FPCS)'s compliance with the compliance requirements referred to above and performing such other procedures as we consider necessary in the circumstances;
- Obtain an understanding of Partnership Schools of the Central Coast (FPCS)'s internal control over compliance relevant to the audit in order to design audit procedures that are appropriate in the circumstances, and to test and report on internal control over compliance in accordance with the *2021-2022 Guide for Annual Audits of California K-12 Local Educational Agencies and State Compliance Reporting*, but not for the purpose of expressing an opinion on the effectiveness of the Partnership Schools of the Central Coast (FPCS)'s internal control. Accordingly, we express no such opinion; and
- Select and test transactions and records to determine Partnership Schools of the Central Coast (FPCS)'s compliance with the state laws and regulations applicable to the following items:

<u>Compliance Requirements</u>	<u>Procedures Performed</u>
LOCAL EDUCATION AGENCIES OTHER THAN CHARTER SCHOOLS:	
Attendance accounting:	
Attendance reporting	Not applicable
Teacher certification and misassignments	Not applicable
Kindergarten continuance	Not applicable
Independent study	Not applicable
Continuation education	Not applicable
Instructional Time	Not applicable
Instructional Materials	Not applicable
Ratios of Administrative Employees to Teachers	Not applicable
Classroom Teacher Salaries	Not applicable
Early Retirement Incentive	Not applicable
GANN Limit Calculation	Not applicable
School Accountability Report Card	Not applicable
Juvenile Court Schools	Not applicable
Middle or Early College High Schools	Not applicable
K-3 Grade Span Adjustment	Not applicable
Transportation Maintenance of Effort	Not applicable
Apprenticeship, Related and Supplemental Instruction	Not applicable
Comprehensive School Safety Plan	Not applicable
District of Choice	Not applicable
SCHOOL DISTRICTS, COUNTY OFFICES OF EDUCATION, AND CHARTER SCHOOLS:	
California Clean Energy Jobs Act	Not applicable
After/Before School Education and Safety Program	Not applicable
Proper Expenditure of Education Protection Account Funds	Yes
Unduplicated Local Control Funding Pupil Counts	Yes
Local Control and Accountability Plan	Not applicable
Independent Study- Course Based	Not applicable
Immunizations	Not applicable
Educator Effectiveness	Not applicable
Expanded Learning Opportunities Grant (ELO-G)	Not applicable
Career Technical Education Incentive Grant	Not applicable
In Person Instruction Grant	Not applicable

<u>Compliance Requirements</u>	<u>Procedures Performed</u>
CHARTER SCHOOLS:	
Attendance	Yes
Mode of Instruction	Not applicable
Nonclassroom-Based Instruction/Independent Study	Yes
Determination of Funding for Nonclassroom-Based Instruction	Yes
Annual Instruction Minutes – Classroom Based	Not applicable
Charter School Facility Grant Program	Not applicable

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and any significant deficiencies and material weaknesses in internal control over compliance that we identify during the audit.

Other Matters

The results of our auditing procedures disclosed an instance of noncompliance with the statutory requirements for programs noted above, which are required to be reported in accordance with the *2021-2022 Guide for Annual Audits of California K-12 Local Educational Agencies and State Compliance Reporting*, prescribed by Title 5, *California Code of Regulations*, Section 19810 which is described in the accompanying Schedule of Findings and Questioned Costs as item 2022-1. Our opinion is not modified with respect to this matter.

Partnership Schools of the Central Coast (FPCS)'s Response to Finding

Partnership Schools of the Central Coast (FPCS)'s response to the findings identified in our audit are described in the accompanying schedule of findings and questioned costs. The Partnership Schools of the Central Coast's response was not subjected to the auditing procedures applied in the audit of the financial statements and, accordingly, we express no opinion on it.

Internal Control over Compliance

A deficiency in internal control over compliance exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance on a timely basis. *A material weakness in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that a material noncompliance with a compliance requirement will not be prevented, or detected and corrected, on a timely basis. *A significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention from those charged with governance.

Our consideration of internal control over compliance was the limited purpose described in the Auditor's Responsibilities for the Audit of Compliance section above and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies in internal control over compliance. Given these limitations, during our audit, we did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses, as defined above. However, material weaknesses or significant deficiencies in internal control over compliance may exist that were not identified.

Our audit was not designed for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, no such opinion is expressed.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the *2021-2022 Guide for Annual Audits of California K-12 Local Educational Agencies and State Compliance Reporting*. Accordingly, this report is not suitable for any other purpose.

Moss, Remy & Hargheim LLP

Santa Maria, California
December 12, 2022

The term "not applicable" is used above to mean either Partnership Schools of the Central Coast (FPCS) did not offer the program during the current fiscal year or the program applies to a different type of local education agency.

FINDINGS AND RECOMMENDATIONS SECTION

PARTNERSHIP SCHOOLS OF THE CENTRAL COAST (FPCS)
Schedule of Audit Findings and Questioned Costs
Fiscal Year Ended June 30, 2022

Section I - Summary of Auditors' Results

Financial Statements

Type of auditors' report issued:	Unmodified		
Internal control over financial reporting:			
Material weaknesses identified?	_____ Yes	_____ ✓	No
Significant deficiencies identified not considered to be material weaknesses?	_____ Yes	_____ ✓	None reported
Noncompliance material to financial statements noted?	_____ Yes	_____ ✓	No

State Awards

Any audit findings disclosed that are required to be reported in accordance with Standards and Procedures for Audits of California K-12 Local Education Agencies?	_____ ✓	Yes	_____	No
Type of auditors' report issued on compliance for state programs:	Unmodified			

PARTNERSHIP SCHOOLS OF THE CENTRAL COAST (FPCS)

Schedule of Audit Findings and Questioned Costs

June 30, 2022

Section II – Financial Statements Findings

There were no financial statement findings or questioned costs.

PARTNERSHIP SCHOOLS OF THE CENTRAL COAST (FPCS)

Schedule of Audit Findings and Questioned Costs

June 30, 2022

Section III - State Award Findings and Questioned Costs**FINDING 2022-1****Unduplicated Local Control Funding Formula Pupil Counts****40000****Criteria:**

In accordance with Education Code Section 42238.02, Charter Schools should provide accurate California Longitudinal Pupil Achievement Data System (CALPADS) to report aggregate English learner, foster youth, and free or reduce-price meal eligibility pupil data according to regulations prescribed by the State Board of Education.

Condition:

In testing pupils on the above report, it was noted that three students did not qualify for FRPM. During the initial testing, we found two instances of non-compliance. We then tested the entire sample and found one more instance of non-compliance for a total of three.

Cause:

Organization oversight.

Repeat Finding:

No

Effect:

FPCS over reported the Schools' unduplicated pupil count by three.

School	Charter School's Enrollment Count	Certified Total Unduplicated Pupil Count	Unduplicated Count Adjustment Based on Eligibility for:			Adjusted Total Unduplicated Pupil Count	Adjusted Charter School's Enrollment Count
			FRPM	EL Funding	FRPM and EL		
Family Partnership Charter	407	149	-3	0	0	146	407
Total	407	149	-3	0	0	146	407

Questioned Costs: \$1,860

Recommendation:

FPCS should review the free or reduced priced meal eligibility applications to ensure that supporting documentation matches the information submitted on the CALPADS report.

School's Corrective Action Plan:

FPCS has established a protocol for clerical staff to compare information received from parents/guardians with CALPADS before updating our school's student information system that links reports to CALPADS.

PARTNERSHIP SCHOOLS OF THE CENTRAL COAST (FPCS)

Schedule of Prior Year Audit Findings and Questioned Costs

June 30, 2022

Section II – Financial Statements Findings

There were no prior year financial statement findings or questioned costs.

PARTNERSHIP SCHOOLS OF THE CENTRAL COAST (FPCS)

Schedule of Prior Year Audit Findings and Questioned Costs

June 30, 2022

Section III - State Award Findings and Questioned Costs**FINDING 2021-1****Unduplicated Local Control Funding Formula Pupil Counts****40000****Criteria:**

In accordance with Education Code Section 42238.02, Charter Schools should provide accurate California Longitudinal Pupil Achievement Data System (CALPADS) to report aggregate English learner, foster youth, and free or reduce-price meal eligibility pupil data according to regulations prescribed by the State Board of Education.

Condition:

In testing pupils on the above report, it was noted that four students did not qualify for FRPM.

Cause:

Organization oversight.

Effect:

Partnership Schools over reported the School's unduplicated pupil county by four.

School	Charter School's Enrollment Count	Certified Total Unduplicated Pupil Count	Unduplicated Count Adjustment <u>Based on Eligibility for:</u>			Adjusted Total Unduplicated Pupil Count	Adjusted Charter School's Enrollment Count
			FRPM	EL Funding	FRPM and EL		
Family Partnership Charter	481	164	-4	0	0	160	477
Total	481	164	-4	0	0	160	477

Questioned Costs: \$2,219**Recommendation:**

FPCS should review the free or reduced priced meal eligibility applications to ensure that supporting documentation matches the information submitted on the CALPADS report.

School's Corrective Action Plan:

FPCS has established a protocol for clerical staff to compare information received from parents/guardians with CALPADS before updating our school's student information system that links reports to CALPADS.

Current Status:

Not implemented

VII – A

**4269112 Blochman
Union Elem District**4949 Foxen Canyon Rd., Santa Maria, CA 93454-9666
Generated on 01/03/2023 10:45:02 AM Page 1 of 1**Attendance/Membership Summary Report**Start/End Date: 12/01/2022 - 12/31/2022 School(s): 1 Calendar(s): 2
Grade: 5, 6, 7, 8, K, 1, 2, 3, 4, TK**SUMMARY Total Schools: 1 Total Calendars: 2**

	Student Membership			Absent Days	Present Days	ADM	ADA	Unexcused Absences		Percent In Attendance
	Grade	Count	Days					Days	Avg. Daily	
	5	23	276	4	272	23.00	22.67	1	0.08	98.55%
	6	23	276	11	265	23.00	22.08	2	0.17	96.01%
	7	19	228	12	216	19.00	18.00	0	0.00	94.74%
	8	26	310	25	285	25.83	23.75	2	0.17	91.94%
	K	13	156	10	146	13.00	12.17	0	0.00	93.59%
	1	24	288	23	265	24.00	22.08	2	0.17	92.01%
	2	18	207	22	185	17.25	15.42	4	0.33	89.37%
	3	21	252	12	240	21.00	20.00	1	0.08	95.24%
	4	21	252	14	238	21.00	19.83	3	0.25	94.44%
	TK	3	36	1	35	3.00	2.92	0	0.00	97.22%
Total	10	191	2281	134	2147	190.08	178.92	15	1.25	94.13%

School: Benjamin Foxen School Calendar: 22-23 Blochman 5-8

	Student Membership			Absent Days	Present Days	ADM	ADA	Unexcused Absences		Percent In Attendance
	Grade	Count	Days					Days	Avg. Daily	
	5	23	276	4	272	23.00	22.67	1	0.08	98.55%
	6	23	276	11	265	23.00	22.08	2	0.17	96.01%
	7	19	228	12	216	19.00	18.00	0	0.00	94.74%
	8	26	310	25	285	25.83	23.75	2	0.17	91.94%
Total	4	91	1090	52	1038	90.83	86.50	5	0.42	95.23%

School: Benjamin Foxen School Calendar: 22-23 Blochman K-4

	Student Membership			Absent Days	Present Days	ADM	ADA	Unexcused Absences		Percent In Attendance
	Grade	Count	Days					Days	Avg. Daily	
	K	13	156	10	146	13.00	12.17	0	0.00	93.59%
	1	24	288	23	265	24.00	22.08	2	0.17	92.01%
	2	18	207	22	185	17.25	15.42	4	0.33	89.37%
	3	21	252	12	240	21.00	20.00	1	0.08	95.24%
	4	21	252	14	238	21.00	19.83	3	0.25	94.44%
	TK	3	36	1	35	3.00	2.92	0	0.00	97.22%
Total	6	100	1191	82	1109	99.25	92.42	10	0.83	93.12%

VII — B

Principal Apportionment Data Collection (PADC)

Processing Cycle: 2022-23 P-1 , Reporting Period: 2022-23 P-1

Home / Data Entry / School District / Blochman Union Elementary / Attendance School District

Attendance School District

Record Information



Entity Information

County: Santa Barbara
District: Blochman Union Elementary
CDS Code: 42 69112 0000000
Data ID: 9E974287

Details

Last Saved By: nshafer
Last Saved Date: 12/16/2022 12:45:33 PM
Last Validation By: nshafer
Last Validation Date: 12/16/2022 12:46:00 PM

Validation Information

Number of Records: 1
Number of Errors: 0
Number of Warnings: 0
Passed Data Validation: Yes

Certification Information

School District: dbrown1 - 12/16/2022 12:59:14 PM
County Office of Education: None

Regular ADA

Data ID	<div>9E974287</div>				
Does the school district have Transitional Kindergarten (TK) ADA to report?	<div></div>				
YES (include TK ADA on Line A-1 and report TK ADA only on Line B-5)	<div><input checked="" type="checkbox"/></div>	<div></div>	<div></div>	<div></div>	<div></div>
NO	<div><input type="checkbox"/></div>	<div></div>	<div></div>	<div></div>	<div></div>
Regular ADA	TK/K-3	Grades 4-6	Grades 7-8	Grades 9-12	Total

Regular ADA includes Opportunity Classes, Home and Hospital, Special Day Class, and Continuation Education)

Extended Year Special Education [EC 56345 (b)(3)] (Divisor 175)

Special Education - Nonpublic, Nonsectarian Schools [EC 56366 (a)(7)] and/or Nonpublic, Nonsectarian Schools - Licensed Children's Institutions

Extended Year Special Education - Nonpublic, Nonsectarian Schools [EC 56366 (a)(7)] and/or Nonpublic, Nonsectarian Schools - Licensed Children's Institutions (Divisor 175)

Community Day School [EC 48660] (Divisor 70/135/180)

ADA Totals (Sum of A-1 through A-5)

A-1	73.98	64.78	40.48	0	179.24
A-2	0	0	0	0	0
A-3	0	0	0	0	0
A-4	0	0	0	0	0
A-5	0	0	0	0	0
A-6	73.98	64.78	40.48	0	179.24

Other

Independent Study

Full-Time Traditional Independent Study ADA, pursuant to EC 51747, included in Section A or in the Attendance Supplement School District, Attendance Basic Aid Choice/Court-Ordered Voluntary Pupil Transfer, and Attendance Basic Aid Open Enrollment entry screens

Full-Time Traditional Independent Study ADA not eligible for general funding, pursuant to EC 51745.6, and not included in Section A or in the Attendance Supplement School District, Attendance Basic Aid Choice/Court-Ordered Voluntary Pupil Transfer, and Attendance Basic Aid Open Enrollment entry screens

Course Based Independent Study ADA, pursuant to EC 51749.5, included in Section A or in the Attendance Supplement School District, Attendance Basic Aid Choice/Court-Ordered Voluntary Pupil Transfer, and Attendance Basic Aid Open Enrollment entry screens

Course Based Independent Study ADA not eligible for general funding, pursuant to EC 51745.6, and not included in Section A or in the Attendance Supplement School District, Attendance Basic Aid Choice/Court-Ordered Voluntary Pupil Transfer, and Attendance Basic Aid Open Enrollment entry screens

Transitional Kindergarten

ADA for Students in Transitional Kindergarten pursuant to EC 46300 included in Section A (Lines A-1 through A-5, TK/K-3 Column, First Year ADA Only)

	TK/K-3	Grades 4-6	Grades 7-8	Grades 9-12	Total
B-1	0	0	0	0	0
B-2	0	0	0	0	0
B-3	0	0	0	0	0
B-4	0	0	0	0	0
B-5	2.94				2.94

Second Prior Year

Regular ADA (includes Opportunity Classes, Home and Hospital, Special Day Class, and Continuation Education)

Extended Year Special Education [EC 56345 (b)(3)]
(Divisor 175)

C-10	0	0	0	0	0	0
C-11	0	0	0	0	0	0
C-12	0	0	0	0	0	0

ADA Totals [C-10 + C-11]

Prior Year

Regular ADA (includes Opportunity Classes, Home and Hospital, Special Day Class, and Continuation Education)

Extended Year Special Education [EC 56345 (b)(3)]
(Divisor 175)

C-13	0	0	0	0	0	0
C-14	0	0	0	0	0	0
C-15	0	0	0	0	0	0

ADA Totals [C-13 + C-14]

Principal Apportionment Data Collection (PADC)

Processing Cycle: 2022-23 P-1 , Reporting Period: 2022-23 P-1

Home / Data Entry / School District / Blochman Union Elementary / Transfer of Funds Alternative Rate Option

Transfer of Funds Alternative Rate Option

Record Information



Entity Information

County: Santa Barbara
District: Blochman Union Elementary
CDS Code: 42 69112 0000000
Data ID: D20E98FA

Details

Last Saved By: nshafer
Last Saved Date: 12/16/2022 12:39:15 PM
Last Validation By: nshafer
Last Validation Date: 12/16/2022 12:39:44 PM

Validation Information

Number of Records: 1
Number of Errors: 0
Number of Warnings: 0
Passed Data Validation: Yes

Certification Information

School District: dbrown1 - 12/16/2022 1:00:44 PM
County Office of Education: None

COE Selection

Data ID:

D20E98FA

EC Section 4576 requires transfer of funds from the school district of residence to the COE for ADA served by the COE but credited to the district of residence. The transfer shall occur at the rate equal to the school district's LCFF base, supplemental and concentration grant per ADA, unless the COE reports an alternative rate to CDE and selects the types of ADA for transfer at the alternative rate.

To enable the transfer of funds at the alternative rate, the district of residence must select the COE on this screen. **To determine if the COE reported an alternative rate, contact the COE.**

If the school district does not select the COE on this screen, funds will be transferred to the COE at the school district's LCFF base, supplemental and concentration grant per ADA.

School district agrees to transfer funds at the alternative per-ADA rate, as reported by the COE:

Santa Barbara Co. Office of Education

VII – C

Policy 0430: Comprehensive Local Plan For Special Education

Status: DRAFT

Original Adopted Date: 11/14/2017 | **Last Revised Date:** 06/09/2020

The Governing Board recognizes its obligation to provide a free appropriate public education to all individuals with disabilities, aged 3 to 21 years, who reside in the district.

In order to meet the needs of individuals with disabilities, the district shall participate as a member of a Special Education Local Plan Area (SELPA) with other districts and the county office of education pursuant to Education Code 56195.1.

The district shall enter into agreements with other members of the SELPA in accordance with Education Code 56195.1 and 56195.7. Consistent with these agreements, the district shall adopt policies governing the programs and services it operates. (Education Code 56195.8)

The Superintendent or designee shall work with the other members of the SELPA to develop a local plan for the education of individuals with disabilities. The plan shall be approved by the Board and the other members of the SELPA, and shall be submitted to the SPI. (Education Code 56195.1)

Each year, the Superintendent or designee shall provide to the Board any data and/or information regarding the special education funding generated by the district as supplied by the SPI and the SELPA in accordance with Education Code 56836.148.

The local plan shall be reviewed at least once every three years and updated as needed to ensure the information contained in the plan remains relevant and accurate. The local plan shall be updated cooperatively by a committee of representatives of special and regular education teachers and administrators selected by the groups they represent and with participation by parent/guardian members of the community advisory committee, or parents/guardians selected by the community advisory committee, to ensure adequate and effective participation and communication. (Education Code 56195.9)

Special education programs and services shall be reviewed on an ongoing basis. The results of such evaluations shall be used to identify and correct any program deficiencies.

Regulation 0430: Comprehensive Local Plan For Special Education

Status: DRAFT

Original Adopted Date: 11/14/2017 | **Last Revised Date:** 06/09/2020

Definitions

Free appropriate public education (FAPE) means special education and related services that are provided at public expense, under public supervision and direction, and without charge; meet the standards of the California Department of Education, including the requirements of 34 CFR 300.1-300.818; include appropriate preschool, elementary school, or secondary school education for individuals between the ages of 3 and 21; and are provided in conformity with an individualized education program (IEP) that meets the requirements of 34 CFR 300.320-300.324. (Education Code 56040; 34 CFR 300.17, 300.101, 300.104)

Least restrictive environment means that, to the maximum extent appropriate, students with disabilities, including individuals in public or private institutions or other care facilities, be educated with individuals who are nondisabled, including the provision of nonacademic and extracurricular services and activities. Special classes, separate schooling, or other removal of students with disabilities from the regular educational environment occurs only if the nature or severity of the disability is such that education in the regular classes with the use of supplementary aids and services cannot be achieved satisfactorily. (Education Code 56040.1; 34 CFR 300.107, 300.114, 300.117)

Elements of the Local Plan

The local plan developed by the Special Education Local Plan Area (SELPA) shall include, but not be limited to: (Education Code 56122, 56205, 56206)

1. Policies, procedures, and programs, that are consistent with state laws, regulations, and policies and 20 USC 1412(a), 20 USC 1413(a)(1), and 34 CFR 300.201 governing the following:
 - a. Free appropriate public education
 - b. Full educational opportunity
 - c. Child find and referral
 - d. Individualized education programs, including development, implementation, review, and revision
 - e. Least restrictive environment
 - f. Procedural safeguards
 - g. Annual and triennial assessments
 - h. Confidentiality
 - i. Transition from the Infants and Toddlers with Disabilities programs pursuant to 20 USC 1431 to the preschool program
 - j. Children in private schools
 - k. Compliance assurances, including general compliance with the federal Individuals with Disabilities Education Act (20 USC 1400-1482), Section 504 of the federal Rehabilitation Act of 1973 (29 USC 794), the federal Americans with Disabilities Act of 1990 (42 USC 12101-12213), related federal regulations, and Education Code 56000-56865
 - l. A description of the governance and administration of the local plan in accordance with Education Code 56205(a)(12)
 - m. Personnel qualification to ensure that personnel, including special education teachers and personnel and paraprofessionals are appropriately and adequately prepared and trained in accordance with Education Code 56058 and 56070 and 20 USC 1412(a)(14) and 1413(a)(3)

- n. Performance goals and indicators
 - o. Participation in state and districtwide assessments, including assessments described in 20 USC 6301 et seq. and alternate assessments in accordance with 20 USC 1412(a)(16), and reports relating to assessments
 - p. Supplementation of state, local, and other federal funds, including nonsupplantation of funds
 - q. Maintenance of financial effort
 - r. Opportunities for public participation before adoption of policies and procedures
 - s. Suspension and expulsion rates
 - t. Access to instructional materials by blind individuals with exceptional needs and others with print disabilities in accordance with 20 USC 1412(a)(23)
 - u. Overidentification and disproportionate representation by race and ethnicity of children as individuals with exceptional needs, including children with disabilities with a particular impairment described in 20 USC 1401 and 1412(a)(24)
 - v. Prohibition of mandatory medication use pursuant to Education Code 56040.5 and 20 USC 1412(a)(25)
2. An annual budget plan, including descriptions of the SELPA's allocation plan in accordance with Education Code 56836-56845, all revenues by revenue source received by the SELPA specifically for the purpose of special education, a breakdown of the distribution of funds to each LEA within the SELPA, projected total special education expenditures by each LEA, projected total expenditures by the SELPA and the LEAs within the SELPA, projected funding to be received specifically for regionalized operations, and a breakdown of projected SELPA operating expenditures
 3. An annual service plan, describing the services to be provided by each LEA, regardless of whether the LEA participates in the local plan, including the nature of the services and the physical location at which the services will be provided. This description shall demonstrate that all individuals with exceptional needs shall have access to services and instruction appropriate to meet their needs as specified in their individualized education programs.
 4. Beginning July 1, 2027, an annual assurances support plan to demonstrate how the SELPA and its participating agencies are coordinating for purposes of assuring effective outcomes for students with disabilities, including a description of:
 - a. Support the governing board of the SELPA will provide to participating agencies in achieving the goals, actions, and services identified in their local control and accountability plans
 - b. The ways in which the governing board of the SELPA will connect participating agencies in need of technical assistance to the statewide system of support
 - c. The services, technical assistance, and support the governing board of the SELPA will provide to meet the required policies, procedures, and programs specified in Education Code 56205
 5. A description of programs for early childhood special education from birth through five years of age
 6. A description of the method by which members of the public, including parents/guardians of individuals with exceptional needs who are receiving services under the plan, may address questions or concerns pursuant to Education Code 56205
 7. A description of a dispute resolution process, including mediation and arbitration to resolve disputes over the distribution of funding, the responsibility for service provision, and the other governance activities specified within the local plan
 8. Verification that the plan has been reviewed by the community advisory committee in accordance with

Education Code 56205 and that the committee had at least 30 days to conduct this review before submission of the local plan to CDE

9. A description of the process being utilized to refer students for special education instruction pursuant to Education Code 56303
10. A description of the process being utilized to oversee and evaluate placements in nonpublic, nonsectarian schools, the method of ensuring that all requirements of each student's IEP are being met, and a method for evaluating whether the student is making appropriate educational progress
11. A description of how specialized equipment and services will be distributed within the local plan area in a manner that minimizes the necessity to serve students in isolated sites and maximizes the opportunities to serve students in the least restrictive environment

The local plan, annual budget plan, annual service plan, and annual assurances support plan shall be written in language that is understandable to the general public. They shall be adopted at a public hearing of the SELPA, for which notice of the hearing shall be posted in each school in the SELPA at least 15 days before the hearing. (Education Code 56205)

Availability of the Plan

The Superintendent or designee shall post on the district's web site the approved local plan, annual budget plan, annual service plan, and annual assurances support plan and any updates or revisions to the plans. A complete copy of the local plan, annual budget plan, annual service plan, annual assurances support plan, and policies and procedures shall be held on file in the district office and shall be accessible to any interested party. (Education Code 56205.5)

Policy 0450: Comprehensive Safety Plan

Status: DRAFT

Original Adopted Date: 11/14/2017 | **Last Revised Date:** 12/10/2019

The Governing Board recognizes that students and staff have the right to a safe and secure campus where they are free from physical and psychological harm. The Board is fully committed to maximizing school safety and to creating a positive learning environment that includes strategies for violence prevention and high expectations for student conduct, responsible behavior, and respect for others.

The Superintendent or designee shall oversee the development of a districtwide comprehensive safety plan that is applicable to each school site. (Education Code 32281)

The comprehensive safety plan(s) shall be reviewed and updated by March 1 of each year and forwarded to the Board for approval. (Education Code 32286, 32288)

The Board shall review the comprehensive safety plan(s) in order to ensure compliance with state law, Board policy, and administrative regulation and shall approve the plan(s) at a regularly scheduled meeting.

By October 15 of each year, the Superintendent or designee shall notify the California Department of Education (CDE) of any schools that have not complied with the requirements of Education Code 32281. (Education Code 32288)

Tactical Response Plan

Notwithstanding the process described above, any portion of a comprehensive safety plan that addresses tactical responses to criminal incidents that may result in death or serious bodily injury at the school site, including steps to safeguard students and staff, secure affected school premises, and apprehend criminal perpetrator(s), shall be developed by district administrators in accordance with Education Code 32281. In developing such strategies, district administrators shall consult with law enforcement officials and with representative(s) of employee bargaining unit(s), if they choose to participate.

When reviewing the tactical response plan, the Board may meet in closed session to confer with law enforcement officials and approve the tactical response plan, provided that any vote to approve the tactical response plan is announced in open session following the closed session. (Education Code 32281)

Safety Plan(s) Access and Reporting

The Superintendent or designee shall ensure that an updated file of all safety-related plans and materials is readily available for inspection by the public. (Education Code 32282)

However, those portions of the comprehensive safety plan that include tactical responses to criminal incidents shall not be publicly disclosed.

The Superintendent or designee shall share the comprehensive safety plans and any updates to the plans with local law enforcement, the local fire department, and other first responder entities. (Education Code 32281)

The Superintendent or designee shall also provide data to CDE pertaining to lockdown or multi-option response drills conducted at district schools in accordance with Education Code 32289.5. (Education Code 32289.5)

Regulation 0450: Comprehensive Safety Plan

Status: DRAFT

Original Adopted Date: 11/14/2017 | **Last Revised Date:** 12/10/2019

Development and Review of Comprehensive School Safety Plan

The school site council shall consult with local law enforcement, the local fire department, and other first responders in the writing and development of the comprehensive school safety plan. When practical, the school site council shall also consult with other school site councils and safety planning committees. (Education Code 32281, 32282)

The school site council may delegate the responsibility for developing a comprehensive safety plan to a school safety planning committee composed of the following members: (Education Code 32281)

1. The principal or designee
2. One teacher who is a representative of the recognized certificated employee organization
3. One parent/guardian whose child attends the school
4. One classified employee who is a representative of the recognized classified employee organization
5. Other members, if desired

Before adopting the comprehensive safety plan, the school site council or school safety planning committee shall hold a public meeting at the school in order to allow members of the public the opportunity to express an opinion about the plan. (Education Code 32288)

The school site council or safety planning committee shall notify, in writing, the following persons and entities of the public meeting: (Education Code 32288)

1. The local mayor
2. A representative of the local school employee organization
3. A representative of each parent/guardian organization at the school, including the parent teacher association and parent teacher clubs
4. A representative of each teacher organization at the school
5. A representative of the school's student body government
6. All persons who have indicated that they want to be notified

In addition, the school site council or safety planning committee may notify, in writing, the following entities of the public meeting: (Education Code 32288)

1. Representatives of local religious organizations
2. Local civic leaders
3. Local business organizations

Content of the Safety Plan

Each comprehensive safety plan shall include an assessment of the current status of any crime committed on campus and at school-related functions. (Education Code 32282)

The assessment may include, but not be limited to, reports of crime, suspension and expulsion rates, and surveys of students, parents/guardians, and staff regarding their perceptions of school safety.

The plan shall identify appropriate strategies and programs that will provide or maintain a high level of school safety and address the school's procedures for complying with existing laws related to school safety, including all of the following: (Education Code 32282)

1. Child abuse reporting procedures consistent with Penal Code 11164-11174.3
2. Routine and emergency disaster procedures including, but not limited to:
 - a. Adaptations for students with disabilities in accordance with the Americans with Disabilities Act
 - b. An earthquake emergency procedure system in accordance with Education Code 32282
 - c. A procedure to allow public agencies, including the American Red Cross, to use school buildings, grounds, and equipment for mass care and welfare shelters during disasters or other emergencies affecting the public health and welfare
3. Policies pursuant to Education Code 48915(d) for students who commit an act listed in Education Code 48915(c) and other school-designated serious acts that would lead to suspension, expulsion, or mandatory expulsion recommendations
4. Procedures to notify teachers of dangerous students pursuant to Education Code 49079
5. A policy consistent with the prohibition against discrimination, harassment, intimidation, and bullying pursuant to Education Code 200-262.4
6. If the school has adopted a dress code prohibiting students from wearing "gang-related apparel" pursuant to Education Code 35183, the provisions of that dress code and the definition of "gang-related apparel"
7. Procedures for safe ingress and egress of students, parents/guardians, and employees to and from school
8. A safe and orderly school environment conducive to learning
9. The rules and procedures on school discipline adopted pursuant to Education Code 35291 and 35291.5
10. Procedures for conducting tactical responses to criminal incidents, including procedures related to individuals with guns on campus and at school-related functions

Among the strategies for providing a safe environment, the comprehensive safety plan may also include:

1. Development of a positive school climate that promotes respect for diversity, personal and social responsibility, effective interpersonal and communication skills, self-esteem, anger management, and conflict resolution
2. Disciplinary policies and procedures that contain prevention strategies, such as strategies to prevent bullying, hazing, and cyberbullying, as well as behavioral expectations and consequences for violations
3. Strategies aimed at preventing potential incidents involving crime and violence on school campuses, including vandalism, drug and alcohol abuse, gang membership and violence, hate crimes, bullying, including bullying committed personally or by means of an electronic act, teen relationship violence, and discrimination and harassment, including sexual harassment
4. Curriculum that emphasizes prevention and alternatives to violence, such as multicultural education and literacy, character/values education, social and emotional learning, media analysis skills, conflict resolution, community service learning, and education related to the prevention of dating violence
5. Parent/guardian involvement strategies, including strategies to help ensure parent/guardian support and reinforcement of the school's rules and increase the number of adults on campus
6. Provision of safety materials and emergency communications in language(s) understandable to

parents/guardians

7. Annual notification to parents/guardians related to the safe storage of firearms
8. Prevention and intervention strategies related to the sale or use of drugs and alcohol which shall reflect expectations for drug-free schools and support for recovering students
9. Collaborative relationships among the city, county, community agencies, local law enforcement, the judicial system, and the schools that lead to the development of a set of common goals and community strategies for violence prevention instruction
10. District policy prohibiting the possession of firearms and ammunition on school grounds
11. Measures to prevent or minimize the influence of gangs on campus
12. Procedures for receiving verification from law enforcement when a violent crime has occurred on school grounds and for promptly notifying parents/guardians and employees of that crime
13. Procedures for the early identification and threat assessment of, and appropriate response to, suspicious and/or threatening digital media content
14. Assessment of the school's physical environment, including a risk management analysis and development of ground security measures such as procedures for closing campuses to outsiders, installing surveillance systems, securing the campus perimeter, protecting buildings against vandalism, and providing for a law enforcement presence on campus
15. Independent security assessment of the school's network infrastructure and selected web applications to identify vulnerabilities and provide recommendations to improve cybersecurity
16. Guidelines for the roles and responsibilities of mental health professionals, athletic coaches, community intervention professionals, school counselors, school resource officers, and police officers on school campuses. Guidelines may include, but are not limited to, the following:
 - a. Strategies to create and maintain a positive school climate, promote school safety, and increase student achievement
 - b. Strategies to prioritize mental health and intervention services, restorative and transformative justice programs, and positive behavior interventions and support
 - c. Protocols to address the mental health care of students who have witnessed a violent act at any time, including, but not limited to, while on school grounds, while coming or going from school, during a lunch period whether on or off campus, or during or while going to or coming from a school-sponsored activity
17. Strategies for suicide prevention and intervention
18. District policy and/or plan related to pandemics
19. Procedures to implement when a person interferes with or disrupts a school activity, remains on campus after having been asked to leave, or creates a disruption with the intent to threaten the immediate physical safety of students or staff
20. Crisis prevention and intervention strategies, which may include the following:
 - a. Identification of possible crises that may occur, determination of necessary tasks that need to be addressed, and development of procedures relative to each crisis, including the involvement of law enforcement and other public safety agencies as appropriate
 - b. Threat assessment strategies to determine the credibility and seriousness of a threat and provide appropriate interventions for the potential offender(s)
 - c. Assignment of staff members responsible for each identified task and procedure

- d. Development of an evacuation plan based on an assessment of buildings and grounds and opportunities for students and staff to practice the evacuation plan
 - e. Coordination of communication to schools, Governing Board members, parents/guardians, and the media
 - f. Communication with parents/guardians of reunification plans and the necessity of cooperating with first responders
 - g. Development of a method for the reporting of violent incidents
 - h. Development of follow-up procedures that may be required after a crisis has occurred, such as counseling
- 21. Training on assessment and reporting of potential threats, violence prevention, and intervention techniques. Such training shall include preparation to implement the elements of the safety plan
 - 22. Environmental safety strategies, including, but not limited to, procedures for preventing and mitigating exposure to toxic pesticides, lead, asbestos, vehicle emissions, and other hazardous substances and contaminants
 - 23. Continuity of operations procedures to ensure that the district's essential functions are not disrupted during an emergency, to the extent possible

Policy 0460: Local Control And Accountability Plan

Status: DRAFT

Original Adopted Date: 11/14/2017 | **Last Revised Date:** 12/10/2019

The Governing Board desires to ensure the most effective use of available funding to improve outcomes for all students. A comprehensive, data-driven planning process shall be used to identify annual goals and specific actions which are aligned with the district budget and facilitate continuous improvement of district practices.

The Board shall adopt a districtwide local control and accountability plan (LCAP), based on the template adopted by the State Board of Education (SBE), that addresses the state priorities in Education Code 52060 and any local priorities adopted by the Board. The LCAP shall be updated on or before July 1 of each year and, like the district budget, shall cover the next fiscal year and two subsequent fiscal years. (Education Code 52060, 52064; 5 CCR 15494-15497)

The LCAP shall focus on improving outcomes for all students, particularly those who are "unduplicated students" or are part of any numerically significant student subgroup that is at risk of or is underperforming.

Unduplicated students include students who are eligible for free or reduced-price meals, English learners, and foster youth, as defined in Education Code 42238.01 for purposes of the local control funding formula (LCFF). (Education Code 42238.02)

Numerically significant student subgroups include ethnic subgroups, socioeconomically disadvantaged students, English learners, students with disabilities, foster youth, and homeless students, when there are at least 30 students in the subgroup or at least 15 foster youth or homeless students. (Education Code 52052)

Beginning July 1, 2025, if the district is identified by the California Department of Education (CDE) as needing an improvement plan pursuant to 34 CFR 300.600-300.647, the Board shall adopt, and update on an annual basis, an Individual with Disabilities Education Act (IDEA) Addendum, based on the template adopted by SBE. However, if the district adopts an improvement plan after being identified, but before July 1, 2025, the IDEA Addendum shall be developed upon expiration of the adopted improvement plan, but no later than July 1, 2028, whichever occurs first. The IDEA addendum shall be developed, reviewed, and approved in conjunction with and in the same manner as the LCAP and the annual update to the LCAP, and shall be submitted to CDE within 15 days of adoption by the Board. (Education Code 52064.3)

The Superintendent or designee shall review the school plan for student achievement (SPSA) submitted by each district school pursuant to Education Code 64001 to ensure that the specific actions included in the LCAP are consistent with strategies included in the SPSA. (Education Code 52062)

The LCAP shall also be aligned with other district and school plans, to the extent possible, in order to minimize duplication of effort and provide clear direction for program implementation.

As part of the LCAP adoption and annual update to the LCAP, the Board shall separately adopt an LCFF budget overview for parents/guardians, based on the template developed by SBE, which includes specified information relating to the district's budget. The budget overview shall be adopted, reviewed, and approved in the same manner as the LCAP and the annual update. (Education Code 52064.1)

Any complaint that the district has not complied with legal requirements pertaining to the LCAP may be filed pursuant to AR 1312.3 - Uniform Complaint Procedures. (Education Code 52075)

Plan Development

The Superintendent or designee shall gather data and information needed for effective and meaningful plan development and present it to the Board and community. Such data and information shall include, but not be limited to, data regarding the number of students in student subgroups, disaggregated data on student achievement levels, and information about current programs and expenditures.

The Board shall consult with teachers, principals, administrators, other school personnel, employee bargaining units, parents/guardians, and students in developing the LCAP. Consultation with students shall enable unduplicated students and other numerically significant student subgroups to review and comment on LCAP development and may include surveys of students, student forums, student advisory committees, and/or meetings with student government bodies or other groups representing students. (Education Code 52060; 5 CCR 15495)

Public Review and Input

The Board shall establish a parent advisory committee to provide advice on the LCAP. The committee shall be composed of a majority of parents/guardians and shall include parents/guardians of unduplicated students as defined above and parents/guardians of students with disabilities. (Education Code 52063; 5 CCR 15495)

Beginning July 1, 2024, unless a student advisory committee is established to provide advice to the Board and Superintendent, two students shall be included as full members of the parent advisory committee. The students shall serve for a renewable term of one full school year. (Education Code 52063)

Student members of the parent advisory committee or the student advisory committee shall represent the diversity of the district's students, including geographical, socioeconomic, cultural, physical, and educational diversity, and particular effort shall be made to reach out to at-risk or disadvantaged students to serve as members of such committees. (Education Code 52063)

Whenever district enrollment includes at least 15 percent English learners, with at least 50 students who are English learners, the Board shall establish an English learner parent advisory committee composed of a majority of parents/guardians of English learners to review and comment on the LCAP. (Education Code 52063; 5 CCR 15495)

The Superintendent or designee shall present the LCAP to the committee(s) before it is submitted to the Board for adoption, and shall respond in writing to comments received from the committee(s).

The Superintendent or designee shall notify members of the public of the opportunity to submit written comments regarding the specific actions and expenditures proposed to be included in the LCAP. The notification shall be provided using the most efficient method of notification possible, which may not necessarily include producing printed notices or sending notices by mail. All written notifications related to the LCAP shall be provided in the primary language of parents/guardians when required by Education Code 48985. (Education Code 52062)

As part of the parent/guardian and community engagement process, the district shall solicit input on effective and appropriate instructional methods, including, but not limited to, establishing language acquisition programs to enable all students, including English learners and native English speakers, to have access to the core academic content standards and to become proficient in English. (Education Code 305-306)

The Superintendent or designee shall consult with the administrator(s) of the special education local plan area of which the district is a member to ensure that specific actions for students with disabilities are included in the LCAP and are consistent with strategies included in the annual assurances support plan for the education of students with disabilities. (Education Code 52062)

The Board shall hold at least one public hearing to solicit the recommendations and comments of members of the public regarding the specific actions and expenditures proposed to be included in the LCAP. The public hearing shall be held at the same meeting as the budget hearing required pursuant to Education Code 42127 and AR 3100 - Budget. (Education Code 42127, 52062)

Adoption of the Plan

The Board shall adopt the LCAP prior to adopting the district budget, but at the same public meeting. This meeting shall be held after the public hearing described above, but not on the same day as the hearing. (Education Code 52062)

The Board may adopt revisions to the LCAP at any time during the period in which the plan is in effect, provided the Board follows the process to adopt the LCAP pursuant to Education Code 52062 and the revisions are adopted in a public meeting. (Education Code 52062)

Submission of Plan to County Superintendent of Schools

Not later than five days after adoption of the LCAP, the district budget, and the budget overview for parents/guardians, the Board shall file the LCAP, the budget, and the budget overview with the County Superintendent of Schools. (Education Code 42127, 52064.1, 52070)

If the County Superintendent sends, by August 15, a written request for clarification of the contents of the LCAP, the Board shall respond in writing within 15 days of the request. If the County Superintendent then submits recommendations for amendments to the LCAP within 15 days of receiving the Board's response, the Board shall consider those recommendations in a public meeting within 15 days of receiving the recommendations. (Education Code 52070)

If the County Superintendent does not approve the district's LCAP, the Board shall accept technical assistance from the County Superintendent focused on revising the plan so that it can be approved. (Education Code 52071)

Monitoring Progress

The Superintendent or designee shall report to the Board, at least annually in accordance with the timeline and indicators established by the Superintendent and the Board, regarding the district's progress toward attaining each goal identified in the LCAP. Evaluation shall include, but not be limited to, an assessment of district and school performance reported on the California School Dashboard. Evaluation data shall be used to recommend any necessary revisions to the LCAP.

The Superintendent or designee shall seek and/or accept technical assistance or other intervention that may be required pursuant to Education Code 52071 or 52072 when a school or a numerically significant student subgroup is not making sufficient progress toward the goals in the LCAP.

Regulation 0460: Local Control And Accountability Plan

Status: DRAFT

Original Adopted Date: 11/14/2017 | **Last Revised Date:** 12/10/2019

Goals and Actions Addressing State and Local Priorities

The district's local control and accountability plan (LCAP) and annual updates shall include, for the district and each district school: (Education Code 52060)

1. A description of the annual goals established for all students and for each numerically significant subgroup as defined in Education Code 52052, including ethnic subgroups, socioeconomically disadvantaged students, English learners, students with disabilities, foster youth, and homeless students. The LCAP shall identify goals for each of the following state priorities:
 - a. The degree to which district teachers are appropriately assigned in accordance with Education Code 44258.9 and fully credentialed in the subject areas and for the students they are teaching; every district student has sufficient access to standards-aligned instructional materials as determined pursuant to Education Code 60119; and school facilities are maintained in good repair as specified in Education Code 17002
 - b. Implementation of the academic content and performance standards adopted by the State Board of Education (SBE), including how the programs and services will enable English learners to access the Common Core State Standards and the English language development standards for purposes of gaining academic content knowledge and English language proficiency
 - c. Parent/guardian involvement and family engagement, including efforts the district makes to seek parent/guardian input in district and school site decision making and how the district will promote parent/guardian participation in programs for unduplicated students, as defined in Education Code 42238.02 and Board policy, and students with disabilities
 - d. Student achievement, as measured by all of the following as applicable:
 - i. Statewide assessments of student achievement
 - ii. The percentage of students who have successfully completed courses that satisfy the requirements for entrance to the University of California and the California State University; have successfully completed career technical education (CTE) sequences or programs of study that align with SBE-approved career technical education standards and frameworks, including, but not limited to, those described in Education Code 52302, 52372.5, or 54692; and have successfully completed both college entrance courses and CTE sequences or programs
 - iii. The percentage of English learners who make progress toward English proficiency as measured by the SBE-certified assessment of English proficiency
 - iv. The English learner reclassification rate
 - v. The percentage of students who have passed an Advanced Placement examination with a score of 3 or higher
 - vi. The percentage of students who demonstrate college preparedness in the Early Assessment Program pursuant to Education Code 99300-99301
 - e. Student engagement, as measured by school attendance rates, chronic absenteeism rates, middle school dropout rates, high school dropout rates, and high school graduation rates, as applicable
 - f. School climate, as measured by student suspension and expulsion rates and other local measures, including surveys of students, parents/guardians, and teachers on the sense of safety and school connectedness, as applicable

- g. The extent to which students have access to and are enrolled in a broad course of study that includes all of the subject areas described in Education Code 51210 and 51220, as applicable, including the programs and services developed and provided to unduplicated students and students with disabilities, and the programs and services that are provided to benefit these students as a result of supplemental and concentration grant funding pursuant to Education Code 42238.02 and 42238.03
 - h. Student outcomes, if available, in the subject areas described in Education Code 51210 and 51220, as applicable
- 2. Any goals identified for any local priorities established by the Board.
 - 3. A description of the specific actions the district will take during each year of the LCAP to achieve the identified goals, including the enumeration of any specific actions necessary for that year to correct any deficiencies in regard to the state and local priorities specified in Items #1-2 above. Such actions shall not supersede provisions of existing collective bargaining agreements within the district.

For purposes of the descriptions required by Items #1-3 above, the Board may consider qualitative information, including, but not limited to, findings that result from any school quality review conducted pursuant to Education Code 52052 or any other reviews. (Education Code 52060)

For any local priorities addressed in the LCAP, the Board and Superintendent or designee shall identify and include in the LCAP the method for measuring the district's progress toward achieving those goals. (Education Code 52060)

To the extent practicable, data reported in the LCAP shall be reported in a manner consistent with how information is reported on the California School Dashboard. (Education Code 52060)

Increase or Improvement in Services for Unduplicated Students

The LCAP shall demonstrate how the district will increase or improve services for unduplicated students at least in proportion to the increase in funds apportioned on the basis of the number and concentration of unduplicated students. (5 CCR 15494-15496)

When the district expends supplemental and/or concentration grant funds on a districtwide or schoolwide basis during the year for which the LCAP is adopted, the district's LCAP shall: (5 CCR 15496)

- 1. Identify those services that are being funded and provided on a districtwide or schoolwide basis
- 2. Describe how such services are principally directed towards, and are effective in, meeting the district's goals for unduplicated students in the state priority areas and any local priority areas
- 3. If the enrollment of unduplicated students is less than 55 percent of district enrollment or less than 40 percent of school enrollment, describe how these services are the most effective use of the funds to meet the district's goals for its unduplicated students in the state priority areas and any local priority areas. The description shall provide the basis for this determination, including, but not limited to, any alternatives considered and any supporting research, experiences, or educational theory.

Availability of the Plan

The Superintendent or designee shall prominently post the LCAP, any updates or revisions to the LCAP, including the IDEA Addendum as applicable, and the LCFF budget overview for parents/guardians on the homepage of the district's web site. (Education Code 52064.1, 52064.3, 52065)

Policy 3250: Transportation Fees

Status: DRAFT

Original Adopted Date: Pending

Whenever the cost of providing student transportation exceeds funding provided by the state, the Governing Board may charge fees for home-to-school student transportation and other transportation services as expressly authorized by law.

The Superintendent or designee shall annually submit proposed transportation fee schedules for Board approval.

The transportation fee shall be waived for any student who is eligible for free or reduced-price meals, who is an English learner, or who is a foster youth. (Education Code 39807.5)

At the recommendation of the Superintendent or designee, the Board may also approve a waiver of a transportation fee for any group of district students.

In addition, no charge shall be made for any transportation of a student with a disability. (Education Code 39807.5)

Students receiving free transportation shall not be identified by the use of special bus passes, tickets, lines, seats, or any other means. They shall in no way be treated differently from other students, nor shall their names be published, posted, or announced in any manner or used for any purpose other than the transportation program.

The Board shall certify to the County Superintendent of Schools that the district has levied fees in accordance with law and that, in the event that excess fees have been charged, the fees have been reduced and excess fee revenue eliminated. (Education Code 39809.5)

Regulation 3250: Transportation Fees

Status: DRAFT

Original Adopted Date: Pending

When approved by the Governing Board, the district may charge transportation fees for students traveling to and from school. (Education Code 39807.5)

With Board approval, the district may also charge transportation fees for:

1. Participants in a community recreation program offered pursuant to Education Code 10900-10914.5 (Education Code 10913, 39835)
2. Students traveling between the regular full-time schools of attendance and regular full-time occupational classes provided by a regional occupational center or program (Education Code 39807.5)
3. Matriculated or enrolled adults traveling to and from school, or adults pursuing other educational purposes (Education Code 39801.5)
4. Students traveling to and from a place of employment during summer in connection with a summer employment program for youth (Education Code 39837)

The total amount received by the district from the state and parent/guardian fees shall not exceed the actual operating cost of home-to-school transportation during the fiscal year. If excess fees are collected due to errors in estimated costs, fees shall be reduced in succeeding years. (Education Code 10913, 39801.5, 39809.5, 39837)

Bus passes and tickets shall be sold, electronically, if available, and at all district schools and at the district office. No money shall be collected on school buses.

Policy 3260: Fees And Charges

Status: DRAFT

Original Adopted Date: 11/14/2017 | **Last Revised Date:** 12/10/2019

The Governing Board recognizes its responsibility to ensure that books, materials, equipment, supplies, and other resources necessary for student participation in the district's educational program are made available to students at no cost.

No student shall be required to pay a fee, deposit, or other charge for participation in an educational activity which constitutes an integral fundamental part of the district's educational program, including curricular and extracurricular activities. (Education Code 49010, 49011; 5 CCR 350)

As necessary, the Board may approve fees, deposits, and other charges which are specifically authorized by law. When approving such fees, deposits, or charges, establishing fee schedules, or determining whether waivers or exceptions should be granted, the Board shall consider relevant data, including the socioeconomic conditions of students' families and their ability to pay.

The prohibition against student fees shall not prevent the district from soliciting for donations, conducting fundraising activities, or providing prizes or other recognition for participants in such activities and events. The Superintendent or designee shall emphasize that participation of students, parents/guardians, district employees, volunteers, or educational or civic organizations in such activities and events is voluntary. The district shall not offer or award to a student any course credit or privileges related to educational activities in exchange for voluntary donations or participation in fundraising activities by or on behalf of the student. The district also shall not remove or threaten to remove from a student any course credit or privileges related to educational activities, or otherwise discriminate against the student, due to a lack of voluntary donations or participation in fundraising activities by or on behalf of the student.

The Superintendent or designee may provide information or professional development opportunities to administrators, teachers, and other personnel regarding permissible fees.

Complaints

A complaint alleging district noncompliance with the prohibition against requiring student fees, deposits, or other charges shall be filed in accordance with the district's procedures in BP/AR 1312.3 - Uniform Complaint Procedures. (Education Code 49013)

If, upon investigation, the district finds merit in the complaint, the Superintendent or designee shall recommend and the Board shall adopt an appropriate remedy to be provided to all affected students and parents/guardians in accordance with 5 CCR 4600.

Information related to the prohibition against requiring students to pay fees for participation in an educational activity shall be included in the district's annual notification of uniform complaint procedures to be provided to all students, parents/guardians, employees, and other interested parties pursuant to 5 CCR 4622. (Education Code 49013)

Collection of Debt

The Superintendent or designee shall, in accordance with law, recover any debt owed to the district as a result of unpaid permissible student fees approved by the Board. However, the district shall not bill a current or former student for accumulated debt, nor take negative action against a student or former student because of such debt, including, but not limited to, any of the following: (Education Code 49014)

1. Denying full credit for any class assignment

2. Denying full and equal participation in any classroom activity
 3. Denying access to the library or other on-campus educational facilities
 4. Denying or withholding grades or transcripts
 5. Denying or withholding a diploma
 6. Limiting or barring participation in an extracurricular activity, club, or sport
 7. Limiting or excluding the student from participation in an educational activity, field trip, or school ceremony
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Regulation 3260: Fees And Charges

Status: DRAFT

Original Adopted Date: 11/14/2017 | **Last Revised Date:** 12/10/2019

When approved by the Governing Board, the Superintendent or designee may impose a fee for the following: (5 CCR 350)

1. Insurance for athletic team members, with an exemption providing for the district to pay the cost of the insurance for any team member who is financially unable to pay (Education Code 32221)
2. Insurance for medical or hospital service for students participating in field trips and excursions (Education Code 35331)
3. Expenses of students' participation in a field trip or excursion within the state or to another state, the District of Columbia, or a foreign country, as long as no student is prohibited from making the field trip due to lack of funds (Education Code 35330)
4. Student fingerprinting program, as long as the fee does not exceed the actual costs associated with the program (Education Code 32390)
5. School camp programs in outdoor science education, conservation education, or forestry operated pursuant to Education Code 8760-8774, provided that the fee is not mandatory and no student is denied the opportunity to participate for nonpayment of the fee (Education Code 35335)
6. Reimbursement to the district for the direct cost of materials used by students to fabricate property they will take home for their own possession and use, such as wood shop, art, or sewing projects kept by students (Education Code 17551)
7. Home-to-school transportation and transportation between regular, full-time day schools and regional occupational centers, programs, or classes, as long as the fee does not exceed the statewide average nonsubsidized cost per student, and an exemption is made for any student with a disability, or any student who is eligible for free or reduced-price meals, any student who is an English learner, or any student who is a foster youth. (Education Code 39807.5)
8. Transportation for students to and from their places of employment in connection with any summer employment program for youth (Education Code 39837)
9. Deposit for school band instruments, music, uniforms, and other regalia which school band members take on excursions to foreign countries (Education Code 38120)
10. An adult education or secondary school community service class in civic, vocational, literacy, health, family and consumer sciences, technical, and general education, not to exceed the cost of maintaining the class (Education Code 51810-51815)
11. Eye safety devices worn in courses or activities involving the use of hazardous substances likely to cause injury to the eyes, when being sold to students and/or teachers or instructors to keep and at a price not to exceed the district's actual costs (Education Code 32033)
12. Actual cost of furnishing copies of any student's records, except that no charge shall be made for furnishing up to two transcripts or two verifications of a former student's records or for reproducing records of a student with a disability when the cost would effectively prevent the parent/guardian from exercising the right to receive the copies (Education Code 49065, 56504)
13. Actual cost of duplication for reproduction of the prospectus of school curriculum or for copies of public records (Education Code 49091.14; Government Code 6253)
14. Food sold at school, subject to the California Universal Meals Program, free and reduced-price meal program eligibility, and other restrictions specified in law (Education Code 38084, 49501.5)
15. In accordance with law, replacement cost or reimbursement for lost or willfully damaged district books,

supplies, or property, or for district property loaned to a student that the student fails to return (Education Code 19910-19911, 48904)

16. Tuition for district school attendance by an out-of-state or out-of-country resident (Education Code 48050, 48052, 52613; 8 USC 1184)
17. Adult education books, materials, transportation, and classes, except that no fee may be charged for classes in elementary subjects, classes for which high school credit is granted when taken by a person who does not hold a high school diploma, or classes in English and citizenship (Education Code 39801.5, 52612, 60410)
18. Preschool and child care and development services, in accordance with the fee schedule established by the Superintendent of Public Instruction, unless the family qualifies for subsidized services or the program is exempted from fees by law (Education Code 8211, 8213, 8252-8254)
19. Participation in a before-school, after-school, or intersession program that is funded as an After School Education and Safety (ASES) program, 21st Century Community Learning Center (21st CCLC), 21st Century High School After School Safety and Enrichment for Teens (ASSETs) program, or Expanded Learning Opportunity (ELO) program, provided that fees are waived or reduced for families with students who are eligible for free or reduced-price meals and, in regard to ASES and 21st CCLC programs, fees are not charged if the district knows the student is a homeless or foster youth (Education Code 8422, 8482.6, 46120)
20. Advanced Placement and International Baccalaureate Diploma examinations for college credits, as long as the examination is not a course requirement and the results have no impact on student grades or credits in the course

Collection of Debt

Before pursuing payment of any debt that has accumulated from unpaid permissible fees, the Superintendent or designee shall provide an itemized invoice for any amount owed by the parent/guardian on behalf of a student or former student. The invoice shall reference district policies related to debt collection and the rights established pursuant to Education Code 49014 and 49557.5. For each payment received, the district shall provide a receipt to the parent/guardian. (Education Code 49014)

The Superintendent or designee shall not sell debt owed by a parent/guardian of a student or former student. (Education Code 49014)

Policy 3460: Financial Reports And Accountability

Status: DRAFT

Original Adopted Date: 11/14/2017

The Governing Board is committed to ensuring public accountability and the fiscal health of the district. The Board shall adopt sound fiscal management policies and practices, oversee the district's financial condition, and continually evaluate whether the district's budget and financial operations support the district's goals for student achievement.

The Superintendent or designee shall ensure that district financial reports are prepared in accordance with law and in conformity with generally accepted accounting principles and financial reporting standards stipulated by the Governmental Accounting Standards Board and the California Department of Education (CDE). The Superintendent or designee shall establish a system of ongoing internal controls to ensure the reliability of financial reporting.

When required by law or the Board, the Superintendent or designee shall submit to the Board reports of the district's financial status, including, but not limited to, any report specified in this Board policy or accompanying administrative regulation. When submission of any such report to a local, state, and/or federal agency requires prior Board approval, the Superintendent or designee shall provide the report to the Board in sufficient time to enable the Board to carefully review the report without breaking any applicable submission deadline.

The Board shall regularly assess the district's financial position and communicate the results to the public, and shall use financial reports to determine the actions and budget amendments, if any, that are needed to ensure the district's financial stability. If district conditions predict fiscal distress or indicate that the district might not be able to meet its fiscal obligations, the Board and Superintendent or designee shall take action to resolve these conditions without delay. The Board shall work cooperatively with the County Superintendent of Schools to improve the district's fiscal health and may contract with an external individual or organization to provide the district with needed advice or fiscal management or training.

Unaudited Actual Receipts and Expenditures

On or before September 15, the Board shall approve and file with the County Superintendent a statement of the district's unaudited actual receipts and expenditures for the preceding fiscal year. The Superintendent or designee shall prepare this statement using the state's standardized account code structure (SACS) as prescribed by the Superintendent of Public Instruction (SPI). (Education Code 42100)

Gann Appropriations Limit Resolution

On or before September 15, the Board shall, at a regular or special meeting, adopt a resolution identifying, pursuant to Government Code 7900-7914, the district's estimated appropriations limit for the current fiscal year and the actual appropriations limit for the preceding fiscal year. Documentation used to identify these limits shall be made available to the public on the day of the Board meeting. (Education Code 42132; Government Code 7910)

Interim Reports/Certification of Ability to Meet Fiscal Obligations

Each fiscal year, the Superintendent or designee shall submit two interim reports to the Board. The first report shall cover the district's financial and budgetary status for the period ending October 31 and the second report shall cover the period ending January 31. These reports and supporting data shall be made available by the district for public review. (Education Code 42130)

Within 45 days after the close of the period reported, the Board shall approve the interim report and, on the basis of the interim report and any additional financial information known by the Board, shall certify in writing whether the district will be able to meet its fiscal obligations for the remainder of the fiscal year and, based on current forecasts, for the two subsequent fiscal years. The certification shall be classified as one of the following: (Education Code 42130, 42131)

1. "Positive certification" indicating that the district will meet its financial obligations for the current fiscal year and two subsequent fiscal years

2. "Qualified certification" indicating that the district may not meet its financial obligations for the current fiscal year or two subsequent fiscal years
3. "Negative certification" indicating that the district will be unable to meet its financial obligations for the remainder of the fiscal year or the subsequent fiscal year

The Superintendent or designee shall submit a copy of each interim report and certification to the County Superintendent using the state's SACS software, as prescribed by the SPI. (Education Code 42130, 42131)

If the district's certification is subsequently changed by the County Superintendent from a positive to a qualified or negative certification, or from a qualified to a negative certification, the Board may appeal the decision to the SPI within five days of receiving the notice of change. (Education Code 42131)

Whenever the district receives a qualified or negative certification from the Board or the County Superintendent, the Superintendent or designee shall cooperate in the implementation of any remedial actions taken or prescribed by the County Superintendent. (Education Code 42131)

If the second interim report is accompanied by a qualified or negative certification, the Board shall, no later than June 1, provide to the County Superintendent, the State Controller, and the SPI a financial statement as of April 30 ("third interim report") that projects the district's fund and cash balances through June 30. (Education Code 42131)

If at any time during the fiscal year, the County Superintendent concludes that the district's budget does not comply with the standards and criteria for financial stability and conducts a comprehensive review of the district's financial and budgetary conditions, the Board shall review any report of the County Superintendent's findings and recommendations at a public Board meeting. Within 15 days of receiving the report, the district shall notify the County Superintendent and the SPI of the Board's proposed actions on the recommendation. (Education Code 42637)

Audit Report

By April 1 of each year, the Board shall provide for an annual audit of the district's books and accounts. (Education Code 41020)

To conduct the audit, the Board shall select a certified public accountant or public accountant licensed by the State Board of Accountancy from among those deemed qualified by the State Controller. (Education Code 41020, 41020.5)

Except when, as determined by the Education Audits Appeal Panel, no otherwise eligible auditor is available, a public accounting firm whose lead or coordinating audit partner having primary responsibility for the audit or whose audit partner responsible for reviewing the audit has performed audit services for the district in each of the six previous fiscal years shall not be selected to perform a district audit. (Education Code 41020)

No later than December 15, the report of the audit for the preceding fiscal year shall be filed with the County Superintendent, the CDE, and the State Controller. (Education Code 41020)

Prior to December 15 whenever possible, but in no case later than January 31, the Board shall review, at an open meeting, the annual district audit for the prior year, any audit exceptions identified in that audit, the recommendations or findings of any management letter issued by the auditor, and any description of correction or plans to correct any exceptions or any issue raised in a management letter. (Education Code 41020.3)

The Board shall have an opportunity at the meeting to ask questions of the auditor and request further information about the audit findings.

Audit Committee

The Board may appoint an audit committee composed of staff knowledgeable about fiscal matters, other staff, and representatives of the community.

The committee shall serve in an advisory capacity and may:

1. Make recommendations regarding the selection of the external independent auditor in accordance with Education Code 41020 and 41020.5
 2. Review the plan for the audit process with the independent auditor to determine the adequacy of the nature, scope, and timetable of the audit
 3. Review the results of the audit and participate with the independent auditor and management in preparing final recommendations and responses
 4. Participate with the independent auditor in presenting the audit report to the Board
 5. Review Board policies and administrative regulations to recommend any revisions needed to ensure effective financial reporting
 6. Provide input on the effectiveness of the independent auditor
 7. Periodically report to the Board regarding the status of previous audit recommendations for improving the accounting and internal control systems
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Regulation 3460: Financial Reports And Accountability

Status: DRAFT

Original Adopted Date: 11/14/2017 | **Last Revised Date:** 12/10/2019

Interim Reports

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

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

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

Audit Report

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

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

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

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

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

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

Report on Expenditures of State Facilities Funds

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

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

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

Fund Balance

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

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

Negative Balance Report

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

Lease Accounting

Any lease agreement involving the district, whether as lessor or lessee, shall be classified as a short-term lease, a contract that transfers ownership, or a lease other than short-term lease and contract that transfers ownership. District financial statement disclosures and schedules related to any lease shall comply with the standards specified in GASB 87.

Non-Voter-Approved Debt Report

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

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

Other Postemployment Benefits Report

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

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

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

Workers' Compensation Claims Report

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

Policy 3515: Campus Security

Status: DRAFT

Original Adopted Date: 11/14/2017 | **Last Revised Date:** 12/10/2019

The Governing Board is committed to providing a school environment that promotes the safety of students, staff, and visitors to school grounds. The Board also recognizes the importance of protecting district property, facilities, and equipment from vandalism and theft.

The Superintendent or designee shall develop campus security procedures, which may be included in the district's comprehensive safety plan and/or site-level safety plans. Such procedures shall be regularly reviewed to reflect changed circumstances and to assess their effectiveness in achieving safe school objectives.

Additionally, the Superintendent or designee shall regularly review current guidance regarding cybersecurity and digital media awareness and incorporate recommended practices into the district's processes and procedures related to the protection of the district's network infrastructure, and the monitoring and response to suspicious and/or threatening digital media content.

Reporting Threats

Any certificated or classified employee, or other school official, whose duties bring the employee or other school official in contact on a regular basis with students in any of grades 6-12, as part of a middle or high school, who are alerted to or observe any threat or perceived threat of a homicidal act, as defined, shall immediately report the threat or perceived threat to law enforcement in accordance with Education Code 49393. (Education Code 49390, 49393)

Threat or perceived threat means any writing or action of a student that creates a reasonable suspicion that the student is preparing to commit a homicidal act related to school or a school activity. This may include possession, use, or depictions of firearms, ammunition, shootings, or targets in association with infliction of physical harm, destruction, or death in a social media post, journal, class note, or other media associated with the student. It may also include a warning by a parent, student, or other individual.

Additionally, anyone who receives or learns of a health or safety threat related to school or a school activity is encouraged to report the threat to a school or district administrator.

Surveillance Systems

In consultation with the district's school site council, safety planning committee, other relevant stakeholders, and staff, the Superintendent or designee shall identify appropriate locations for the placement of surveillance cameras. Cameras shall not be placed in areas where students, staff, or community members have a reasonable expectation of privacy. Any audio capability on the district's surveillance equipment shall be disabled so that sounds are not recorded.

Prior to the operation of the surveillance system, the Superintendent or designee shall ensure that signs are posted at conspicuous and targeted locations around school buildings and grounds. These signs shall state that the facility uses video surveillance equipment for security purposes and that the equipment may or may not be actively monitored at any time. The Superintendent or designee shall also provide prior written notice to students and parents/guardians about the district's surveillance system, including the locations where surveillance may occur and that the recordings may be used in disciplinary proceedings and/or referred to local law enforcement, as appropriate.

To the extent that any images from the district's surveillance system create a student or personnel record, the Superintendent or designee shall ensure that the images are accessed, retained, and disclosed in accordance with law, Board policy, administrative regulation, and any applicable collective bargaining agreements.

Regulation 3515: Campus Security

Status: DRAFT

Original Adopted Date: 11/14/2017 | **Last Revised Date:** 12/10/2019

The Superintendent or designee shall develop a campus security plan which contributes to a positive school climate, fosters social and emotional learning and student well-being, and includes strategies to:

1. Secure the campus perimeter and school facilities in order to prevent criminal activity

These strategies include a risk management analysis of each campus' security system, lighting system, and fencing. Procedures to ensure unobstructed views and eliminate blind spots caused by doorways and landscaping shall also be considered. In addition, parking lot design may be studied, including methods to discourage through traffic.

2. Secure buildings and interior spaces from outsiders and discourage trespassing

These strategies may include installing locks, requiring visitor registration, providing staff and student identification tags, and patrolling places used for congregating and loitering.

3. Secure the district's network infrastructure and web applications from cyberattacks

These strategies may include performing an independent security assessment of the district's network infrastructure and selected web applications.

4. Discourage vandalism and graffiti

These strategies may include plans to immediately cover graffiti and implement campus beautification.

5. Control access to keys and other school inventory

6. Detect and intervene with school crime

These strategies may include creating a school watch program, increasing adult presence and supervision, establishing an anonymous crime reporting system, monitoring suspicious and/or threatening digital media content, analyzing school crime incidents, and collaborating with local law enforcement agencies, including providing for law enforcement presence.

Additionally, all staff shall be made aware of their responsibilities regarding the immediate reporting of potential homicidal acts to law enforcement, and receive training in the assessment and reporting of such threats.

All staff shall receive training in building and grounds security procedures and emergency response.

Locks

All state-funded new construction and modernization projects shall include locks that allow doors to classrooms and any room with an occupancy of five or more persons to be locked from the inside. Student restrooms and doors that lock from the outside at all times are not required to have locks that can be locked from the inside. (Education Code 17075.50, 17583; 24 CCR 1010.2, 1010.2.8.2)

Keys

The principal or designee shall be responsible for all keys used in a school. Keys shall be issued only to authorized employees who regularly need a key in order to carry out job responsibilities.

The principal or designee shall create a key control system with a record of each key assigned and room(s) or building(s) which the key opens.

Keys shall never be loaned to students, parents/guardians, or volunteers, nor shall the master key ever be loaned.

Any person issued a key shall be responsible for its safekeeping. The duplication of school keys is prohibited. If a key is lost, the person responsible shall immediately report the loss to the principal or designee and shall pay for a replacement key.

Regulation 3516.2: Bomb Threats

Status: DRAFT

Original Adopted Date: Pending

To maintain a safe and secure environment for district students and staff, the Superintendent or designee shall ensure that the district's emergency and disaster preparedness plan and/or each school's comprehensive safety plan includes procedures for managing bomb threats. Additionally, the Superintendent or designee shall regularly review current guidance regarding cybersecurity and digital media awareness and incorporate recommended practices into the district's processes and procedures related to the protection of the district's infrastructure, and the monitoring and response to suspicious and/or threatening digital media content.

Receiving Threats

Any staff member receiving a bomb threat by telephone shall try to keep the caller on the line for as long as possible in order to gather information about the location and timing of the bomb and the person(s) responsible. To the extent possible, the staff member should also take note of the caller's gender, age, any distinctive features of voice or speech, and any background noises such as music, traffic, machinery, or voices. The staff member should not hang up, even if the caller does, and copy the number and/or letters on the telephone's display, if available.

If the bomb threat is received through regular mail or in writing, the staff member who receives it should handle the letter, note, or package as minimally as possible. If the threat is received through electronic means, such as email, text messaging, or social media, the staff member should not delete the message.

Response Procedure

The following procedure shall be followed when a bomb threat is received:

1. Any employee or other school official who receives a bomb threat shall immediately call 911 and report the threat or perceived threat to law enforcement. The employee shall also report the threat to the Superintendent or designee.

If the threat is in writing, the employee shall rewrite the threat exactly as is on another sheet of paper, including the date, time and location the document was found, any conditions surrounding the discovery or delivery of the document, and the full names of any other employees who saw the threat. The employee shall secure the document and not alter it in any way. If the document is small and/or removable, the employee shall place it in a bag or envelope.

If the threat is electronic, the employee shall leave the message open, and print, photograph, or copy the message and subject line, and note the date and time of the message.

2. Any student or employee who sees a suspicious package should not touch, tamper with, or move the item, and shall immediately notify law enforcement and the Superintendent or designee.
3. The Superintendent or designee shall immediately contact law enforcement if not yet done, assess the situation, ensure the area is secured, and initiate standard evacuation procedures as specified in the emergency plan.
4. The Superintendent or designee shall turn off any two-way radio equipment which is located in a threatened building.

Law enforcement and/or fire department staff shall conduct the bomb search. No school staff, students, parents/guardians, or others on campus shall search for or handle any explosive or incendiary device.

No one shall reenter the threatened building(s) until the Superintendent or designee declares that reentry is safe based on law enforcement and/or fire department clearance.

To the extent possible, the Superintendent or designee shall maintain communications with staff, parents/guardians, the Governing Board, other governmental agencies, and the media during the period of the incident.

Following the incident, the Superintendent or designee shall provide crisis counseling for students and/or staff as needed.

Any employee or student found to have made a bomb threat shall be subject to disciplinary procedures and/or criminal prosecution.

Staff Training

The Superintendent or designee shall provide training regarding the assessment and reporting of potential threats and procedures for managing bomb threats to district and site administrators, safety personnel, teachers, and other staff members, as appropriate.

Policy 3540: Transportation

Status: DRAFT

Original Adopted Date: 11/14/2017 | **Last Revised Date:** 12/10/2019

The Governing Board desires to provide for the safe and efficient transportation of students to and from school as necessary to ensure student access to the educational program, promote regular attendance, and reduce tardiness. In determining the extent to which the district will provide transportation services, the Board shall weigh student and community needs against the cost of providing such services.

The Superintendent or designee shall recommend to the Board economical, environmentally sustainable, and appropriate means of providing transportation services. The district's transportation services may be provided by means of a joint powers agreement, a cooperative student transportation program, or a consortium, as permitted by law.

No student shall be required to be transported for any reason without the written permission of the student's parent/guardian, except in emergency situations involving illness or injury to the student pursuant to Education Code 35350 or the evacuation of students as necessary for their safety.

Transportation Plan

The Superintendent or designee shall develop a transportation plan in consultation with classified staff, teachers, school administrators, regional local transit authorities, local air pollution control districts and air quality management districts, parents/guardians, students, and other stakeholders. (Education Code 39800.1)

The transportation plan shall be presented to and adopted by the Board at an open meeting, with the opportunity for in-person and remote public comment, and shall be updated annually by April 1. (Education Code 39800.1)

The transportation plan shall include descriptions of the following: (Education Code 39800.1)

1. The transportation services offered to students
2. How transportation services will be prioritized for low-income students, students in transitional kindergarten, kindergarten, and any of grades 1 to 6, inclusive
3. The transportation services accessible to students with disabilities and homeless children and youth, as defined pursuant to the federal McKinney-Vento Homeless Assistance Act (42 USC 11301)
4. How unduplicated students, as defined in Education Code 42238.02, will be able to access available home-to-school transportation at no cost

Transportation Contracts

The Board may purchase, rent, or lease vehicles; contract with a common carrier or municipally owned transit system; contract with responsible private parties including the parent/guardian of the student being transported; and/or contract with the County Superintendent of Schools. (Education Code 35330, 39800, 39801)

In contracting for transportation services, the district shall comply with all applicable laws related to bids and contracts. (Education Code 39802-39803)

Expenses and Fees

In lieu of providing transportation in whole or in part, the district may pay the student's parents/guardians either their actual and necessary expenses in transporting the student or the cost of the student's food and lodging at a place convenient to the school. In either case, the amount of the payment shall not exceed the cost that would be incurred by the district to provide for the transportation of the student to and from school. (Education Code 39806-39807)

The Board may charge a transportation fee to parents/guardians of transported students in accordance with Education Code 39807.5 and BP/AR 3250 - Transportation Fees.

Safety and Monitoring

The Superintendent or designee shall develop procedures to promote safety for students traveling on school buses.

The district may install a global positioning system (GPS) on school buses and/or student activity buses in order to enhance student safety and provide real-time location data to district and school administrators, and parents/guardians.

The Superintendent or designee shall ensure the qualifications of bus drivers and related staff employed by the district, provide for the maintenance and operation of district-owned school buses and other equipment, and ensure adequate facilities for equipment storage and maintenance.

Policy 5131.7: Weapons And Dangerous Instruments

Status: DRAFT

Original Adopted Date: 11/14/2017

The Governing Board recognizes that students and staff have the right to a safe and secure campus free from physical and psychological harm and desires to protect them from the dangers presented by firearms and other weapons.

Possession of Weapons

The Board prohibits any student from possessing weapons, imitation firearms, or other dangerous instruments, as defined in law and administrative regulation, in school buildings, on school grounds, when using district provided transportation, at school-related or school-sponsored activities away from school, or while going to or coming from school.

If a student is in possession of a prohibited weapon, imitation firearm, or dangerous instrument which creates a threat or perceived threat of a homicidal act, any employee or other school official who is alerted to or observes such threat shall immediately report the threat to law enforcement.

Under the power granted to the Board to protect the safety of students, staff, and others on district property and to maintain order and discipline in the schools, any school employee is authorized to confiscate any prohibited weapon, imitation firearm, or dangerous instrument from any student on school grounds.

The principal or designee shall notify law enforcement authorities when any student possesses a firearm, explosive, or other prohibited weapon or dangerous instrument without permission, sells or furnishes a firearm, or commits any act of assault with a firearm or other weapon. (Education Code 48902; Penal Code 245, 626.9, 626.10; 20 USC 7961)

Unless a student has obtained prior written permission as specified below, a student possessing or threatening others with any weapon, dangerous instrument, or imitation firearm shall be subject to suspension and/or expulsion in accordance with law, Board policy, and administrative regulations.

All staff shall be made aware of their responsibilities regarding the reporting of potential homicidal acts to law enforcement, and receive training in the assessment and reporting of such threats.

Advance Permission for Possession of a Weapon for Educational Purposes

The parent/guardian of a student who desires to possess a firearm, imitation firearm, or other prohibited weapon on school grounds for an educational purpose shall submit a written request to the principal, at least five school days in advance of the planned possession which explains the planned use of the weapon and the duration, together with a written explanation from the staff person responsible for the school-sponsored activity or class.

The principal may grant permission for such possession when it is determined that possession of a firearm, imitation firearm, or other prohibited weapon on school grounds is necessary for a school-sponsored activity or class or as part of the educational program. Factors that shall be considered include, but are not limited to, the planned use of the weapon, the duration and location of the planned use, whether an audience is expected, and any perceived adverse effects to the safety and well-being of students or staff. If the principal grants such permission, the student and staff person shall be provided with a written explanation regarding any limitations and the permissible duration of the student's possession.

When the principal or designee grants permission, all necessary precautions shall be taken to ensure the safety of all persons on school grounds and the safe keeping of the weapon, including, but not limited to, inspecting a firearm to verify that no live ammunition is present. Any permitted weapon shall be stored in a locked vehicle or in an appropriate, locked container before and after its authorized use.

Any student granted permission to possess a weapon may be suspended and/or expelled if the weapon is possessed or used inappropriately.

Possession of Pepper Spray

To prevent potential misuse that may harm students or staff, students are prohibited from carrying tear gas or tear gas weapons such as pepper spray on campus or at school activities.

Reporting of Dangerous Objects

The Board encourages students to promptly report the presence of weapons, injurious objects, or other suspicious activity to school authorities. The identity of a student who reports such activity shall remain confidential to the extent permitted by law.

The Superintendent or designee shall develop strategies designed to facilitate student reporting of the presence of injurious objects on school grounds, such as tip hotlines, electronic transmissions, or other methods that preserve the student's anonymity. Incident reports and records shall not identify the student who reported the possession. The Superintendent or designee shall also inform staff, students, and parents/guardians that students who report the presence of injurious objects on school campuses are to be protected and their identity shielded.

Regulation 5131.7: Weapons And Dangerous Instruments

Status: DRAFT

Original Adopted Date: 11/14/2017

Prohibited weapons and dangerous instruments include, but are not limited to: (Education Code 48915, 49330; Penal Code 626.10, 16100-17360, 30310)

1. Firearms: pistols, revolvers, shotguns, rifles, machineguns, "zip guns," "stun guns," tasers, cane guns, camouflaging firearms, and any other device from which is expelled through a barrel and capable of propelling a projectile by the force of an explosion or other form of combustion
2. Ammunition or reloaded ammunition
3. Knives, razor blades, and box cutters: any dirks, daggers (or concealed dirks or daggers), cane swords, ice picks, or other weapons with a fixed, sharpened blade fitted primarily for stabbing, weapons with a blade fitted primarily for stabbing, weapons with a blade longer than 3-1/2 inches, folding knives with a blade that locks into place, switchblade knives, and razors with an unguarded blade
4. Explosive and/or incendiary devices: pipe bombs, time bombs, rockets or rocket propelled projectile launchers, cap guns, bullets containing or carrying an explosive agent, containers of inflammable fluids, and other hazardous devices or concealed explosive substances
5. Any instrument that expels a metallic projectile, such as a BB or a pellet, through the force of air pressure, carbon dioxide pressure, or spring action, or any spot marker gun
6. Any other dangerous device, instrument, or weapon, including those defined in Penal Code 16000-34370, including a blackjack, slingshot, billy, nunchaku, sandclub, sandbag, metal knuckles, or any metal plate with three or more radiating points with one or more sharp edges designed for use as a weapon
7. Any imitation firearm, defined as a replica of a firearm that is so substantially similar in physical properties to an existing firearm as to lead a reasonable person to conclude that the replica is a firearm

Any employee may take any weapon or dangerous instrument from the personal possession of a student while the student is on school premises or under the authority of the district. (Education Code 49331, 49332)

In determining whether to take possession of the weapon or dangerous instrument, the employee shall use the employee's own judgment as to the dangerousness of the situation and, based upon this analysis, shall take one of the following actions:

1. Confiscate the object and deliver it to the principal immediately
2. Immediately notify the principal, who shall take appropriate action
3. Immediately notify the local law enforcement agency and the principal

When informing the principal about the possession of a weapon or dangerous instrument, the employee shall report the name(s) of persons involved, witnesses, location, and the circumstances of the possession.

The principal shall report any possession of a weapon or dangerous instrument to the student's parents/guardians by telephone or in person, and shall follow this notification with a letter.

The employee shall retain possession of the instrument until the risk of its use as a weapon has dissipated or, upon the request of the student's parent/guardian, until the parent/guardian appears and personally takes possession. (Education Code 49331, 49332)

Regulation 5141.3: Health Examinations

Status: DRAFT

Original Adopted Date: 11/14/2017

Cautionary Notice: Government Code 17581.5 relieves districts from the obligation to perform specified mandated activities, including scoliosis screening, when the Budget Act does not provide reimbursement during that fiscal year. As a result, districts should determine whether the Budget Act for the current fiscal year allows for the suspension of these requirements, and if so, suspend certain provisions of the following administrative regulation related to scoliosis screening. For more information, the district should consult CSBA's District and County Offices of Education Legal Services or district legal counsel.

The principal at each school shall notify parents/guardians of the rights of students and parents/guardians related to health examinations. (Education Code 48980; 20 USC 1232h)

A parent/guardian may annually file with the principal a written statement withholding consent to the child's physical examination. Any such student shall be exempt from any physical examination but shall be subject to exclusion from attendance when contagious or infectious disease is reasonably suspected. (Education Code 49451; 20 USC 1232h)

Vision Tests

Each student's vision shall be appraised, by the school nurse or other personnel authorized under Education Code 49452, during the kindergarten year or upon first enrollment or entry in a district elementary school and subsequently in grades 2, 5, and 8. However, a student who is tested upon first enrollment or entry in the district in grade 4 or 7 shall not be required to be appraised in the next immediate year. (Education Code 49455)

The vision appraisal shall include tests for visual acuity, including near vision. Male students shall also be tested once for color vision in grade 1 or later and the results of the appraisal shall be entered in the student's health record. (Education Code 49455)

Appraisal of a student's vision may be waived under either of the following conditions: (Education Code 49455)

1. The student's parent/guardian requests a waiver and presents a certificate from a physician/surgeon, physician assistant, or optometrist showing the results of an examination of the student's vision, including visual acuity and, in male students, color vision.
2. The student's parents/guardians file with the principal a written statement that they adhere to the faith or teachings of any well-recognized religious sect, denomination, or organization and, in accordance with its creed, tenets, or principles depend for healing upon prayer in the practice of their religion.

Visual defects or any other defects found as a result of the vision examination shall be reported to the parent/guardian with a request that remedial action be taken to correct or cure the defect. The report of a visual defect, if made in writing, shall be made on a form prescribed by the Superintendent of Public Instruction. The report shall not include a referral to any private practitioner. However, the student may be referred to a public clinic or diagnostic and treatment center operated by a public hospital or by the state, county, or city department of public health. (Education Code 49456)

In addition to the vision appraisals described above, the school nurse and/or classroom teacher shall continually and regularly observe students' eyes, appearance, behavior, visual performance, and perception that may indicate vision difficulties. (Education Code 49455)

Eye Examinations for the Purpose of Eyeglasses

In addition to the vision appraisals described above, the district may enter into a memorandum of understanding with a nonprofit eye examination provider, including a mobile provider, to provide noninvasive eye examinations at a district school exclusively for the purpose of providing eyeglasses. (Education Code 49455.5)

Prior to any eye examination, the school shall notify parents/guardians of the upcoming eye examination and include

a form that allows them to opt their child out of the examination. Parents/guardians who have submitted a general opt-out written statement in accordance with Education Code 49451 are deemed to have opted out. (Education Code 49455.5)

Parents/guardians whose child receives an eye examination shall be provided a report by the provider in accordance with Education Code 49456. (Education Code 49455.5)

Hearing Tests

The Superintendent or designee shall provide for the administration of hearing tests to district students by personnel authorized to conduct such testing pursuant to Education Code 49452 and 49454 and in accordance with the procedures specified in 17 CCR 2951.

Each student shall be given a hearing screening test at the following times: (17 CCR 2951)

1. Kindergarten or grade 1
2. Grade 2
3. Grade 5
4. Grade 8
5. Grade 10 or 11
6. Upon first entry into the California public school system

Each student enrolled in a special education program, other than those enrolled because of a hearing problem, shall be given a hearing test when enrolled in the program and every third year thereafter. Hearing tests may be given more frequently as needed, based on the individualized education program team's evaluation of the student. (17 CCR 2951)

A follow-up hearing threshold test shall be administered to any student who fails to respond to any of the required frequencies in the screening test or is otherwise determined to need further evaluation. (17 CCR 2951)

The Superintendent or designee shall provide written notification of test results to the parents/guardians of any student who fails the hearing tests. When the test results fall within the levels specified in 17 CCR 2951 or there is evidence of pathology, such as an infection of the outer ear, chronic drainage, or a chronic earache, the notification shall include a recommendation that a further medical and audiological evaluation be obtained. (17 CCR 2951)

The dates and results of all screening tests and copies of threshold tests shall be included in the student's health records. (17 CCR 2951)

The principal or designee shall prepare an annual report of the school hearing testing program, using forms provided by the Department of Health Services, with copies to the Superintendent and the County Superintendent of Schools. (17 CCR 2951)

Scoliosis Screening

Each female student in grade 7 and each male student in grade 8 shall be screened for scoliosis. (Education Code 49452.5)

The parent/guardian of any student suspected of having scoliosis shall receive a notice which includes an explanation of scoliosis and describes the significance of treatment at an early age. This notice shall also describe the public services available for treatment and include a referral to appropriate community resources. (Education Code 49452.5)

Type 1 Diabetes Information

The Superintendent or designee shall provide parents/guardians of children enrolled in elementary school for the first time, or with the annual notifications pursuant to Education Code 48980, an information sheet developed by the California Department of Education (CDE) regarding type 1 diabetes as specified in Education Code 49452.6.

Type 2 Diabetes Information

Because type 2 diabetes in children is a preventable and treatable disease, parents/guardians are encouraged to have their child screened by an authorized health care practitioner for risk factors of the disease, including excess weight, and to request tests of their child's blood glucose to determine if the child has type 2 diabetes or pre-diabetes.

The Superintendent or designee shall provide parents/guardians of incoming students in grade 7, or with the annual notifications pursuant to Education Code 48980, an information sheet developed by CDE regarding type 2 diabetes, which includes: (Education Code 49452.7)

1. A description of the disease and its risk factors and warning signs
2. A recommendation that students displaying or possibly suffering from risk factors or warning signs associated with type 2 diabetes be screened for the disease
3. A description of the different types of diabetes screening tests available
4. A description of treatments and prevention methods

The Superintendent or designee may provide information to parents/guardians regarding public or private sources from which they may receive diabetes screening and education services for free or at reduced costs.

Policy 5142: Safety

Status: DRAFT

Original Adopted Date: 11/14/2017 | **Last Revised Date:** 12/10/2019

The Governing Board recognizes the importance of providing a safe school environment that is conducive to learning and promotes student safety and well-being. Appropriate measures shall be implemented to minimize the risk of harm to students, including, but not limited to, protocols for maintaining safe conditions on school grounds, promoting safe use of school facilities and equipment, and guiding student participation in educational programs and school-sponsored activities.

Additionally, the Superintendent or designee shall regularly review current guidance regarding cybersecurity and digital media awareness and incorporate recommended practices into the district's processes and procedures related to the protection of the district's network infrastructure, and the monitoring and response to suspicious and/or threatening digital media content.

School staff shall be responsible for the proper supervision of students at all times when students are subject to district rules, including, but not limited to, during school hours, school-sponsored activities, before and after-school programs, morning drop-off and afternoon pick-up, and while students are using district provided transportation.

The Superintendent or designee shall ensure that students receive appropriate instruction on topics related to safety and emergency procedures, as well as injury and disease prevention.

Crossing Guards/Student Safety Patrol

To assist students in safely crossing streets adjacent to or near school sites, the Board may employ crossing guards and/or establish a student safety patrol at any district school. The Superintendent or designee shall periodically examine traffic patterns within school attendance areas in order to identify locations where crossing assistance may be needed.

Student Identification Cards and Safety Information

Student identification cards of students in grades 7-12 shall have printed on them safety information, including the following: (Education Code 215.5)

1. The National Suicide Prevention Lifeline telephone number and, at the district's discretion, the Crisis Text Line and/or a local suicide prevention hotline telephone number
 2. The National Domestic Violence Hotline
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Regulation 5142: Safety

Status: DRAFT

Original Adopted Date: 11/14/2017 | **Last Revised Date:** 12/10/2019

At each school, the principal or designee shall establish emergency procedures, rules for student conduct, and rules for the safe and appropriate use of school facilities, equipment, and materials, consistent with law, Board policy, and administrative regulation. The rules shall be communicated to students, distributed to parents/guardians, and readily available at the school at all times.

Release of Students

Students shall be released during the school day only to the custody of an adult who is one of the following:

1. The student's custodial parent/guardian
2. An adult authorized on the student's emergency card as an individual to whom the student may be released when the custodial parent/guardian cannot be reached, provided the principal or designee verifies the adult's identity
3. An authorized law enforcement officer acting in accordance with law
4. An adult taking the student to emergency medical care at the request of the principal or designee

Supervision of Students

Teachers shall be present at their respective rooms and shall open them to admit students not less than 30 minutes before the time that school starts. (5 CCR 5570)

Every teacher shall hold students to a strict account for their conduct on the way to and from school, on the playgrounds, and during recess. (Education Code 44807)

The principal or designee shall require all individuals supervising students to remain alert for unauthorized persons and dangerous conditions, and promptly report any unusual incidents to the principal or designee and file a written report as appropriate.

Any certificated or classified employee, or other school official, whose duties bring the employee or other school official in contact on a regular basis with students in any of grades 6-12, as part of a middle or high school, who are alerted to or observe any threat or perceived threat of a homicidal act, as defined, shall immediately report the threat or perceived threat to law enforcement in accordance with Education Code 49393. (Education Code 49390, 49393)

Threat or perceived threat means any writing or action of a student that creates a reasonable suspicion that the student is preparing to commit a homicidal act related to school or a school activity. This may include possession, use, or depictions of firearms, ammunition, shootings, or targets in association with infliction of physical harm, destruction, or death in a social media post, journal, class note, or other media associated with the student. It may also include a warning by a parent, student, or other individual.

Additionally, anyone who receives or learns of a health or safety threat related to school or a school activity is encouraged to report the threat to a school or district administrator.

In arranging for appropriate supervision on playgrounds, the principal or designee shall:

1. Clearly identify supervision zones and require all playground supervisors to remain at a location from which they can observe their entire zone of supervision and be observed by students in the supervision zone
2. Consider the size of the playground area, the number of areas that are obstructed from open view, and the age of the students to determine the ratio of playground supervisors to students

At any school where playground supervision is not otherwise provided, the principal or designee shall provide for

certificated employees to supervise the conduct and safety, and direct the play, of students who are on school grounds before and after school and during recess and other intermissions. (5 CCR 5552)

The Superintendent or designee shall ensure that teachers, teacher aides, playground supervisors, yard aides, and volunteers who supervise students receive training in safety practices and in supervisory techniques that will help prevent problems and resolve conflicts among students. Additionally, all staff and other school officials shall be made aware of their responsibilities regarding the reporting of potential homicidal acts to law enforcement, and receive training in the assessment and reporting of such threats. The training shall be documented and kept on file.

Student Safety Patrols

A school safety patrol shall be composed of students of the school selected by the principal or designee and shall be allowed to serve only with written consent of the students and their parents/guardians. Patrol members shall be at least 10 years old and in the fifth grade. (Education Code 49302; 5 CCR 571)

School safety patrols shall be used only at those locations where the nature of traffic will permit their safe operation. The locations where school safety patrols are used should be determined jointly with the local law enforcement agency. (5 CCR 572)

Patrol members shall be under the supervision and control of the principal or designee and shall receive training in proper procedures, including, but not limited to, the operations specified in 5 CCR 573-574. Whenever on duty, patrol members shall wear the standard uniform required by 5 CCR 576.

Playground Safety

Any new playground or any replacement of equipment or modification of components inside an existing playground shall conform to standards set forth by the American Society for Testing and Materials and the guidelines set forth by the U.S. Consumer Product Safety Commission. The Superintendent or designee shall have a playground safety inspector certified by the National Playground Safety Institute conduct an initial inspection to aid compliance with applicable safety standards. (Health and Safety Code 115725)

Activities with Safety Risks

Due to concerns about the risk to student safety, the principal or designee shall not permit the following activities on campus or during school-sponsored events unless the activity is properly supervised, students wear protective gear as appropriate, and each participant has insurance coverage:

1. Trampolining
2. Scuba diving
3. Skateboarding or use of scooters
4. In-line or roller skating or use of skate shoes
5. Sailing, boating, or water skiing
6. Cross-country or downhill skiing
7. Motorcycling
8. Target shooting
9. Horseback riding
10. Rodeo
11. Archery

12. Mountain bicycling
13. Rock climbing
14. Rocketeering
15. Surfing
16. Body Contact Sports
17. Other activities determined by the principal to have a high risk to student safety

As needed, the Superintendent or designee may periodically provide training or instruction to students on the safe use of electric, motorized or nonmotorized bicycles, scooters, skateboards, and roller skates. Any student who rides any such bicycle, scooter, skateboard, or roller skates at school shall wear a properly fitted and fastened bicycle helmet.

Events In or Around a Swimming Pool

When any on-campus event that is not part of an interscholastic athletic program is sponsored or hosted by the district and is to be held in or around a swimming pool, at least one adult with a valid certification of cardiopulmonary resuscitation training shall be present throughout the duration of the event. (Education Code 35179.6)

Laboratory Safety

The principal of each school offering laboratory work shall develop procedures for laboratory safety and designate a trained certificated employee to regularly review, update, and implement these procedures.

Students in a laboratory shall be under the supervision of a certificated employee. Students shall be taught laboratory safety, and safety guidelines and procedures shall be posted in science classrooms. Students shall receive continual reminders about general and specific hazards.

Hazardous materials shall be properly used, stored, and disposed of in accordance with law and the district's chemical hygiene plan.

Bloodborne pathogens shall be handled in accordance with the district's exposure control plan.

The district's emergency plan, emergency contact numbers, and first aid supplies shall be readily accessible.

Parents/guardians shall be made aware of the kinds of laboratory activities that will be conducted during the school year.

Hearing Protection

The Superintendent or designee shall monitor students' exposure to excessive noise in classrooms and provide protection as necessary. The Superintendent or designee may also provide hearing conservation education to teach students ways to protect their hearing.

Eye Safety Devices

The Superintendent or designee shall provide schools with eye safety devices for use whenever students, teachers, or visitors are engaged in or observing an activity or using hazardous substances likely to cause injury to the eyes. Eye safety devices may be sold to students for an amount not to exceed the actual cost to the district. (Education Code 32030, 32031, 32033)

Protection Against Insect Bites

To help protect students against insect bites or stings that may spread disease or cause allergic reactions, students shall be allowed to apply insect repellent provided by their parents/guardians, when engaging in outdoor activities. Any application of insect repellent shall occur under the supervision of school personnel, and in accordance with the manufacturer's directions.

Regulation 5142.2: Safe Routes To School Program

Status: DRAFT

Original Adopted Date: 11/14/2017

District strategies to improve student safety along routes to school and to promote walking, bicycling, and other forms of active transport to school by students may include:

1. Education activities that promote safety and awareness, such as:
 - a. Instructing students about pedestrian and personal safety related to the use of electric or motorized and nonmotorized bicycles or scooters, including by local law enforcement, organizations specified in Education Code 38134, and public agencies that provide safety instructions on such bicycles and scooters.
 - b. Instructing students about the health, academic, and environmental benefits of walking, bicycling, and other forms of active transport to school
 - c. Offering driver safety information to high school students, parents/guardians, and the community to promote safety around school campuses and routes
2. Encouragement strategies designed to generate interest in active transport to school, such as:
 - a. Organizing or facilitating "walking school buses" and/or "bicycle trains" whereby students walk or bike to school in groups escorted by parents/guardians or other volunteers as needed
 - b. Organizing special events and activities, such as Walk or Bike to School Day, International Walk to School Month, or year-round competitions
 - c. Publicizing the district's efforts in order to build support of parents/guardians and the community, including providing information about the district's safe routes to school program in parent/guardian communications and in any notifications about transportation options
3. Enforcement strategies to deter unsafe behaviors of drivers, pedestrians, and bicyclists, such as:
 - a. Initiating or expanding crossing guard, student safety patrol, and/or parent/guardian safety patrol programs
 - b. Partnering with local law enforcement to help ensure that traffic laws are obeyed in the vicinity of schools and to implement appropriate measures such as placement of speed feedback monitors, ticketing, and/or driver safety campaigns
 - c. Monitoring to ensure that students who bicycle to school or who use skateboards, skates, or nonmotorized scooters wear helmets in accordance with Vehicle Code 21212
4. Engineering strategies that address the design, implementation, operation, and maintenance of traffic control devices or physical measures, such as:
 - a. Working with local government agencies, parents/guardians, school staff, and others as appropriate to gather data about environmental conditions and hazards along routes to school
 - b. Working with local government agencies to make operational and physical improvements that reduce or eliminate hazards, such as reducing motor vehicle traffic speeds in the area and establishing safer and fully accessible crosswalks, walkways, trails, and bikeways
 - c. Assessing the adequacy, accessibility, and safety of bicycle parking at schools and making modifications as needed, such as increasing the number of or relocating bicycle racks and/or equipment storage areas
 - d. Considering safe routes to school when making decisions about siting and designing of new schools
5. Evaluation to assess progress toward program goals, including:

- a. Gathering and interpreting data based on indicators established by the Superintendent and the Governing Board
 - b. Presenting data to the Board, program partners, and the public
 - c. Recommending program modifications as needed
- 6. Emerging technologies that aid in the prevention and mitigation of accidents
 - 7. Emergency response in managing injuries after an accident occurs, including, but not limited to, training staff, crossing guards, student and/or parent/guardian safety patrols, and other volunteers who assist with drop-off and pick-up in emergency procedures
 - 8. Equity, such that resources are distributed in a manner that provides safe access and participation in an equitable manner across the community
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Policy 5148.2: Before/After School Programs

Status: DRAFT

Original Adopted Date: 01/11/2022

The Governing Board desires to provide learning opportunities for students beyond the regular school day that support the regular education program in a supervised environment. In order to increase academic achievement of participating students, the content of such programs shall be coordinated with the district's vision and goals for student learning, local control and accountability plan, curriculum, and academic standards.

Each program offered by the district shall be planned through a collaborative process as required by law. (Education Code 8422, 8482.5, 8484.75, 46120)

To the extent feasible, the district shall give priority to establishing expanded learning opportunities beyond the regular school day in low-performing schools and/or programs that serve low-income and other at-risk students.

Any expanded learning opportunities, including but not limited to After School Education and Safety Program (ASES), 21st Century Community Learning Center Program (21st CCLC), 21st Century High School After School Safety and Enrichment for Teens Program (ASSETs), Expanded Learning Opportunities Program (ELO) or any other program to be established pursuant to Education Code 8421, 8482.3, 8484.75, or 46120, shall be approved by the Board.

The Superintendent or designee shall ensure that all staff who directly supervise students in the district's expanded learning opportunity programs possess appropriate knowledge and experience. As needed, staff and volunteers shall receive ongoing training related to their job responsibilities.

Each before-school, after-school, summer, vacation or intersessional expanded learning opportunity program shall include academic and enrichment elements in accordance with law and administrative regulation. In addition, each program may include support services that reinforce the educational component and promote student health and well-being.

No fee shall be charged for participation in the program.

However, for the ASSETs program, a family fee shall be waived or reduced for families with students who are eligible for free or reduced-price meals. (Education Code 8422)

For ASES, 21st CCLC, and/or ELO s programs, no fee shall be charged for a student who is eligible for free or reduced-price meals, or a student who the district knows is a homeless youth or in foster care. In addition, family fees shall be calculated on a sliding scale that considers family income and ability to pay. (Education Code 8482.6, 46120)

Eligible students who are 11 or 12 years of age shall be placed in a before-school or after-school program, if and when available, rather than subsidized child-care and development services. During the time that the before-school or after-school program does not operate, such students may be provided the option of enrolling in child-care and development services in accordance with the enrollment priorities established in AR 5148 - Child Care and Development. (Welfare and Institutions Code 10273)

The Board and the Superintendent or designee shall monitor student participation rates and shall identify multiple measures that shall be used to evaluate program effectiveness. Such measures may include, but are not limited to, student outcome data; program self-assessments; feedback from staff, participating students, and parents/guardians; and observations of program activities.

Every three years, the Superintendent or designee shall review the after-school program plan, including, but not limited to, program goals, program content, and outcome measures. Documentation of the program plan shall be maintained for a minimum of five years.

Regulation 5148.2: Before/After School Programs

Status: DRAFT

Original Adopted Date: 01/11/2022

Definitions

Expanded learning opportunities means before school, after school, summer, vacation, and/or intersessional learning programs that focus on developing the academic, social, emotional, and physical needs and interests of students through hands-on, engaging learning experiences. Expanded learning opportunities does not mean an extension of instructional time, but rather, opportunities to engage students in enrichment, play, nutrition, and other developmentally appropriate activities. (Education Code 8482.1, 46120)

Offer access, with regard to an Expanded Learning Opportunities (ELO) program, means to recruit, advertise, publicize, or solicit through culturally and linguistically effective and appropriate communication channels. (Education Code 46120)

Provide access, with regard to an ELO program, means to register or enroll a student in an ELO program. (Education Code 46120)

Unduplicated student means a student enrolled in a district who is either classified as an English learner, eligible for a free or reduced-price meal, or is a foster youth. (Education Code 42238.02, 46120)

Grades TK-9

The district's After School Education and Safety (ASES) program or 21st Century Community Learning Center (21st CCLC) program shall serve students in any of grades TK-9 as the district may determine based on local needs. (Education Code 8482.3, 8484.7, 8484.75, 8484.8)

The district's 21st CCLC program shall primarily serve students in Title I schoolwide programs. (Education Code 8484.8; 20 USC 7173)

The district's ELO program shall serve students in grades TK-6. (Education Code 46120)

The district's programs shall be planned through a collaborative process that includes parents/guardians, students, and representatives of participating schools, governmental agencies, including city and county parks and recreation departments, local law enforcement, community organizations, and the private sector. As appropriate, the Superintendent or designee may include other stakeholders in such collaborative process. (Education Code 8482.5, 8484.75, 46120)

For the 2022-23 school year, the district shall offer access to ELO programs to all unduplicated students in grades TK-6 and provide access to such programs to at least 50 percent of enrolled unduplicated students. (Education Code 46120)

The district shall offer access to the ELO program to all classroom-based unduplicated students in grades TK-6. The district shall provide access to any unduplicated student whose parent/guardian requests placement in an ELO program.

The Superintendent or designee shall ensure that the plan to provide access to full-day learning programs the year before kindergarten addresses the needs of children and their families as specified in BP 6170.1 - Transitional Kindergarten. (Education Code 8322)

The district's ASES, 21st CCLC, and ELO program(s) shall be operated in accordance with the following:

1. Program Elements

- a. The program shall include an educational and literacy element in which tutoring or homework assistance

is provided in language arts, mathematics, history and social science, computer training, and/or science. (Education Code 8482.3, 8484.75, 46120)

- b. The program shall include an educational enrichment element which may include, but is not limited to, fine arts, career technical education, recreation, technology, physical fitness, and prevention activities. (Education Code 8482.3, 8484.75, 46120)

2. Nutrition

- a. Snacks or meals made available in the program shall conform to nutrition standards specified in Education Code 49430-49434 or 42 USC 1766 as applicable. (Education Code 8482.3, 8484.75, 46120; 42 USC 1766-1766a; 7 CFR 226.17)
- b. The district's before-school program shall offer a breakfast meal as described in Education Code 49553 for all program participants. (Education Code 8483.1, 8484.75)

3. Location of Program

- a. The program may be offered at one or multiple school sites and/or at an easily available and accessible off-campus facility. (Education Code 8482.3, 8484.75)
- b. When there is a significant barrier to student participation in either the before-school or after-school component of a program at the school of attendance, the Superintendent or designee may, with the approval of the Superintendent of Public Instruction, provide services at another school site. Such transfer of services shall occur only if the school to which the program will be transferred agrees to receive students from the transferring school and has an existing grant of the same type as the transferring school, or does not have a 10-percent lower percentage of students eligible for free or reduced-price meals than the transferring school. A significant barrier includes any of the following: (Education Code 8482.8, 8484.75)
 - i. Fewer than 20 students participating in the program component
 - ii. Extreme transportation constraints, including, but not limited to, desegregation busing, busing for magnet or open enrollment schools, or student dependence on public transportation
 - iii. A reduction in the program grant of an existing school due to its merging into a new school opened by the district or the splitting of its students with a new school

In such cases, the district shall arrange for safe, supervised transportation between school sites; ensure communication among staff in the regular school program, staff in the before-school or after-school program, and parents/guardians; and ensure alignment of the educational and literacy elements with the regular school program of participating students. (Education Code 8482.8, 8484.75)

4. Staffing

- a. All staff members who directly supervise students shall, at a minimum, meet the qualifications for an instructional aide. (Education Code 8483.4, 8484.75, 45330, 45344, 45344.5)
- b. All program staff and volunteers shall be subject to the health screening and fingerprint clearance requirements in law and Board policy. (Education Code 8483.4, 8484.75)
- c. The student-to-staff ratio shall be no more than 20 to 1, except that programs serving transitional kindergarten or kindergarten students shall maintain a student-to-staff member ratio of no more than 10 to 1 (Education Code 8483.4, 8484.75, 46120)

5. Hours of Operation

- a. A before-school program shall not operate for less than one and one-half hours per regular school day. (Education Code 8483.1, 8484.75)

- b. An after-school program shall begin immediately upon the conclusion of the regular school day and shall operate a minimum of 15 hours per week and at least until 6 p.m. on every regular school day. (Education Code 8483, 8484.75)
- c. An ELO program shall provide in-person before or after school expanded learning opportunities that, when added to daily instructional minutes, shall not be less than nine hours of combined instructional time and expanded learning opportunities per instructional day. (Education Code 46120)

6. Admissions

- a. Every student attending a school operating a program is eligible to participate in the program, subject to program capacity. (Education Code 8482.6, 8484.75)
- b. If the number of students wishing to participate in the program exceeds program capacity, students shall be selected for enrollment based on the following guidelines:
 - i. First priority for enrollment shall be given to students who are identified as homeless youth, as defined by the McKinney-Vento Homeless Assistance Act (42 USC 11434a), at the time they apply for enrollment or at any time during the school year, to students who are identified by the program as being in foster care, and to students who are eligible for free or reduced-price meals. (Education Code 8483, 8483.1, 8484.75)

The district is not required to disenroll a current student in order to secure the enrollment of a student who has priority for enrollment. (Education Code 8483, 8483.1)

The district shall inform the parent/guardian of a homeless or foster youth, or student eligible for free or reduced price meals, of the right of the child to receive priority enrollment and how to request priority enrollment. (Education Code 8483, 8484.75)

- ii. Second priority for enrollment of middle or junior high school students shall be given to students who attend daily. (Education Code 8483, 8483.1, 8484.75)
- iii. Third priority for enrollment shall be given to students identified as in need of academic remediation or support in accordance with Board policy or administrative regulation.
- iv. Any remaining capacity shall be filled by students selected at random.
- v. A waiting list shall be established to accommodate additional students if space becomes available.

7. Attendance/Early Release

- a. Each student admitted into a district program shall be expected to attend the full number of hours that the program is in operation every day that the student participates. An ELO program offered pursuant to Education Code 46120 does not have an attendance requirement, but the district may track student attendance for safety and continuous quality improvement purposes.
- b. When necessary, a student's parent/guardian may request, in writing, that the Superintendent or designee approve the reasonable late daily arrival for the before-school program or the reasonable early daily release from the after-school program. The Superintendent or designee shall not approve such a request if the student would be attending less than one-half of the daily program hours.

8. Summer/Intersession/Vacation Programs

- a. ELO programs shall offer no less than nine hours of in-person expanded learning opportunities per day for at least 30 non-school days, during intersessional periods.
- b. A before-school program operating during summer, intersession, and/or vacation days shall be offered for a minimum of two hours per day. An after-school program offered during summer, intersession, and/or vacation days may be operated for either three hours or six hours per day in accordance with Education Code 8483.76. When both before-school and after-school programs are offered for the same students on such days, they shall be operated for a minimum of four and one-half hours per day.

(Education Code 8483, 8483.1, 8483.2, 8483.76)

- c. A program offered during summer, intersession, and/or vacation periods may open eligibility to every student attending a school in the district, with priority for enrollment given to students enrolled in the school that received the grant. (Education Code 8483.76)
- d. To address the needs of students and school closures, the program may be conducted at an off-site location or an alternate school site. The program shall notify the California Department of Education (CDE) of the change of location and shall include a plan to provide safe transportation pursuant to Education Code 8484.6. (Education Code 8483.76)
- e. Any program operating for six hours per day shall provide at least one nutritionally adequate free or reduced-price meal to each eligible student during each program day. (Education Code 8483.76)
- f. For any program operating six hours per day, district procedures pertaining to student attendance and early release as specified in item #7 above shall apply. (Education Code 8483.76)

Grades 9-12

The district's 21st Century High School After School Safety and Enrichment for Teens (ASSETs) program shall serve students in any of grades 9-12 as the district may determine based on local needs. (Education Code 8421)

The district's ASSETs program shall be planned through a collaborative process that includes parents/guardians, students, and representatives of participating schools, governmental agencies including city and county parks and recreation departments, local law enforcement, community organizations, and, if appropriate, the private sector. (Education Code 8422)

The program shall be operated in accordance with the following guidelines:

1. Program Elements

- a. The program shall include an academic assistance element that is coordinated with the regular academic program and includes, but is not limited to, at least one of the following: (Education Code 8421)
 - i. Tutoring
 - ii. Career exploration, including activities that help students develop the knowledge and skills that are relevant to their career interests and reinforce academic content
 - iii. Homework assistance
 - iv. College preparation, including information about the Cal Grant program pursuant to Education Code 69430-69460
- b. The program shall include an enrichment element that may include, but is not limited to: (Education Code 8421)
 - i. Community service
 - ii. Career and technical education
 - iii. Job readiness
 - iv. Opportunities for mentoring and tutoring younger students
 - v. Service learning
 - vi. Arts
 - vii. Computer and technology training

viii. Physical fitness

ix. Recreation activities

- c. The program shall include a nutritional snack and/or meal and a physical activity element. (Education Code 8423)
- d. The program shall provide for access to, and availability of, computers and technology. (Education Code 8423)
- e. The Superintendent or designee shall assess students' preferences for program activities. (Education Code 8423)

2. Location of Program

- a. The district's program may operate on one or multiple school sites or at another location approved by CDE. (Education Code 8421)
- b. If applying for a location off school grounds, the Superintendent or designee shall ensure that safe transportation is available for students, if necessary, and the program is at least as available and accessible as similar programs conducted on school sites. (Education Code 8421)

3. Hours of Operation

- a. The district's program shall operate for a minimum of 15 hours per week. (Education Code 8421)
- b. The district's program may be operated either after school only or for any combination of after school, before school, weekends, summer, intersession, and vacations. (Education Code 8422)

Volunteers

The Superintendent or designee may establish a registry of volunteer after-school physical recreation instructors and other before-school and after-school program volunteers. (Education Code 35021.3)

To be included in the registry, a volunteer shall submit to a criminal background check pursuant to Education Code 45125. The volunteer shall also submit current contact information to the district and shall update that information whenever the information changes. (Education Code 35021.3)

The Superintendent or designee may use a volunteer registered with the district or may select another person to provide physical recreation to students after school hours or to provide other services. (Education Code 35021.3)

Reports

The Superintendent or designee shall annually submit to CDE outcome-based data, including, but not limited to: (Education Code 8427, 8482.3, 8484)

- 1. For participating students, school day attendance on an annual basis and program attendance on a semi-annual basis
- 2. Evidence of a program quality improvement process that is data driven and based on CDE program quality standards

Regulation 6164.4: Identification And Evaluation Of Individuals For Special Education

Status: DRAFT

Original Adopted Date: 11/14/2017 | **Last Revised Date:** 10/12/2021

The Superintendent or designee shall ensure that the district's child find process includes the collection of data and, at reasonable intervals, the screening of such data to determine if students are making adequate progress, as appropriate.

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

However, the district shall ensure that evaluations of children suspected of having a disability are not delayed or denied because of the implementation of response to intervention strategies.

A parent/guardian or the district may initiate a request for an initial evaluation to determine if the student is a student with a disability. (34 CFR 300.301)

When a verbal referral is made, staff shall offer assistance to the individual to make the request in writing and shall assist the individual if the individual requests such assistance. (5 CCR 3021)

All referrals from school staff for an initial evaluation shall include a brief reason for the referral and description of the regular program resources that were considered and/or modified for use with the student and, when appropriate, the results of intervention. This documentation shall not delay the timelines for completing the assessment plan or assessment. (5 CCR 3021)

Initial Evaluation for Special Education Services

Before the initial provision of special education and related services to a student with a disability, the district shall conduct an individual initial evaluation of the student's educational needs related to all areas of suspected disability. (Education Code 56320; 34 CFR 300.301)

Upon receipt of a referral of any student for special education and related services, a proposed evaluation plan shall be developed within 15 calendar days, not counting days between the student's regular school sessions or terms or calendar days of school vacation in excess of five school days, unless the parent/guardian agrees, in writing, to an extension. If the referral is made within 10 days or less prior to the end of the student's regular school year or term, the proposed evaluation plan shall be developed within 10 days after the beginning of the next regular school year or term. (Education Code 56043, 56321)

The proposed evaluation plan shall meet all of the following requirements: (Education Code 56321)

1. Be in a language easily understood by the general public
2. Be provided in the native language of the parent/guardian or other mode of communication used by the parent/guardian unless it is clearly not feasible
3. Explain the types of evaluation to be conducted
4. State that no individualized education program (IEP) will result from the evaluation without parent/guardian consent

A copy of the notice of a parent/guardian's rights and procedural safeguards shall be attached to the evaluation plan. (Education Code 56321)

The proposed written evaluation plan shall include a description of recent assessments conducted, including available independent assessments and assessment information requested by the parent/guardian to be considered, as well as information indicating the student's primary language and the student's primary language proficiency as determined by Education Code section 52164.1. (5 CCR 3022)

Before conducting an initial evaluation, the district shall provide the parent/guardian with prior written notice in accordance with 34 CFR 300.503. In addition, as part of the evaluation plan, the parent/guardian shall receive written notice that includes all of the following information: (Education Code 56329; 34 CFR 300.304, 300.502, 300.504)

1. Upon completion of the administration of tests and other evaluation materials, an IEP team meeting that includes the parent/guardian or the parent/guardian's representative shall be scheduled pursuant to Education Code 56341. At this meeting, the team shall determine whether or not the student is a student with disabilities, as defined in Education Code 56026, and shall discuss the evaluation, the educational recommendations, and the reasons for the recommendations.
2. When making a determination of eligibility for special education, the district shall not determine that the student is disabled if the primary factor for such determination is lack of appropriate instruction in reading, including the essential components of reading instruction as defined in 20 USC 6368, lack of appropriate instruction in mathematics, or limited English proficiency, if the student does not otherwise meet the eligibility criteria under 34 CFR 300.8.
3. A copy of the evaluation report and the documentation of determination of eligibility shall be given to the parent/guardian.
4. If the parent/guardian disagrees with an evaluation obtained by the district, the parent/guardian has the right to obtain, at public expense, an independent educational evaluation (IEE) of the student from qualified specialists, in accordance with 34 CFR 300.502. The parent/guardian is entitled to only one such evaluation at public expense each time the district conducts an assessment with which the parent/guardian disagrees.

If the district observed the student in conducting its evaluation, or if its evaluation procedures make it permissible to have in-class observation of the student, an equivalent opportunity shall apply to the IEE. This equivalent opportunity shall apply to the student's current placement and setting as well as observation of the district's proposed placement and setting, if any, regardless of whether the IEE is initiated before or after the filing of a due process hearing proceeding.

5. The district may initiate a due process hearing pursuant to Education Code 56500-56508 to show that its evaluation is appropriate. If the final decision resulting from the due process hearing is that the evaluation is appropriate, the parent/guardian maintains the right for an IEE, but not at public expense.

If the parent/guardian obtains an IEE at private expense, the results of the IEE shall be considered by the district with respect to the provision of a free appropriate public education (FAPE) to the student, and may be presented as evidence at a due process hearing regarding the student. If the district observed the student in conducting its evaluation, or if its evaluation procedures make it permissible to have in-class observation of a student, an equivalent opportunity shall apply to an IEE of the student in the student's current educational placement and setting and in any educational placement and setting proposed by the district, regardless of whether the IEE is initiated before or after the filing of a due process hearing.

6. If the parent/guardian proposes a publicly financed placement of the student in a nonpublic school, the district shall have an opportunity to observe the proposed placement and, if the student has already been unilaterally placed in the nonpublic school by the student's parent/guardian, the student in that proposed placement. Any such observation shall only be of the student who is the subject of the observation and shall not include the observation or evaluation of any other student in the proposed placement unless that other student's parent/guardian consents to the observation or evaluation. The results of any observation or evaluation of another student in violation of Education Code 56329(d) shall be inadmissible in any due process or judicial proceeding regarding FAPE of that other student.

Parent/Guardian Consent for Evaluations

Consent means that the parent/guardian: (Education Code 56021.1; 34 CFR 300.9)

1. Has been fully informed, in the parent/guardian's native language or other mode of communication, of all information relevant to the activity for which consent is sought
2. Understands and agrees, in writing, to the carrying out of the activity for which parent/guardian consent is sought and the consent describes that activity and lists the records (if any) that will be released and to whom

3. Understands that the granting of consent is voluntary on the parent/guardian's part and may be revoked at any time
4. Understands that if the parent/guardian revokes consent, that revocation is not retroactive (i.e., it does not negate an action that has occurred after the consent was given and before the consent was revoked). The district is not required to amend the education records of a student to remove any reference to the student's receipt of special education and services if the student's parent/guardian submits a written revocation of consent after the initial provision of special education and related services to the student.

Upon receiving the proposed evaluation plan, the parent/guardian shall have at least 15 days to decide whether to consent to the initial evaluation. The district shall not interpret parent/guardian consent for initial evaluation as consent for initial placement or initial provision of special education services. (Education Code 56321; 34 CFR 300.300)

The district shall make reasonable efforts to obtain the consent of the parent/guardian for an initial evaluation or reevaluation of a student. (Education Code 56321; 34 CFR 300.300, 300.322)

The district shall maintain a record of its attempts to obtain consent, such as: (Education Code 56341.5)

1. Detailed records of telephone calls made or attempted and the results of those calls
2. Copies of correspondence sent to the parent/guardian and any responses received
3. Detailed records of visits made to the parent/guardian's home or place of employment and the results of those visits

If a parent/guardian refuses to consent to the initial evaluation or fails to respond to a request to provide consent, the district may, but is not required to, pursue an evaluation by utilizing the procedural safeguards, including the mediation and due process procedures pursuant to 20 USC 1415 and 34 CFR 300.506-300.516. (Education Code 56321; 34 CFR 300.300)

For a student who is a ward of the state and not residing with the student's parent/guardian, the district shall make reasonable efforts to obtain the consent from the parent/guardian of the student for an initial evaluation to determine whether the student is a student with a disability. The district may conduct an initial evaluation without obtaining consent if any of the following situations exists: (Education Code 56321.1; 20 USC 1414; 34 CFR 300.300)

1. Despite reasonable efforts to do so, the district cannot discover the whereabouts of the parent/guardian of the student
2. The rights of the parent/guardian of the student have been terminated in accordance with state law
3. The rights of the parent/guardian to make educational decisions have been subrogated by a judge in accordance with state law and consent for an initial evaluation has been given by an individual appointed by the judge to represent the student

The district need not obtain parent/guardian consent before reviewing existing data as part of an evaluation or reevaluation, or before administering a test or other evaluation that is administered to all students, unless consent is required from the parents/guardians of all students. (Education Code 56321; 34 CFR 300.300)

Conduct of the Evaluation

Within 60 calendar days of receiving parental consent for the initial assessment of a student, not counting days between the student's regular school sessions, terms, or days of school vacation in excess of five schooldays, a determination whether the student is eligible for special education and the educational needs of the student shall be made, an IEP team meeting shall occur, and an IEP shall be developed, unless the parent/guardian agrees in writing to an extension, pursuant to Education Code 56344. If the 60-day time is interrupted by a student school vacation, the 60-day time shall recommence on the date that student schooldays reconvene and a meeting to develop an IEP for the student shall be conducted within 30 days of a determination that the student needs special education and

related services. (Education Code 56043, 56344)

However, when a referral has been made for a student 30 days or less prior to the end of the regular school year, an IEP required as a result of an assessment of the student shall be developed within 30 days after the commencement of the subsequent regular school year. (Education Code 56043, 56344; 34 CFR 300.301, 300.323)

The evaluation shall be conducted by qualified personnel who are competent to perform the assessment as determined by the district. (Education Code 56322)

In addition, evaluations and reevaluations shall be administered by qualified personnel who are competent in the oral or sign language skills and written skills of the student's primary language or mode of communication and have a knowledge and understanding of the cultural and ethnic background of the student. If it is clearly not feasible to do so, an interpreter shall be used, and the assessment report shall document this condition and note that the validity of the assessment may have been affected. The normal process of second-language acquisition, as well as manifestations of dialect and sociolinguistic variance shall not be diagnosed as a disabling condition. (5 CCR 3023)

The screening of a student by a teacher or specialist to determine appropriate instructional strategies for curriculum implementation shall not be considered to be an evaluation for eligibility for special education and related services. (Education Code 56321; 20 USC 1414; 34 CFR 300.302)

In conducting the evaluation, the district shall use a variety of assessment tools and strategies to gather relevant functional, developmental, and academic information about the student. The district shall also use any information provided by the parent/guardian that may assist the district in making the determination as to whether the student is a student with a disability and, if so, the necessary components of the student's IEP when the IEP is developed, including information related to enabling the student to be involved in and to progress in the general education curriculum. (34 CFR 300.304)

The district's evaluation shall not use any single measure or assessment as the sole criterion for determining whether a student is a student with a disability and for determining the appropriate educational program for the student. The assessment shall use technically sound instruments that may assess the relative contribution of cognitive and behavioral factors in addition to physical or developmental factors. (Education Code 56320; 34 CFR 300.304)

The district shall also ensure that assessments and other evaluation materials provide relevant information that assists in determining the student's educational needs and are: (Education Code 56320; 34 CFR 300.304)

1. Selected and administered so as not to be discriminatory on a racial, cultural, or sexual basis
2. Provided and administered in the student's native language or other mode of communication and in the form most likely to yield accurate information on what the student knows and can do academically, developmentally, and functionally, unless it is clearly not feasible to so provide or administer
3. Used for the purposes for which the assessments or measures are valid and reliable
4. Administered by trained and knowledgeable personnel except that individually administered tests of intellectual or emotional functioning shall be administered by a credentialed school psychologist
5. Administered in accordance with any instructions provided by the producer of the assessments
6. Tailored to assess specific areas of educational need and not merely designed to provide a single general intelligence quotient
7. If administered to a student with impaired sensory, manual, or speaking skills, selected and administered to best ensure that the results accurately reflect the student's aptitude or achievement level or whatever other factors the test purports to measure, rather than reflecting the child's impaired sensory, manual, or speaking skills (unless those skills are the factors that the test purports to measure).

Students shall be assessed in all areas related to the suspected disability, including, if appropriate, health and development, vision (including low vision), hearing, motor abilities, language function, general intelligence, academic performance, communicative status, self-help, orientation and mobility skills, career and vocational abilities and interests, and social and emotional status. When appropriate, a developmental history shall be obtained. For students with residual vision, a low vision assessment shall be provided in accordance with guidelines established pursuant to Education Code 56136. The district shall ensure that the evaluation is sufficiently comprehensive to

identify all of the student's special education and related service needs, whether or not commonly linked to the disability category in which the student has been classified. (Education Code 56320; 34 CFR 300.304)

As part of the initial evaluation and any reevaluation, the IEP team and other qualified professionals shall, if appropriate, review existing evaluation data on the student, including evaluations and information provided by the parents/guardians, current classroom-based local or state assessments and classroom-based observations, and observations by teachers and related services providers. On the basis of that review and input from the student's parent/guardian, the team shall identify what additional data, if any, are needed to determine: (Education Code 56381; 34 CFR 300.305)

1. Whether the student is a student with a disability, or in the case of a reevaluation, whether the student continues to have a disability, and the educational needs of the student
2. The present levels of academic achievement and related developmental needs of the student
3. Whether the student needs, or continues to need, special education and related services
4. Whether any additions or modifications to the special education and related services are needed to enable the student to meet the measurable annual goals set out in the student's IEP and to participate, as appropriate, in the general education curriculum

If a student has transferred from another district in the same school year or leaves this district, the district shall coordinate with the student's prior or subsequent district as necessary and as expeditiously as possible to ensure prompt completion of full evaluations. (Education Code 56320; 34 CFR 300.304)

Evaluation Report

The personnel who evaluate the student shall prepare a written report of the results of each evaluation. The report shall include, but not be limited to, the following: (Education Code 56327)

1. Whether the student may need special education and related services
2. The basis for making the determination
3. The relevant behavior noted during the observation of the student in an appropriate setting
4. The relationship of that behavior to the student's academic and social functioning
5. The educationally relevant health, developmental, and medical findings, if any
6. For students with learning disabilities, whether there is such a discrepancy between achievement and ability that it cannot be corrected without special education and related services
7. A determination concerning the effects of environmental, cultural, or economic disadvantage, where appropriate
8. The need for specialized services, materials, and equipment for students with low incidence disabilities, consistent with Education Code 56136

Eligibility Determination

Upon completion of the administration of assessments and other evaluation measures, a group of qualified professionals and the parent/guardian shall determine whether the student is a student with a disability as defined in 5 CCR 3030 and 34 CFR 300.8 and, if so, the student's educational needs. In interpreting the data, the group shall draw information from a variety of sources, including aptitude and achievement tests, parent/guardian input, and teacher recommendations, as well as information about the student's physical condition, social or cultural background, and adaptive behavior. The group shall ensure that the information obtained from these sources is documented and carefully considered. (34 CFR 300.306)

When making a determination of eligibility for special education and related services, the district shall not determine

that a student is disabled if the primary factor for such determination is a lack of appropriate instruction in reading, including the essential components of reading instruction pursuant to 20 USC 6368, lack of instruction in mathematics, limited English proficiency, or that the student does not otherwise meet the eligibility criteria. (Education Code 56329; 34 CFR 300.306)

The normal process of second-language acquisition, as well as manifestations of dialect and sociolinguistic variance, shall not be diagnosed as a disabling condition. (5 CCR 3023)

Independent Educational Evaluation

An *independent educational evaluation* is defined as an evaluation conducted by a qualified examiner who is not employed by the district. (34 CFR 300.502)

Public expense means that the district either pays for the full cost of the IEE or ensures that the evaluation is otherwise provided at no cost to the parent/guardian. (34 CFR 300.502)

The parents/guardians of a student with a disability have the right to obtain an IEE at public expense under the same criteria, including the location of the evaluation and the qualifications of the examiner, that the district uses for a district-initiated evaluation. (34 CFR 300.502)

The parent/guardian is entitled to only one IEE at public expense each time the district conducts an evaluation with which the parent/guardian disagrees. (Education Code 56329; 34 CFR 300.502)

If a parent/guardian has requested an IEE, the district may ask for the reason that the parent/guardian objects to the district's evaluation. However, the parent/guardian is not required to provide an explanation and the district may not unreasonably delay either providing the IEE at public expense or filing a due process complaint to request a due process hearing to defend the public evaluation. (34 CFR 300.502)

Upon receiving the request for an IEE, the district shall, without unnecessary delay, either: (34 CFR 300.502)

1. File a due process complaint to request a hearing to show that its evaluation is appropriate
2. Ensure that an IEE is provided at public expense, unless the district demonstrates at a hearing that the evaluation obtained by the parent/guardian did not satisfy the district's criteria

If a due process hearing decision determines that the district's evaluation is appropriate, then the parent/guardian may obtain an IEE but not at public expense. (Education Code 56329; 34 CFR 300.502)

In any decision made with respect to providing FAPE to a student with a disability, the result of any IEE obtained by the student's parent/guardian shall be considered by the district if it meets district criteria. Any such result also may be presented as evidence at a hearing on a due process complaint. (Education Code 56329; 34 CFR 300.502)

Coordinating Transitions

The district designates the individual listed below as the main point of contact for coordinating and completing, with other agencies and persons, the transition of a child and family from infant/toddler programs to preschool (Part C to Part B of the federal Individuals with Disabilities Education Act), including establishing practices to educate and support families during the transition: (Government Code 95008)

Special Education Director _____

(title or position)

4949 Foxen Canyon Rd., Santa Maria, CA 93454 _____

(address)

805-937-1148 _____

(telephone number)

sorzoco@blochmanusd.org _____

(email)

Reevaluation

A reevaluation shall be conducted when the district determines that the educational or related service needs of the student, including improved academic achievement and functional performance, warrant a reevaluation or if the student's parent/guardian or teacher requests reevaluation. Such reevaluations shall occur every three years, unless the parent/guardian and district agree in writing that a reevaluation is unnecessary. A reevaluation may not occur more than once a year, unless the parent/guardian and the district agree otherwise. (Education Code 56043, 56381; 34 CFR 300.303)

The district shall ensure that any reevaluations of the student are conducted in accordance with the evaluation procedures pursuant to 34 CFR 300.304-300.311. (34 CFR 300.303)

Before entering kindergarten or first grade, as the case may be, children with disabilities who are in a preschool program shall be reevaluated to determine if they still need special education and services. IEP teams shall identify a means of monitoring the continued success of children who are determined to be eligible for less intensive special education programs. (Education Code 56445)

The district's point of contact for coordinating and completing the transition of a child and family from infant/toddler programs to preschool, may coordinate the reevaluation and monitoring as described above for kindergarten or first grade.

Bylaw 9220: Governing Board Elections

Status: DRAFT

Original Adopted Date: 11/14/2017

Board Member Qualifications

Any person is eligible to be a member of the Governing Board, without further qualifications, if the person is 18 years of age or older, a citizen of California, a resident of the school district or, if applicable, the trustee area, a registered voter, and not legally disqualified from holding civil office. Any person who has been convicted of a felony involving the giving, accepting, or offering of a bribe, embezzlement or theft of public funds, extortion, perjury, or conspiracy to commit any such crime, under California law or the law of another state, the United States of America, or another country, is not eligible to be a candidate for office or elected as a Board member except when the person has been granted a pardon in accordance with law. (Education Code 35107; Elections Code 20)

A district employee elected to the Board shall resign from district employment before being sworn in or shall have the employment automatically terminated upon being sworn into office. (Education Code 35107)

The Board encourages all candidates to become knowledgeable about the role of board members. The Superintendent or designee shall provide all candidates with information that will enable them to understand the responsibilities and expectations of being a Board member, including information regarding available workshops, seminars, and/or training. The Superintendent or designee shall provide all candidates with the county election official's contact information and general information about school programs, district operations, and Board responsibilities.

Recalling a Board Member

A Board member may be recalled as permitted by Elections Code 11000. Proponents of a recall are required to serve, file, and publish or post a notice of intention to circulate the recall petition and to comply with other applicable law and formalities and county elections official directives. The petition, pursuant to Elections Code 11041, is required to be in the format provided by the Secretary of State and to include an estimate of the cost of conducting the special election, as determined by the county elections official, in consultation with the district.

Within 14 days after the meeting at which the Board receives a certificate of sufficiency of signatures on a recall petition from the county elections official, the Board shall order an election to be held to determine whether the Board member named in the petition shall be recalled. The election shall be held not less than 88, nor more than 125, days after the date that the Board orders the election. However, the election may be conducted within 180 days after the issuance of the Board's order to consolidate the election with a regularly scheduled election.

Recall elections shall be conducted in accordance with Elections Code 11381-11386.

Consolidation of Elections

To reduce costs associated with conducting elections, the Board may consolidate Board elections with the local municipal or statewide primary or general election in accordance with Elections Code 1302.

In addition, if a regularly scheduled Board election held other than on a statewide election date results in a decrease in local voter turnout of 25 percent or more compared to the average local turnout for the previous four statewide general elections, the Board shall take action to consolidate Board elections with statewide elections. (Elections Code 14051, 14052)

In order to consolidate elections based on either circumstance described above, the Board shall adopt a resolution and submit it to the County Board of Supervisors for approval not later than 240 days prior to the date of the currently scheduled district election. (Elections Code 10404.5)

Whenever a regularly scheduled Board election is changed due to consolidation of elections, the terms of office of incumbent Board members shall be extended to align with the next applicable election. (Elections Code 10404.5)

Elections Process and Procedures

Board members may reside anywhere within the district's boundaries and shall be elected by all voters in the district.

To ensure ongoing compliance with the California Voting Rights Acts, the Board may review the district's Board election method to determine whether any modification is necessary due to changes in the district's population or any of its racial, color, or language minority group composition. The review shall be based on the Superintendent or designee's report to the Board after the release of each decennial federal census.

When the district's election method is to be changed, the Board shall hold public hearings in accordance with Elections Code 10100 before adopting a resolution at an open meeting specifying the change(s), and shall, in accordance with Education Code 5019, obtain approval from the county committee on school district organization having jurisdiction over the district.

The election method or trustee-area boundaries in effect at the beginning of a Board member's term shall be used when any vacancy that occurs during that term is to be filled, even if, during the term, the district has adopted "by-trustee area" election method or trustee area boundaries have been adjusted.

Any petition for a special election ordered pursuant to Education Code 5091 shall contain the county election official's estimate of the cost of conducting the special election, expressed on a per-student basis. (Education Code 5091)

Campaign Conduct

All candidates, including current Board members running as incumbents, shall abide by local, county, state, and federal requirements regarding campaign donations, funding, and expenditures.

A Board member shall not expend, and a candidate shall not accept, any public money for the purpose of seeking elective office. However, the district may establish a dedicated fund for those seeking election to the Board, provided that the funds are available to all candidates who are qualified pursuant to Education Code 35107 without regard to incumbency or political preference. (Government Code 85300)

In order to help protect the public's trust in the electoral process as well as the public's confidence in the Board and district, the Board encourages all candidates to sign and adhere to the principles in the Code of Fair Campaign Practices pursuant to Elections Code 20440.

Statement of Qualifications

On the 125th day prior to the day fixed for the general district election, the Board secretary or designee shall deliver a notice, bearing the secretary's signature and district seal, to the county elections official describing both of the following: (Elections Code 10509)

1. The elective offices of the district to be filled at the general election and which offices, if any, are for the balance of an unexpired term
2. Whether the district or the candidate is to pay for the publication of a statement of qualifications pursuant to Elections Code 13307

Candidates for the Board may submit a candidate statement to the elections official for inclusion in the voter's pamphlet. Candidate statements shall be limited to no more than 200 words. (Elections Code 13307)

When the elections official allows for the electronic distribution of candidate statements, a candidate for the Board may, in addition to or instead of submitting a candidate statement for inclusion in the mailed voter's pamphlet, prepare and submit a candidate statement for electronic distribution.

The district shall assume no part of the cost of printing, handling, translating, mailing, or electronically distributing candidate statements filed pursuant to Elections Code 13307. As a condition of having candidate statements included in the hard copy and/or electronic voter's pamphlet, the district may require candidates to pay their estimated pro rata share of these costs to the district in advance pursuant to Elections Code 13307.

Tie Votes in Board Member Elections

Whenever a tie makes it impossible to determine which of two or more candidates has been elected to the Board, the Board shall immediately notify the candidates who received the tie votes of the time and place where the candidates or their representatives should appear before the Board. The Board at that time shall determine the winner by lot. (Education Code 5016)

Bylaw 9223: Filling Vacancies

Status: DRAFT

Original Adopted Date: 11/14/2017

Events Causing a Vacancy

A vacancy on the Governing Board may arise from any of the following events:

1. The death of an incumbent (Government Code 1770)
2. The adjudication pursuant to a quo warranto proceeding declaring that an incumbent is physically or mentally incapacitated due to disease, illness, or accident and that there is reasonable cause to believe that the incumbent will not be able to perform the duties of the office for the remainder of the term (Government Code 1770)
3. A Board member's resignation (Government Code 1770)

A vacancy resulting from resignation occurs when the written resignation is filed with the County Superintendent of Schools having jurisdiction over the district, except where a deferred effective date is specified in the resignation so filed, in which case the resignation shall become operative on that date. A Board member may not defer an effective date of resignation for more than 60 days after the date the resignation is filed with the County Superintendent. Upon being filed with the County Superintendent, a written resignation, whether specifying a deferred effective date or otherwise, shall be irrevocable. (Education Code 5090, 5091)

4. A Board member's removal from office by recall (Elections Code 11000; Government Code 1770)
5. A Board member's ceasing to be a resident of the district (Government Code 1770)
6. A Board member ceases to inhabit the trustee area represented on the Board (58 Ops.Cal.Atty.Gen. 888 (1975))
7. A Board member's absence from the state for more than 60 days, except in the following situations: (Government Code 1064, 1770)
 - a. Upon district business with the approval of the Board
 - b. With the consent of the Board for an additional period not to exceed a total absence of 90 days
 - c. In the case of illness or other urgent necessity, and upon a proper showing thereof, the time limited for absence from the state may be extended by the Board
 - d. For federal military deployment, not to exceed an absence of a total of six months, as a member of the armed forces of the United States or the California National Guard

If the absence of the Board member for this purpose exceeds six months, the Board may approve an additional six-month absence upon a showing that there is a reasonable expectation that the member will return within the second six-month period, and the Board may appoint an interim member to serve during the absence. If two or more members of the Board are absent by reason of these circumstances, and those absences result in the inability to establish a quorum at a regular meeting, the Board may immediately appoint one or more interim members as necessary to enable the Board to conduct business and discharge its responsibilities. The term of an interim member appointed in these circumstances shall not extend beyond the return of the absent Board member or beyond the next regularly scheduled election for that office, whichever occurs first.

8. A Board member's ceasing to discharge the duties of the office for the period of three consecutive months, except when prevented by illness or when absent from the state with the permission required by law (Government Code 1770)
9. A Board member's conviction of a felony or any offense involving a violation of official duties or conviction of a designated crime resulting in a forfeiture of office (Government Code 1770, 3000-3003)

10. A Board member's refusal or neglect to file the required oath within the time prescribed (Government Code 1770)
11. The decision of a competent tribunal declaring void a Board member's election or appointment (Government Code 1770)
12. A Board member's commitment to a hospital or sanitarium as a drug addict, dipsomaniac, inebriate, or stimulant addict by a court of competent jurisdiction, in which case the office shall not be deemed vacant until the order of commitment has become final (Government Code 1770)
13. A "failure to elect" in which no candidate or an insufficient number of candidates have filed to run for a Board seat(s) (Education Code 5090, 5326, 5328)

Timelines for Filling a Vacancy

When a vacancy occurs, the Board shall take the following action, as appropriate:

1. When a vacancy occurs within four months of the end of a Board member's term, the Board shall take no action. (Education Code 5093)
2. When a vacancy occurs from six months to 130 days before a regularly scheduled Board election at which the position is not scheduled to be filled, a special election to fill the position shall be consolidated with the regular election. The person so elected shall take office at the first regularly scheduled Board meeting following the certification of the election and shall serve only until the end of the term of the position which the person was elected to fill. (Education Code 5093)
3. When a vacancy occurs outside of the statutory time windows identified in Items #1 and #2 above, the Board shall, within 60 days of the date of the vacancy or the filing of the member's deferred resignation, either order an election or make a provisional appointment. (Education Code 5091, 5093)

Eligibility

In order to be appointed or elected to fill a vacancy on the Board, a person must meet the eligibility requirements specified in Education Code 35107, as described in BB 9220 - Governing Board Elections.

Provisional Appointments

When authorized by law to make a provisional appointment to fill a vacancy on the Board, the Board shall advertise in the local media to solicit candidate applications or nominations. A committee consisting of less than a quorum of the Board shall ensure that applicants are eligible for Board membership and announce the names of the eligible candidates. The Board shall interview the candidates at a public meeting, accept oral or written public input, and select the provisional appointee by majority vote.

Within 10 days after the appointment is made, the Board shall post notices of the actual vacancy, or the filing of a deferred resignation, and the provisional appointment. The notice shall be published in the local newspaper pursuant to Government Code 6061 and posted in at least three public places within the district. (Education Code 5092)

The notice shall contain: (Education Code 5092)

1. The date of the occurrence of the vacancy or the date of the filing of, and the effective date of, the resignation
2. The full name of the appointee
3. The date of appointment
4. A statement notifying the voters that unless a petition calling for a special election pursuant to Education Code 5091 is filed in the office of the County Superintendent within 30 days of the provisional appointment, it shall become an effective appointment

The person appointed shall hold office until the next regularly scheduled election for district Board members and

shall be afforded all the powers and duties of a Board member upon appointment. (Education Code 5091)

If within 30 days of the Board's appointment, registered voters of the district or, where elections are by trustee areas, of the trustee area submit a petition for special election which the County Superintendent determines to be legally sufficient, the provisional appointment is terminated, and a special election shall be held in accordance with Education Code 5091 to fill the vacancy.

Appointment Due to Failure to Elect

When a vacancy occurs because no candidate or an insufficient number of candidates have been nominated (i.e., a failure to elect) and a district election will not be held, the Board shall appoint a qualified person to the office. This appointment shall be made at a meeting prior to the day fixed for the election and the appointee shall be seated at the organizational meeting as if elected at the district election. (Education Code 5328)

When an appointment is being made because of a failure to elect, the district shall publish a notice once in a newspaper of general circulation published in the district, or if no such newspaper exists, in a newspaper having general circulation within the district. This notice shall state that the Board intends to make an appointment and shall inform persons of the procedure available for applying for the appointment. (Education Code 5328.5)

The procedure for selecting and interviewing candidates shall be the same as the procedures for "Provisional Appointments," as specified above.

Bylaw 9323: Meeting Conduct

Status: DRAFT

Original Adopted Date: 11/14/2017 | **Last Revised Date:** 12/10/2019

Meeting Procedures

All Governing Board meetings shall begin on time and shall be guided by an agenda prepared in accordance with Board bylaws and posted and distributed in accordance with the Ralph M. Brown Act (open meeting requirements) and other applicable laws.

The Board president shall conduct Board meetings in accordance with Board bylaws and procedures that enable the Board to efficiently consider issues and carry out the will of the majority.

The Board believes that late night meetings deter public participation, can affect the Board's decision-making ability, and can be a burden to staff. Regular Board meetings shall be adjourned by 10:30 p.m. unless extended to a specific time determined by a majority of the Board. The meeting shall be extended no more than once and, if necessary, may subsequently be adjourned to a later date.

Quorum and Abstentions

The Board shall act by majority vote of all of the membership constituting the Board. (Education Code 35164)

The Board believes that when no conflict of interest requires abstention, its members have a duty to vote on issues before them. When a member abstains, the abstention shall not be counted for purposes of determining whether a majority of the membership of the Board has taken action.

Provided the Board typically has seven members and there are no more than two vacancies on the Board, the vacant position(s) shall not be counted for purposes of determining how many members of the Board constitute a majority. In addition, whenever any provisions of the Education Code require unanimous action of all or a specific number of the members, the vacant position(s) shall not be counted for purposes of determining the total membership constituting the Board. (Education Code 35165)

Public Participation

Members of the public are encouraged to attend Board meetings and to address the Board concerning any item on the agenda or within the Board's jurisdiction. So as not to inhibit public participation, persons attending Board meetings shall not be requested to sign in, complete a questionnaire, or otherwise provide their name or other information as a condition of attending the meeting, except that if the meeting is conducted using remote public participation or with a Board member attending remotely pursuant to Government Code 54953, a member of the public desiring to provide comment through the use of a third party internet website or online platform may be required to register as required by the third party provider.

In order to conduct district business in an orderly and efficient manner, the Board requires that public presentations to the Board comply with the following procedures:

1. The Board shall give members of the public an opportunity to address the Board on any item of interest to the public that is within the subject matter jurisdiction of the Board, either before or during the Board's consideration of the item. (Education Code 35145.5; Government Code 54954.3)
2. At a time so designated on the agenda at a regular meeting, members of the public may bring before the Board matters that are not listed on the agenda. The Board shall take no action or discussion on any item not appearing on the posted agenda, except as authorized by law. (Education Code 35145.5; Government Code 54954.2)

3. Without taking action, Board members or district staff members may briefly respond to statements made or questions posed by the public about items not appearing on the agenda. Additionally, on their own initiative or in response to questions posed by the public, Board members or staff members may ask a question for clarification, make a brief announcement, or make a brief report on their own activities. (Government Code 54954.2)

Furthermore, the Board or a Board member may provide a reference to staff or other resources for factual information, ask staff to report back to the Board at a subsequent meeting concerning any matter, or take action directing staff to place a matter of business on a future agenda. (Government Code 54954.2)

4. The Board need not allow the public to speak on any item that has already been considered by a committee composed exclusively of Board members at a public meeting where the public had the opportunity to address the committee on that item. However, if the Board determines that the item has been substantially changed since the committee heard the item, the Board shall provide an opportunity for the public to speak. (Government Code 54954.3)
5. A person wishing to be heard by the Board shall first be recognized by the president and shall then proceed to comment as briefly as the subject permits.

In general, individual speakers will be allowed three minutes to address the Board on each agenda or nonagenda item, and the Board will limit the total time for public input on each item to 20 minutes. However, in exceptional circumstances when necessary to ensure full opportunity for public input, the Board president may, with Board consent, adjust the amount of time allowed for public input and/or the time allotted for each speaker. Any such adjustment shall be done equitably so as to allow a diversity of viewpoints. The president may also ask members of the public with the same viewpoint to select a few individuals to address the Board on behalf of that viewpoint.

In order to ensure that non-English speakers receive the same opportunity to directly address the Board, any member of the public who utilizes a translator shall be provided at least twice the allotted time to address the Board, unless simultaneous translation equipment is used to allow the Board to hear the translated public testimony simultaneously. (Government Code 54954.3)

6. The Board president may rule on the appropriateness of a topic, subject to the following conditions:
 - a. If a topic would be suitably addressed at a later time, the Board president may indicate the time and place when it should be presented.
 - b. The Board shall not prohibit public criticism of its policies, procedures, programs, services, acts, or omissions. (Government Code 54954.3)
 - c. The Board shall not prohibit public criticism of district employees. However, whenever a member of the public initiates specific complaints or charges against an individual employee, the Board president shall inform the complainant of the appropriate complaint procedure.
7. The Board president shall not permit actual disruption of Board meetings. Actual disruption by an individual or group or any conduct or statements that threaten the safety of any person(s) at the meeting shall be grounds for the president to terminate the privilege of addressing the Board and remove the individual from the meeting.

The Board President or designee may remove an individual for actually disrupting the meeting. Prior to removal, the individual shall be warned that their behavior is disrupting the meeting and that failure to cease the disruptive behavior may result in removal. If, after being warned, the individual does not promptly cease the disruptive behavior, the Board president, or designee, may then remove the individual from the meeting. (Government Code 54957.95)

When an individual's behavior constitutes the use of force or a true threat of force, the individual shall be removed from a Board meeting without a warning. (Government Code 54957.95)

Disrupting means engaging in behavior during a Board meeting that actually disrupts, disturbs, impedes, or renders infeasible the orderly conduct of the meeting and includes, but is not limited to, a failure to comply with reasonable and lawful regulations adopted by a legislative body pursuant to Section 54954.3 or any other law, or engaging in behavior that constitutes use of force or a true threat of force. (Government Code 54957.95)

True threat of force means a threat that has sufficient indicia of intent and seriousness, that a reasonable observer would perceive it to be an actual threat to use force by the person making the threat. (Government Code 54957.95)

Additionally, the Board may order the room cleared if necessary. In this case, members of the media not participating in the disturbance shall be allowed to remain, and individuals not participating in such disturbances may be allowed to remain at the discretion of the Board. When the room is ordered cleared due to a disturbance, further Board proceedings shall concern only matters appearing on the agenda. (Government Code 54957.9)

When disruptive conduct occurs, the Board may decide to recess the meeting to help restore order, or if removing the disruptive individual(s) or clearing the room is infeasible, move the meeting to another location. The Board may direct the Superintendent or designee to contact local law enforcement as necessary.

Recording by the Public

Members of the public may record an open Board meeting using an audio or video recorder, still or motion picture camera, cell phone, or other device, provided that the noise, illumination, or obstruction of view does not persistently disrupt the meeting. The Superintendent or designee may designate locations from which members of the public may make such recordings without causing a distraction.

If the Board finds that noise, illumination, or obstruction of view related to these activities would persistently disrupt the proceedings, these activities shall be discontinued or restricted as determined by the Board. (Government Code 54953.5, 54953.6)
