



## TACMO Board Meeting - January 21, 2025 Agenda

Jan 21st 2025 6:30pm - 8:30pm

Blue Oak Academy (Multi-Purpose Room) and Sycamore Valley Academy (Multi-Purpose Room)

In order to ensure that members of the public are provided a meaningful opportunity to address the Board on non-agenda items or agenda items that are within the Board's jurisdiction, non-agenda items may be addressed at the public comment portion of the agenda and agenda items may be addressed at the time the matter is considered by the Board. During the evening, many of the Board members will be speaking on various subjects. It should be noted that each Board member expresses only his/her opinion and not the opinion of the entire Board. Teleconferencing may be used for all purposes in connection with any meeting. All votes taken during a teleconferenced meeting shall be by roll call.

If documents are distributed to Board members concerning an agenda item within 72 hours of a regular Board meeting, at the same time the documents will be made available for public inspection. Interested members of the public may request to see the same documents by emailing the Superintendent at [dball@theacademiescharters.org](mailto:dball@theacademiescharters.org) and the complete packet will be shared electronically.

This meeting is held in an area accessible to the disabled. In compliance with the American Disabilities Act, if you need special assistance to participate in meetings, call (559) 429-4351 forty-eight (48) hours in advance of the meeting. Persons who are in need of disability-related modification or accommodation in order to participate in the Board meeting may make a request to Donya Ball at PO Box 1189, Visalia, CA 93279 and (559) 429-4351. Such a request should be in writing if possible or may be made in person or by telephone. The request should specify the nature of the accommodation or modification requested, including any auxiliary aids or services requested, and the name, address, and telephone number of the person making the request.

### 1. OPENING BUSINESS

6:30pm

#### 1.1. ADA ACCOMMODATIONS

1.1.1 **This meeting is held in an area accessible to the disabled. In compliance with the American Disabilities Act, if you need special assistance to participate in meetings, call (559) 429-4351 at CMO Home Office forty-eight (48) hours in advance of the meeting. Persons who are in need of disability-related modification or accommodation in order to participate in the Board meeting may make a request to Donya Ball at PO Box 1189, Visalia, CA 93279 or (559) 429-4351. Such a request should be in writing if possible or may be made in person or by telephone. The request should specify the nature of the accommodation or modification requested, including any auxiliary aids or services requested, and the name, address, and telephone number of the person making the request.**

1.1.2 **If documents are distributed to Board members concerning an agenda item within 72 hours of a regular Board meeting, at the same time the documents will be made available for public inspection. Interested**

members of the public may request to see the same documents by emailing the Superintendent (d~~ball~~@theacademiescharters.org), and the complete packet will be shared electronically.

- 1.2. IDENTIFY CLOSED SESSION TOPICS OF DISCUSSION
- 1.3. PUBLIC COMMENT ON CLOSED SESSION TOPICS
  - 1.3.1 General public comment on any closed session item will be heard. The Board may limit individual comments to no more than 3 minutes and individual topics to 20 minutes. Please begin your comments by stating your name.
- 1.4. ADJOURN TO CLOSED SESSION
- 1.5. CALL PUBLIC SESSION TO ORDER
2. CLOSED SESSION
  - 2.1. PERSONNEL (Government Code § 54957). It is the intention of this governing body to meet in closed-session to consider public employee appointment/employment for the position of: Enrichment Aide, Special Education Aide
  - 2.2. PERSONNEL (Government Code § 54957). It is the intention of this governing body to meet in closed-session to consider the discipline, dismissal or release of a public employee.
3. REGULAR SESSION RECONVENED
  - 3.1. General public comment on any school related topic may be heard at this time. The Board asks that any public comment on an item listed on tonight's agenda be addressed at the time the item comes up for discussion by the Board. Pursuant to Board Policy, the Board may limit individual comments to no more than 3 minutes and individual topics to 20 minutes. Please begin your comments by stating your name.
  - 3.2. REPORT ACTION TAKEN IN CLOSED SESSION (if any)
  - 3.3. CALL PUBLIC SESSION TO ORDER
4. CONSENT AGENDA
  - 4.1. ADMINISTRATIVE SERVICES
    - 4.1.1 There are no Administrative Services items to discuss this evening.

## 4.2. SUPERINTENDENT'S OFFICE

### 4.2.1 Approval of Minutes of the board meeting on December 10, 2024 (Enc. No. 1)

 [TACMO BOD 12102024 Meeting Minutes DRAFT.pdf](#)

### 4.2.2 Approval of the November and December 2024 Check Register Reports (Enc. No. 2)

 [TACMO November 2024 Combined Board Check Register.pdf](#)

 [TACMO December 2024 Combined Board Check Register.pdf](#)

### 4.2.3 Donation Recognition (Enc. No. 3)

 [Donations January 2025.pdf](#)

### 4.2.4 Monthly Attendance Reports for BOA and SVA (Enc. No. 4)

 [BOA December Attendance Report.pdf](#)

 [Month 5 SVA Attendance Report.pdf](#)

## 5. PUBLIC RECOGNITION/PROCLAMATIONS/ACTION

5.1. There are no Public Recognition/Proclamations items to include this evening.

## 6. PROGRAM UPDATE & BOARD DEVELOPMENT

Presentation/Public Hearing/Public Comment/Board Discussion

### 6.1. Program Update

6.1.1 There are no Program Update items to include this evening.

### 6.2. Board Development

6.2.1 There are no Board Development items to include this evening.

## 7. COMMUNITY REPORTS

Presentation/Public Hearing/Public Comment/Board Discussion

### 7.1. Superintendent Report

7.1.1 2025-2026 Budget and LCAP Timeline (Enc. No. 5)

 [25-26 LCAP Timeline.pdf](#)

7.1.2 Transportation Update for Sycamore Valley Academy for 2025-2026 School Year

7.2. Human Resources Director Report

7.3. Teacher Representative Report

7.4. Operations Director Report

7.5. Principal Report

7.5.1 Extra and co-curricular activities at Sycamore Valley Academy

7.5.2 Extra and co curricular activities at Blue Oak Academy

7.6. Board Member Report

8. ADMINISTRATIVE PANEL RECOMMENDATIONS/ACTIONS

Review/Public Hearing/Public Input/Board Discussion/ACTION (as applicable)

8.1. There are no Administrative Panel items to discuss this evening.

9. GENERAL AGENDA

Review/Public Hearing/Public Input/Board Discussion/ACTION (as applicable)

9.1. Monthly Financials Presentation (Enc. No. 6) ACTION

 [TACMO Jan 25 Board Presentation-FY25 December.pdf](#)

9.2. 2024-2025 Approval of Audit Services (Enc. No. 7) ACTION

Christy White (virtual)-\$25,500

WHK (hybrid)- \$26,000


CLA (virtual)- \$26,500

 [Audit Proposal- Christy White.pdf](#)


 [Audit Proposal- CLA.pdf](#)

 [Audit Proposal- WHK.pdf](#)


9.3. 2023-2024 School Accountability Report Card for Blue Oak Academy (Enc. No. 8) ACTION

 [2024\\_School\\_Accountability\\_Report\\_Card\\_Blue\\_Oak\\_Academy\\_20250110 \(2\).pdf](#)

9.4. **2023-2024 School Accountability Report Card for Sycamore Valley Academy (Enc. No. 9) ACTION**


 [2024\\_School\\_Accountability\\_Report\\_Card\\_Sycamore\\_Valley\\_Academy\\_School\\_20250109.pdf](#)

9.5. **2025 LCAP Mid-Year Monitoring Report for the 2024-2025 LCAP for Blue Oak Academy (Enc. No. 10)**

 [2025\\_LCAP\\_Mid-Year\\_Monitoring\\_Report\\_for\\_the\\_2024-25\\_LCAP\\_Blue\\_Oak\\_Academy\\_20250115-2.pdf](#)

 [Blue Oak Academy 24-25 LCAP Mid Year Presentation FINAL.pdf](#)

9.6. **2025 LCAP Mid-Year Monitoring Report for the 2024-2025 LCAP for Sycamore Valley Academy (Enc. No. 11)**

 [2025\\_LCAP\\_Mid-Year\\_Monitoring\\_Report\\_for\\_the\\_2024-25\\_LCAP\\_Sycamore\\_Valley\\_Academy\\_School\\_20250115.pdf](#)

 [Sycamore Academy 24-25 LCAP Mid Year Presentation .pdf](#)


9.7. **Annual TACMO Board Governing Election (Enc. No. 12) ACTION**

 [CMO Governing Board\\_Board Terms and Titles \(2024-25\).pdf](#)

9.8. **Board Resolution 25-001 Annual Reorganization of Board Officers (Enc. No. 13) ACTION**

 [BR 25-001 Annual Reorganization of Board Offices.pdf](#)

9.9. **Board Resolution 25-002 Authorizing Superintendent to Apply for Grants in 2025 (Enc. No. 14) ACTION**

 [BR 25-002 Authorizing Superintendent to apply for grants in 2025 calendar year.pdf](#)

10. **ADJOURNMENT**

10.1. **Request for future Board Agenda items**

10.2. **The next The Academies CMO board meeting: February 18, 2025 at 6:30 PM.**

END  
8:30pm



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# TACMO BOARD MEETING DECEMBER 10, 2024

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## Minutes



TUESDAY, DECEMBER 10, 2024

6:30 PM – 8:30 PM PDT

Blue Oak Academy (Multi-purpose Room & Sycamore Valley Academy (Multi-purpose Room)

### IN ATTENDANCE:

Mary Aceves, Donya Ball, Sheridyn Blain, Shauna Dolin, Cristina Gutierrez, Marilou Monsivais, Corey Morse, Stacey Nelson, Harold Rollin, Staci Soares, Mackenzie Souza, Alex Tietjen, Claudia Van Groningen, Alexis Vance

**1. OPENING BUSINESS**

Others in attendance: Eric Anderson, Jennifer Denham, Devon Enos, Janell Geiger, Jocelyn Hendershot, Cristina Johnson, Meagan Miller, Judah Tanner, and Lauren Ventura

**1.1. CALL PUBLIC SESSION TO ORDER**

Rollin called the meeting to order at 6:30 PM.

**1.2. ADA ACCOMMODATIONS**

**1.2.1.** This meeting is held in an area accessible to the disabled. In compliance with the American Disabilities Act, if you need special assistance to participate in meetings, call (559) 429-4351 at CMO Home Office forty-eight (48) hours in advance of the meeting. Persons who are in need of disability-related modification or accommodation in order to participate in the Board meeting may make a request to Donya Ball at PO Box 1189, Visalia, CA 93279 or (559) 429-4351. Such a request should be in writing if possible or may be made in person or by telephone. The request should specify the nature of the accommodation or modification requested, including any auxiliary aids or services requested, and the name, address, and telephone number of the person making the request.

**1.2.2.** If documents are distributed to Board members concerning an agenda item within 72 hours of a regular Board meeting, at the same time the documents will be made available for public inspection. Interested members of the public may request to see the same documents by emailing the Superintendent (dball@theacademiescharters.org), and the complete packet will be shared electronically.

**1.3. IDENTIFY CLOSED SESSION TOPICS OF DISCUSSION**

Rollin identified closed session topics and moved closed session to the end of the meeting.

**1.4. PUBLIC COMMENT ON CLOSED SESSION TOPICS**

**1.4.1.** General public comment on any closed session item will be heard. The Board may limit individual comments to no more than 3 minutes and individual topics to 20 minutes. Please begin your comments by stating your name.

There was no public comment this evening.

**1.5. ADJOURN TO CLOSED SESSION**

Rollin called closed session to order at 8:36 PM.

**2. CLOSED SESSION**

**2.1. PERSONNEL** (Government Code § 54957). It is the intention of this governing body to meet in closed-session to consider public employee appointment/employment for the position of: Core Academic Teacher, Instructional Aides, Special Education Aide, Behavior Technician Aide, and After School Program Aides

**3. REGULAR SESSION RECONVENED**

**3.1. CALL PUBLIC SESSION TO ORDER**

Rollin called public session back to order at 8:55 PM.

**3.2. REPORT ACTION TAKEN IN CLOSED SESSION (if any)**

Rollin reported the board voted 6-0 to approve the following hires and appointments: Core Academic Teacher, Instructional Aides, Special Education Aide, Behavior Technician Aide, and After School Program Aides

**3.3.** General public comment on any school related topic may be heard at this time. The Board asks that any public comment on an item listed on tonight's agenda be addressed at the time the item comes up for discussion by the Board. Pursuant to Board Policy, the Board may limit individual comments to no more than 3 minutes and individual topics to 20 minutes. Please begin your comments by stating your name.

There was no public comment this evening.

**4. CONSENT AGENDA**

Rollin identified items 4.1 and 4.2. Items were deemed approved by general consent.

**4.1. ADMINISTRATIVE SERVICES**

**4.1.1.** There are no Administrative Services items to discuss this evening.

**4.2. SUPERINTENDENT'S OFFICE**

**4.2.1.** Approval of Minutes of the board meeting on November 19, 2024 (Enc. No. 1)

**4.2.2.** Donation Recognition (Enc. No. 2)

**4.2.3.** Monthly Attendance Reports for BOA and SVA (Enc. No. 3)

**5. PUBLIC RECOGNITION/PROCLAMATIONS/ACTION**

**5.1.** Proclamation Honoring the Service & Dedication of Teacher Representative, Cristina Johnson (Enc. No. 4)

Rollin read the proclamation for Johnson's years of service as the Teacher Representative aloud. Rollin presented a framed copy of the proclamation and a plaque to Johnson.

**6. PROGRAM UPDATE & BOARD DEVELOPMENT**

Presentation/Public Hearing/Public Comment/Board Discussion

**6.1. Program Update**

**6.1.1.** There are no Program Update items to include this evening.

**6.2. Board Development**

**6.2.1.** There are no Board Development items to include this evening.

**7. COMMUNITY REPORTS**

Presentation/Public Hearing/Public Comment/Board Discussion

**7.1. Board Member Report**

Blain: Reported BOA parents loved the BOA Middle School music performance and expressed gratitude towards Mrs. McMahon and Mr. Anderson.



Gutierrez: Reported having a nice time at the CSBA Conference with fellow board members. It was a great opportunity to observe how other boards operate. She attended an informational session regarding Charter schools. She is looking forward to the BOA Elementary Music Winter Show.

Tietjen: Reported attending the BOA Middle School Music performance as well as the CSBA conference. Attending the conference made him grateful for the team we have at TACMO.

Monsivais: Nothing to report

Aceves: Reported attending the CSBA Conference and agreed with all aforementioned comments about the conference. She enjoyed seeing so many educators and commented that it helped her understand the hard work of board members and admin teams.

Rollin: Reported attending the CSBA Conference and expressed gratitude to the organization for arranging the trip. He echoed the aforementioned comments regarding the conference and was able to takeaway meaningful information.

## **7.2. Superintendent Report**

### **7.2.1. AB 3216- Phone Free School Act (Enc. No. 5)**

Dr. Ball reported we will be required to develop and approve a board policy that meets the requirements of AB 3216 by July 1, 2025. Our schools do not currently have a formal board policy in place, but do have language for it in the current Family Handbook. The current language limits the use of cell phones and smart watches, but does not ban them. We will need to engage in conversation with board members, teachers, families, and students for this development.

Board and Admin discussion ensued.

### **7.2.2. California School Dashboard (Enc. No. 6)**

Dr. Ball shared the California School Dashboard where the state measures all public schools in California.

## **7.3. Principal Report**

### **7.3.1. 2024 California School Dashboard & CAASPP Data for Blue Oak Academy (Enc. No. 7)**

Soares presented BOA's Dashboard scores. She discussed next steps being improvement strategies including personalized professional development, student goal setting, data driven decision making, and focus on student need.

### **7.3.2. 2024 California School Dashboard & CAASPP Data for Sycamore Valley Academy (Enc. No. 8)**

Morse presented SVA's Dashboard scores. She discussed next steps being strategic adjustments, targeted skills in small group instruction, professional development, collaborative planning, streamlined curriculum, and a focus on goal setting and recognition. Morse commented that the hiring of the Instructional Coach this school year has made a significant impact at SVA, and adding the position of a Behavior Tech Aide will hopefully help drive down student suspensions.

## **7.4. Operations Director Report**

Van Groningen reported on outreach and student recruitment. Admissions season starts on December 16 and will include a strong social media campaign. The leadership team attended the local farmers market and plans to attend again in early February. She commented that attending the CSDC Conference in November went well and it was helpful to connect with Charter information.

## **7.5. Human Resources Director Report**

### **7.5.1. Classified Recruitment Virtual Fair November 21, 2024**

Dolin reported attending the Fall Virtual State-wide Employment Fair with Stacey Nelson, TACMO's Administrative Manager. Together they made an effort to target substitute aides and teachers. They plan to attend another recruitment fair together in February.

## **7.6. Teacher Representative Report**

Janell Geiger introduced herself as SVA's newly appointed Teacher Representative.

Jocelyn Hendershot introduced herself as BOA's newly appointed Teacher Representative.

Rollin welcomed both.

Dr. Ball commented that she was impressed with the level of collaboration in getting voices and participation in the selection process for the Teacher Representatives at both sites.

## **8. ADMINISTRATIVE PANEL RECOMMENDATIONS/ACTIONS**

Review/Public Hearing/Public Input/Board Discussion/ACTION (as applicable)

**8.1.** There are no Administrative Panel items to discuss this evening.

## **9. GENERAL AGENDA**

Review/Public Hearing/Public Input/Board Discussion/ACTION (as applicable)

### **9.1. Monthly Financials Presentation (Enc. No. 9) ACTION**

Meagan Miller of EdTec presented the monthly financials including: 2024-25 forecast summary, 2024-25 current forecast vs. previous forecast, monthly cash balance, accounts payable aging, SVA FY25 enrollment and attendance, BOA FY25 enrollment and attendance, 1st interim report overview, 1st interim report, and the audit 2023-24 recap. Gutierrez moved to approve the Monthly Financials Presentation; Tietjen seconded. Approved 6-0.

### **9.2. 2024-2025 1st Interim Reports for Blue Oak Academy and Sycamore Valley Academy (Enc. No. 10) ACTION**

No further discussion.

Aceves moved to approve 2024-2025 1st Interim Reports for Blue Oak Academy and Sycamore Valley Academy; Gutierrez seconded. Approved 6-0.

**9.3. Audit Reports from CliftonLarsonAllen LLP for 2023-2024 (Enc. No. 11) ACTION**

Dr. Ball reported no findings.

Tietjen moved to approve Audit Reports from CliftonLarsonAllen LLP for 2023-2024;

Monsivais seconded.

Blain questioned what was audited and Dr. Ball clarified.

Approved 6-0.

**9.4. Salary Schedules update for CA Minimum Wage increase effective January 1, 2025 (Enc. No. 12) ACTION**

Dolin reported the increase of minimum wage to \$16.50 as of January 1, 2025. This will change the base salary for hourly staff and salary teachers.

Rollin thanked Dolin for her hard work.

Gutierrez moved to approve Salary Schedules update for CA Minimum Wage increase effective January 1, 2025; Tietjen seconded. Approved 6-0.

**9.5. 2025-2026 Academic Calendar (Enc. No. 13) ACTION**

Dr. Ball presented items 9.5 and 9.6 together. She stated we had a great turn out of staff to provide input to our calendar committee. A few notable changes for the 2025-26 school year will be the start date moving back to a Wednesday, the placement of some professional development days, and Spring conference days changing to minimum days. Discussion regarding school and parent communication ensued.

Monsivais moved to approve item 9.5 2025-2026 Academic Calendar and item 9.6 2025-2026 Calculation of Instructional Minutes; Gutierrez seconded. Approved 6-0

**9.6. 2025-2026 Calculation of Instructional Minutes (Enc. No. 14) ACTION**

Action taken with item 9.5.

**9.7. 2024-25 TACMO TCOE Agency Agreement for New Teacher & Leadership Development for Induction Support (Enc. No. 15) ACTION**

Dr. Ball reported this will be covering the current school year retroactively.

Tietjen moved to approve 024-25 TACMO TCOE Agency Agreement for New Teacher & Leadership Development for Induction Support; Blain seconded. Approved 6-0.

**9.8. 2024-25 TACMO TCOE Agency Agreement for New Teacher & Leadership Development for Intern Support (Enc. No. 16) ACTION**

Dr. Ball reported this is the same type of agreement as 9.7 except it's for interns.

Blain moved to approve 2024-25 TACMO TCOE Agency Agreement for New Teacher & Leadership Development for Intern Support; Gutierrez seconded. Approved 6-0.

**10. ADJOURNMENT**

**10.1. Request for future Board Agenda items**

**10.2. The next The Academies CMO board meeting: January 21, 2025 at 6:30 PM.**

Rollin adjourned the meeting at 8:57 PM.

**Combined Board Check Register**



**School:** TACMO

**Month:** November 2024

					<b>Total Paid By Check:</b>	\$ 191,832.17
					<b>Total Paid By Credit Card:</b>	\$ 5,657.54

Payment Type	Check #/CC Account	Vendor	Transaction Date	Description	Void	Amount
Check	8685	ODP Business Solutions, LLC	11/5/2024	-- Bill #387602004001--Supplies Bill #391327600001--Supplies Bill #387482524001--Supplies Bill #388695089001--Supplies Bill #389383871001--Supplies -- --		\$ 713.84
Check	8686	Sweetwater	11/5/2024	Bill #42797002--Eurolive Speaker/MP3 Player		\$ 354.92
Check	8687	Boardable	11/5/2024	Bill #25655--Additional Professional Yearly Individual		\$ 5,276.40
Check	8688	The Cranium Company	11/5/2024	Bill #1235--Science Event for 3rd Grade		\$ 845.00
Check	8689	J&D Lighting & Alarm	11/5/2024	Bill #378673--Intrusion Monitoring; 11/01/24 - 01/31/25		\$ 125.52
Check	8690	Rockalingua	11/5/2024	Bill #2590--1 Year Teacher Pro Subscrption ( 1 License for 1 Teacher and Students)		\$ 199.00
Check	8691	Heinemann	11/5/2024	Bill #956194631--Materials & Supplies		\$ 37.50
Check	8692	CMEA Central Section	11/5/2024	Bill #35940-23885-3317--Class 1- Middle School Intermediate		\$ 225.00
Check	8693	Amazon Capital Services	11/5/2024	Bill #1WF4-JDCM-HCY3--Supplies Bill #1C4H-M1VG-QQGY--Supplies Bill #1P6W-WCPD-FFQN--Supplies		\$ 179.17
Check	8694	Tulare County Superintendent of Schools	11/5/2024	Bill #250723--Acctvnet Anual Maintance Fee; 2024-2025 Bill #250721--Acctvnet Anual Maintance Fee; 2024-2025		\$ 4,800.00
Check	8695	New Management, Inc.	11/5/2024	Bill #7591--Lock Blok		\$ 36.64
Check	8696	William V. Macgill & Co.	11/5/2024	Bill #IN0868632--Sure Temp Probe Covers 1000 per case		\$ 66.10
Check	8697	Waste Management/USA Waste	11/5/2024	Bill #4843214-0165-1--Waste Svc: November 2024		\$ 779.55
Check	8698	Seth Herrera	11/5/2024	Bill #101524--Reimb: Fingerprinting Live scan		\$ 74.54
Check	8699	Self-Insured Schools of California	11/5/2024	Bill #November 2024--Billing Period: November 2024		\$ 75,207.30

Note: Multiple expenses or "Itemized/Invoice Amounts" may be paid by one check. The total "Check Amount" will appear for each "Itemized/Invoice Amount" paid by the check.

Payment Type	Check #/CC Account	Vendor	Transaction Date	Description	Void	Amount
Check	8700	California County Superintendents	11/14/2024	Bill #0514-0816-0832--CISC Full Conference Attendance Registration		\$ 500.00
Check	8701	Staci Soares	11/14/2024	Bill #102824--Reimb: Art Supplies		\$ 79.36
Check	8702	Generation Genius, Inc.	11/14/2024	Bill #GG228395-R2--School Plan (Science & Math)		\$ 1,795.00
Check	8703	Stacey Nelson	11/14/2024	Bill #110124--Reimb: Mileage		\$ 365.02
Check	8704	J.W.Pepper & Son, Inc.	11/14/2024	Bill #366900805--Art & Music Supplies		\$ 50.00
Check	8705	American Fidelity Assurance	11/14/2024	Bill #2507826B--09/30/25 Flex Plan Liability Coverage		\$ 504.52
Check	8706	Stage Accents	11/14/2024	Bill #464055--Art & Music Supplies		\$ 89.38
Check	8707	Krystal Eastman	11/14/2024	Bill #100124--Reimb: Mileage		\$ 101.64
Check	8708	Amazon Capital Services	11/14/2024	Bill #1HDC-P6PP-CKHG--Supplies Bill #1137-H733-CHD6--Supplies Bill #1YM4-JX77-XNLT--Supplies Bill #14TX-3PXQ-V4TN--Supplies Bill #1YLF-1MCG-373T--Supplies Bill #1JFW-NTCR-7JCG--Supplies Bill #1YM4-JX77-QV33--Supplies Bill #19XG-GFWC-1G7Q--Supplies Bill #1WTY-LR43-FFXM--Supplies Bill #17GM-MKFG-XMDQ--Supplies Bill #13PK-XLKD-Y6GK--Supplies Bill #1GCY-R747-6FGT--Supplies Bill #1YXH-G3GD-JQPX--Supplies Bill #14FY-1YF4-MDDK--Supplies Bill #1C7X-VNNX-6GKD--Supplies Bill #1K36-1K1Q-GRND--Supplies		\$ 1,556.08
Check	8709	Pevo Sports Co	11/14/2024	Bill #5053--PEVO Park Series Soccer Goal		\$ 4,420.00
Check	8710	ODP Business Solutions, LLC	11/14/2024	Bill #391234148001--Supplies -- -- -- Bill #390096779001--Supplies Bill #389592785001--Supplies Bill #390418435001--Supplies Bill #391824087001--Supplies Bill #391234149001--Supplies Bill #390651196001--Supplies Bill #391234009001--Supplies		\$ 1,085.43
Check	8711	EdTec	11/14/2024	Bill #204688--Monthly PowerSchool		\$ 16,230.00

Note: Multiple expenses or "Itemized/Invoice Amounts" may be paid by one check. The total "Check Amount" will appear for each "Itemized/Invoice Amount" paid by the check.

Payment Type	Check #/CC Account	Vendor	Transaction Date	Description	Void	Amount
Check	8712	Cline's Business Equipment, Inc.	11/14/2024	Bill #248675--Contract Usage charge: 09/22 - 10/21/24 Bill #248602--Contract Usage charge: 09/12 - 10/11/24 & Standard min Charge Bill #248752--Contract Usage charge: 10/01 - 10/31/24		\$ 3,265.50
Check	8713	Miller Brothers Screenprinting	11/14/2024	Bill #21-360--T-shirts & Printing		\$ 3,152.08
Check	8714	Visalia Unified School District	11/14/2024	Bill #2927--Transportation Charges: September 2024 Bill #2928--Transportation Charges: October 2024		\$ 17,871.00
Check	8715	Idea Printing & Graphics Inc.	11/14/2024	Bill #124976--Full Color Large Check (Laminated for Multi Uses) 2 x 4 Bill #124915--Color/Color 16PT UV Coating only on Front		\$ 333.10
Check	8716	Sign Time	11/14/2024	Bill #90106--Cross Base for Feather Flag		\$ 276.68
Check	8717	American Fidelity Assurance	11/14/2024	Bill #D776242--10/01 - 10/31/24 Flex Plan Liability Coverage		\$ 5,908.90
Check	8718	Riverside Insights	11/14/2024	Bill #INV224585--Cognitive Abilities Test		\$ 2,191.90
Check	8719	Gabriel James Rodriguez	11/14/2024	Bill #102524--Reimb: Class decor/Supplies & Materials		\$ 651.94
Check	8720	Shauna Dolin	11/14/2024	Bill #103124--Reimb: Mileage		\$ 21.24
Check	8721	Tulare County Superintendent of Schools	11/14/2024	Bill #251180--Registration fee for Sycamore Valley Academy students to attend expanding your Horizons: 10/26/24		\$ 460.00
Check	8722	Law Offices of Young, Minney & Corr, LLP	11/14/2024	Bill #13315--Legal Svcs thru: 10/12 - 10/26/24		\$ 9,017.50
Check	8723	Cousin's Concert Attire	11/14/2024	Bill #692980--Materials & Supplies		\$ 432.00
Check	8724	PresenceLearning, Inc.	11/14/2024	Bill #INV75342--SLP Svcs: Weekly Dedicated OT & SLP Hours		\$ 19,981.85
Check	8725	Lauren Ventura	11/14/2024	Bill #110424--Reimb: Mileage		\$ 129.24
Check	8726	Foundation for Educational Administration	11/14/2024	Bill #160278--ACSA - Payroll Period: 11/01 - 11/30/24		\$ 737.29
Check	8727	Investors Property Management	11/25/2024	Bill #December 2024--TACMO Home Office Monthly Rent		\$ 900.00
Check	DB110524	Employers Insurance	11/5/2024	DB110524 - Employers Insurance		\$ 4,359.00
Check	DB110524-1	Samantha Bowman	11/5/2024	DB110524-1 - Bowman, Samantha		\$ 50.00
Check	DB110624	SoCalGas	11/6/2024	DB110624 - SoCalGas		\$ 14.94
Check	DB111224	Southern California Edison	11/12/2024	DB111224 - Southern California Edison		\$ 23.44
Check	DB111324	Samantha Bowman	11/13/2024	DB111324 - Bowman, Samantha		\$ 50.00

Note: Multiple expenses or "Itemized/Invoice Amounts" may be paid by one check. The total "Check Amount" will appear for each "Itemized/Invoice Amount" paid by the check.

Payment Type	Check #/CC Account	Vendor	Transaction Date	Description	Void	Amount
Check	DB111324-1	LEAF	11/13/2024	DB111324-1 - LEAF Capital Funding, LLC (Contract 100-6755091-002)		\$ 388.48
Check	DB111824	Cardmember Service	11/18/2024	DB111824 - Community West Bank Visa 8054		\$ 5,657.54
Check	DB112024	Samantha Bowman	11/20/2024	DB112024 - Bowman, Samantha		\$ 50.00
Check	DB112024-1	LEAF Capital Funding, LLC	11/20/2024	DB112024-1 - LEAF Capital Funding, LLC (Contract #100-4730169-003)		\$ 211.64
Credit Card	9515-8054	Tracfone *Services	11/14/2024	10/21 - Tracfone *Services - TACMO home office monthly cell phone		\$ 16.61
Credit Card	9515-8054	Comcast California	11/14/2024	10/24 - Comcast California - TACMO home office monthly wireless/phone		\$ 194.69
Credit Card	9515-8054	Señor Wooly	11/14/2024	11/04 - Señor Wooly - Spanish Curriculum		\$ 25.00
Credit Card	9515-8054	LifeVac LLC	11/14/2024	11/06 - LifeVac LLC - Medical Supplies		\$ 546.44
Credit Card	9515-8054	Canva	11/14/2024	10/24 - Canva - Fliers for recruitment		\$ 150.00
Credit Card	9515-8054	Constant Contact, Inc.	11/14/2024	11/07 - Constant Contact, Inc. - Monthly renewal fee for email subscription		\$ 58.00
Credit Card	9515-8054	West Coast Sourdough	11/14/2024	10/31 - West Coast Sourdough - Working Lunch		\$ 57.65
Credit Card	9515-8054	Hilton Hotels	11/14/2024	11/04 - Hilton Hotels - Advance Deposit for CISC 2025 Conference		\$ 281.33
Credit Card	9515-8054	California County Superintendents	11/14/2024	11/04 - California County Superintendents - CISC 2025 Conference Fee		\$ 515.00
Credit Card	9515-8054	Hampton Inn Riverside	11/14/2024	10/21 - Hampton Inn Riverside		\$ 661.11
Credit Card	9515-8054	USPS PO	11/14/2024	10/28 - USPS PO - Postage fee for mailing of document		\$ 5.86
Credit Card	9515-8054	GrubHub.com	11/14/2024	10/25 - GrubHub.com - Strategic Planning Meeting		\$ 195.00
Credit Card	9515-8054	Derrel's Mini Storage	11/14/2024	10/24 - Derrel's Mini Storage - Annual payment for TACMO storage unit		\$ 1,035.24
Credit Card	9515-8054	The Webstaurant Store	11/14/2024	10/23 - The Webstaurant Store - Janitorial Supplies		\$ 947.70
Credit Card	9515-8054	Left of Center Visalia	11/14/2024	10/22 - Left of Center Visalia - Lunch meeting with Board Chair and Vice Chair		\$ 47.06
Credit Card	9515-8054	LEGO Enfield	11/14/2024	10/21 - LEGO Enfield - Lego Club		\$ 694.29
Credit Card	9515-8054	GrubHub.com	11/14/2024	10/21 - GrubHub.com - Lunch meeting with Principal		\$ 49.95
Credit Card	9515-8054	Ventris Learning	11/14/2024	10/22 - Ventris Learning - Curriculum		\$ 160.00
Credit Card	9515-8054	Tracfone *Services	11/14/2024	10/22 - Tracfone *Services - ASP monthly cell phone		\$ 16.61

**Combined Board Check Register**



School: TACMO

Month: December 2024

Total Paid By Check: \$ 184,513.64  
 Total Paid By Credit Card: \$ 16,269.20

Payment Type	Check #/CC Account	Vendor	Transaction Date	Description	Void	Amount
Check	8728	EdTec	12/2/2024	Bill #205775--UPS Postage		\$ 23.52
Check	8729	ODP Business Solutions, LLC	12/2/2024	Bill #392344582001--Supplies Bill #392311889001--Supplies Bill #395187235001--Supplies Bill #388198271001--Supplies Bill #390535120001--Supplies Bill #393365291001--Supplies Bill #395187237001--Supplies Bill #392537718001--Supplies Bill #390894928001--Supplies Bill #395186879001--Supplies Bill #390895345001--Supplies Bill #390895346001--Supplies Bill #391234149002--Supplies		\$ 987.93
Check	8730	Cline's Business Equipment, Inc.	12/2/2024	Bill #250228--Standard min Charge Bill #250229--Contract Usage charge: 10/12 - 11/11/24 & Standard min Charge Bill #250240--Contract Usage charge: 10/22 - 11/21/24 Bill #249642--Contract Usage charge: 10/01 - 10/31/24 Bill #249659--Contract Usage charge: 10/13 - 11/12/24 Bill #249658--Contract Usage charge: 10/13 - 11/12/24 Bill #245592--Contract Usage charge: 09/06/24 Bill #250004--Contract Usage charge: 11/15/24		\$ 2,391.31

Note: Multiple expenses or "Itemized/Invoice Amounts" may be paid by one check. The total "Check Amount" will appear for each "Itemized/Invoice Amount" paid by the check.



Payment Type	Check #/CC Account	Vendor	Transaction Date	Description	Void	Amount
Check	8731	Amazon Capital Services	12/2/2024	Bill #1XQY-RKFL-GR9K--Supplies Bill #16LN-44DG-PM1Y--Supplies Bill #1RVT-P1GT-463J--Supplies Bill #1743-NCLY-96XM--Supplies Bill #17XH-7GFV-6QN4--Supplies Bill #1KVF-3VVQ-GXHN--Supplies Bill #11LN-MDG9-71GQ--Supplies Bill #1VC3-VDG7-4Y7C--Supplies		\$ 530.62
Check	8732	Stage Accents	12/2/2024	Bill #464759--Art & Music Supplies Bill #465172--Art & Music Supplies Bill #464744--Art & Music Supplies		\$ 993.42
Check	8733	Jones School Supply Co., Inc	12/2/2024	Bill #2123127--Blue Event Card		\$ 314.46
Check	8734	Lupita Sanchez	12/2/2024	Bill #24102801--Programming Hours		\$ 3,870.00
Check	8735	Miller Brothers Screenprinting	12/2/2024	Bill #21-365--T-shirts & Printing		\$ 3,498.23
Check	8736	Devon Enos	12/2/2024	Bill #111424--Reimb; BOA 2/3 Field Trip		\$ 87.00
Check	8737	Lauren Ventura	12/2/2024	Bill #111324--Reimb: Enrichment Bill #111524--Reimb: Enrichment Bill #103024--Reimb: Enrichment		\$ 67.09
Check	8738	TCG Administrators, a HUB International Company	12/2/2024	Bill #181989--Monthly Administration Fees		\$ 28.00
Check	8739	Visalia Unified School District	12/2/2024	Bill #2960--Transportation Charges: October 2024		\$ 208.80
Check	8740	American Fidelity Assurance	12/2/2024	Bill #D786752--11/01 - 11/30/24 Flex Plan Liability Coverage		\$ 5,956.68
Check	8741	Shauna Dolin	12/2/2024	Bill #112124--Reimb: Mileage		\$ 29.28
Check	8742	Claudia Van Groningen	12/2/2024	Bill #112024--Reimb: CSDC Conference Lodging and Parking Meal & Mileage		\$ 1,114.70
Check	8743	Staci Soares	12/2/2024	Bill #111224--Reimb; Sub Plants & Street Sign for Learning Center		\$ 70.66
Check	8744	Stacey Nelson	12/2/2024	Bill #112224--Reimb: Mileage		\$ 91.92
Check	8745	Tropical Lawn Services, Inc	12/2/2024	Bill #588987--Parking Lot-Entry Planter; Demo Steel Edging & Plants		\$ 11,423.00
Check	8746	Arturo Villasenor	12/2/2024	Bill #111524--Reimb: Soccer Goale Gloves & claypaint Markers		\$ 148.13
Check	8747	Krystal Eastman	12/2/2024	Bill #111224--Reimb: Mileage		\$ 75.78
Check	8748	David Britter	12/2/2024	Bill #081924--Reimb: Mouse Traps and Tape for Enginerring Effective Mon		\$ 44.15
Check	8749	American Fidelity Assurance	12/2/2024	Bill #2507828--09/30/25 Flex Plan Liability Coverage		\$ 504.52

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Payment Type	Check #/CC Account	Vendor	Transaction Date	Description	Void	Amount
Check	8750	E&M's Reptile Family, LLC	12/2/2024	Bill #Reservation 1212--12/6/24 School Visit for Live Performance		\$ 820.00
Check	8751	Self-Insured Schools of California	12/6/2024	Journal #SVAC6931-- Bill #December 2024--Billing Period: December 2024	Voided	\$ -
Check	8752	Foundation for Educational Administration	12/6/2024	Bill #160278BAL--ACSA - Payroll Period: 11/01 - 11/30/24 (Balance due)		\$ 60.00
Check	8753	Self-Insured Schools of California	12/6/2024	Bill #December 2024--Billing Period: December 2024		\$ 72,913.05
Check	8754	Valley Life Foundation	12/6/2024	Bill #120624--"Donation" fee		\$ 300.00
Check	8755	EdTec	12/10/2024	Bill #204689--Monthly PowerSchool		\$ 16,230.00
Check	8756	The McLennan Group, LLC	12/10/2024	Bill #1052--Preparing LCAP Plan Documents In DTS		\$ 1,073.25
Check	8757	ODP Business Solutions, LLC	12/10/2024	Bill #394624015001--Supplies Bill #395699960001--Supplies Bill #394623189001--Supplies Bill #394628241001--Supplies Bill #395108507001--Supplies		\$ 767.27
Check	8758	Cline's Business Equipment, Inc.	12/10/2024	Bill #250701--Contract Usage charge: 11/01 - 11/30/24 Bill #250626--Contract Usage charge: 11/01 - 11/30/24 Bill #250484--IT Service: 11/15/24		\$ 1,648.59
Check	8759	Waste Management/USA Waste	12/10/2024	Bill #4847662-0165-7--Waste Svc: December 2024		\$ 760.54
Check	8760	William V. Macgill & Co.	12/10/2024	Bill #IN0887339--4'X5 YDS Elastic bandage with self Course		\$ 86.88
Check	8761	Tulare County Superintendent of Schools	12/10/2024	Bill #251300--Prepare Workshop 2 Mental Health Crisis Bill #251330--California Collaborative for learning Acceleration: 11/14/24 Bill #251342--California Collaborative for learning Acceleration: 11/07/24 Bill #251272--Safe Health Practices Workshop Registration		\$ 930.00
Check	8762	Lauren Ventura	12/10/2024	Bill #120224--Reimb: ASP Supplies Bill #120324--Reimb: CMO - SVA CMO - BOA & CMO - Michaels		\$ 188.60
Check	8763	Pacific Employers	12/10/2024	Bill #16823--Quarterly Membership Dues for HR Services - Quarterly Billing		\$ 297.00
Check	8764	Riverside Insights	12/10/2024	Bill #INV227801--Cognitive Abilities Test		\$ 55.65
Check	8765	REV Robotics LLC	12/10/2024	Bill #179905--Services		\$ 1,568.39

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Payment Type	Check #/CC Account	Vendor	Transaction Date	Description	Void	Amount
Check	8766	ODP Business Solutions, LLC	12/19/2024	Bill #397852206001--Supplies Bill #397852007001--Supplies Bill #397854481001--Supplies Bill #397852203001--Supplies Bill #396702352001--Supplies		\$ 370.37
Check	8767	Amazon Capital Services	12/19/2024	Bill #1K39-7KXX-TYCK--Supplies Bill #1VPQ-DDMD-WLDT--Supplies Bill #1TM1-WGDQ-H1YR--Supplies Bill #1WJL-FLH7-WL7T--Supplies		\$ 498.38
Check	8768	Cline's Business Equipment, Inc.	12/19/2024	Bill #251159--Konica Minolta: 12/09/24 Bill #251202--IT Service: 12/03/24 Bill #251157--Konica Minolta: 12/09/24 Bill #251160--Konica Minolta: 12/09/24		\$ 330.12
Check	8769	Visalia Unified School District	12/19/2024	Bill #3015--Transportation Charges due by 01/04/25 Bill #2994--Transportation Charges: November 2024		\$ 9,132.65
Check	8770	Law Offices of Young, Minney & Corr, LLP	12/19/2024	Bill #13792--Legal Svcs thru: 11/01 - 11/26/24		\$ 3,920.00
Check	8771	Sequoia Riverlands Trust	12/19/2024	Bill #135109--Field Trip: Kaweah Oaks Preserve - 03/14/25		\$ 602.29
Check	8772	Foundation for Educational Administration	12/19/2024	Bill #161361--ACSA - Payroll Period: 12/01 - 12/31/24		\$ 797.29
Check	8773	Stacey Nelson	12/19/2024	Bill #121124--Reimb: Frame for Proclamation at Board Meeting Breakfast & Lunch during CSBA Conference & Mileage		\$ 427.00
Check	8774	Visalia Unified School District	12/19/2024	Bill #3031--Transportation Charges Due by 01/05/25 Bill #3014--Transportation Charges Due by 01/04/25		\$ 1,195.33
Check	8775	PresenceLearning, Inc.	12/19/2024	Bill #INV75879--SLP Svcs: Weekly Dedicated OT & SLP Hours		\$ 14,704.13
Check	8776	Swank Movie Licensing USA	12/19/2024	Bill #3793356--Public Performance Site License Covering: 11/18/24 - 11/17/25		\$ 578.00
Check	8777	Lauren Ventura	12/19/2024	Bill #120624--Reimb: Enrichment Supplies Bill #121124--Reimb: Enrichment Bill #120624A--Reimb: Enrichment Supplies		\$ 80.44
Check	8778	Investors Property Management	12/19/2024	Bill #January 2025--TACMO Home Office Monthly Rent		\$ 900.00
Check	DB120324	Employers Insurance	12/3/2024	DB120324 - Employers Insurance		\$ 4,359.00
Check	DB120324-1	Samantha Bowman	12/3/2024	DB120324-1 - Bowman, Samantha		\$ 50.00
Check	DB120924	Southern California Edison	12/9/2024	DB120924 - Southern California Edison		\$ 105.78
Check	DB121024	Samantha Bowman	12/10/2024	DB121024 - Bowman, Samantha		\$ 50.00
Check	DB121024-1	SoCalGas	12/10/2024	DB121024-1 - SoCalGas		\$ 51.16
Check	DB121324	LEAF	12/13/2024	DB121324 - LEAF Capital Funding, LLC (Contract 100-6755091-002)		\$ 388.48

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Payment Type	Check #/CC Account	Vendor	Transaction Date	Description	Void	Amount
Check	DB121724	Samantha Bowman	12/17/2024	DB121724 - Bowman, Samantha		\$ 50.00
Check	DB121724-1	Cardmember Service	12/17/2024	DB121724-1 - Community West Bank Visa 8054		\$ 15,503.16
Check	DB122024	LEAF Capital Funding, LLC	12/20/2024	DB122024 - LEAF Capital Funding, LLC (Contract #100-4730169-003)		\$ 211.64
Check	DB122424	Samantha Bowman	12/24/2024	DB122424 - Bowman, Samantha		\$ 50.00
Credit Card	9515-8054	Jimmy Johns	12/13/2024	11/27 - Jimmy Johns - Lunch for students during Enrichment Camp		\$ 119.99
Credit Card	9515-8054	Hilton Hotels	12/13/2024	11/19 - Hilton Hotels - Hotel for ACSA Leadership Conference		\$ 674.41
Credit Card	9515-8054	Amazon Mktp us	12/13/2024	11/25 - Amazon Mktp us - Award plaque for C.Johnson proclamation		\$ 43.35
Credit Card	9515-8054	DoubleTree by Hilton	12/13/2024	11/27 - DoubleTree by Hilton - Lodging for CSBA Conference		\$ 1,011.46
Credit Card	9515-8054	DoubleTree by Hilton	12/13/2024	11/27 - DoubleTree by Hilton - Lodging for CSBA Conference		\$ 1,011.46
Credit Card	9515-8054	DoubleTree by Hilton	12/13/2024	11/27 - DoubleTree by Hilton - Lodging for CSBA Conference		\$ 1,011.46
Credit Card	9515-8054	DoubleTree by Hilton	12/13/2024	11/27 - DoubleTree by Hilton - Lodging for CSBA Conference		\$ 1,011.46
Credit Card	9515-8054	DoubleTree by Hilton	12/13/2024	11/27 - DoubleTree by Hilton - Lodging for CSBA Conference		\$ 1,011.46
Credit Card	9515-8054	DoubleTree by Hilton	12/13/2024	11/27 - DoubleTree by Hilton - Lodging for CSBA Conference		\$ 1,011.46
Credit Card	9515-8054	Alaska Airlines	12/13/2024	12/02 - Alaska Airlines - Charge 1 of 2 on same receipt: Flight for National Superintendents Forum		\$ 258.10
Credit Card	9515-8054	Alaska Airlines	12/13/2024	12/02 - Alaska Airlines - Charge 2 of 2 on same receipt: Flight for National Superintendent Forum		\$ 9.00
Credit Card	9515-8054	Wendy's	12/13/2024	12/05 - Wendy's - Meal during travel		\$ 12.30
Credit Card	9515-8054	Uber Trip	12/13/2024	12/06 - Uber Trip - Ride for group to meal during CSBA Conference		\$ 10.70
Credit Card	9515-8054	Anaheim Burger Co	12/13/2024	12/06 - Anaheim Burger Co - Receipt lost - coffee during CSBA conference		\$ 5.30
Credit Card	9515-8054	Uber Trip	12/13/2024	12/06 - Uber Trip - Ride for group to meal during CSBA Conference		\$ 15.94
Credit Card	9515-8054	Uber Trip	12/13/2024	12/06 - Uber Trip - Ride for group to meal during CSBA Conference		\$ 10.92
Credit Card	9515-8054	Uber Trip	12/13/2024	12/06 - Uber Trip - Ride for group to meal during CSBA Conference		\$ 16.98
Credit Card	9515-8054	Rock & Brews	12/13/2024	12/09 - Rock & Brews - Meal for group during CSBA conference		\$ 185.07

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Payment Type	Check #/CC Account	Vendor	Transaction Date	Description	Void	Amount
Credit Card	9515-8054	TacoMiendo Mexican Grill	12/13/2024	12/09 - TacoMiendo Mexican Grill - Meal for group during CSBA conference		\$ 55.01
Credit Card	9515-8054	Fire+ice - Anaheim	12/13/2024	12/09 - Fire+ice - Anaheim - Meal for group during CSBA conference		\$ 158.94
Credit Card	9515-8054	Uber Trip	12/13/2024	12/09 - Uber Trip - Ride for group to meal during CSBA Conference		\$ 28.32
Credit Card	9515-8054	Uber Trip	12/13/2024	12/09 - Uber Trip - Ride for group to meal during CSBA Conference		\$ 28.66
Credit Card	9515-8054	Uber Trip	12/13/2024	12/09 - Uber Trip - Ride for group to meal during CSBA Conference		\$ 14.21
Credit Card	9515-8054	The Black Marlin	12/13/2024	12/09 - The Black Marlin - Meal for group during CSBA conference		\$ 391.30
Credit Card	9515-8054	The Coffee Bean & Tea	12/13/2024	12/09 - The Coffee Bean & Tea - Coffee during travel for conference		\$ 7.09
Credit Card	9515-8054	Uber Trip	12/13/2024	12/09 - Uber Trip - Ride for group to meal during CSBA Conference		\$ 29.94
Credit Card	9515-8054	Uber Trip	12/13/2024	12/09 - Uber Trip - Ride for group to meal during CSBA Conference		\$ 40.30
Credit Card	9515-8054	Uber Trip	12/13/2024	12/09 - Uber Trip - Ride for group to meal during CSBA Conference		\$ 28.30
Credit Card	9515-8054	DoubleTree by Hilton	12/13/2024	12/09 - DoubleTree by Hilton - Coffee during travel for conference		\$ 7.44
Credit Card	9515-8054	Uber Trip	12/13/2024	12/09 - Uber Trip - Ride for group to meal during CSBA Conference		\$ 8.95
Credit Card	9515-8054	Uber Trip	12/13/2024	12/09 - Uber Trip - Ride to airport for conference travel		\$ 50.59
Credit Card	9515-8054	DoubleTree by Hilton	12/13/2024	12/09 - DoubleTree by Hilton - Breakfast during CSBA conference		\$ 22.95
Credit Card	9515-8054	DoubleTree by Hilton	12/13/2024	12/09 - DoubleTree by Hilton - Parking & Fees during CSBA conference		\$ 101.79
Credit Card	9515-8054	DoubleTree by Hilton	12/13/2024	12/09 - DoubleTree by Hilton - Coffee during travel for conference		\$ 9.81
Credit Card	9515-8054	Uber Trip	12/13/2024	12/10 - Uber Trip - Ride during conference in SF		\$ 9.59
Credit Card	9515-8054	Amtrak.com	12/13/2024	12/10 - Amtrak.com - Train fee for travel home from conference		\$ 42.00
Credit Card	9515-8054	Hilton Herb N' Kitchen	12/13/2024	12/10 - Hilton Herb N' Kitchen - Receipt lost - sandwich & water during conference		\$ 25.26
Credit Card	9515-8054	Hilton San Francisco	12/13/2024	12/10 - Hilton San Francisco - Room fees during SF conference		\$ 204.92
Credit Card	9515-8054	GrubHub.com	12/13/2024	12/12 - GrubHub.com - Food for December board meeting		\$ 265.66

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Payment Type	Check #/CC Account	Vendor	Transaction Date	Description	Void	Amount
Credit Card	9515-8054	SP Bodno.COM	12/13/2024	11/15 - SP Bodno.COM - Staff ID printer subscription renewal		\$ 289.99
Credit Card	9515-8054	USPS PO	12/13/2024	11/18 - USPS PO - PO Box annual renewal		\$ 364.00
Credit Card	9515-8054	Tracfone *Services	12/13/2024	11/19 - Tracfone *Services - CMO cell phone monthly bill		\$ 16.61
Credit Card	9515-8054	Amazon Mktp us	12/13/2024	11/20 - Amazon Mktp us - Ribbon for Staff ID printer		\$ 81.16
Credit Card	9515-8054	Heidi Songs	12/13/2024	11/21 - Heidi Songs - 12 month rental of "sight words" songs for Kindergarten		\$ 59.99
Credit Card	9515-8054	Tracfone *Services	12/13/2024	11/21 - Tracfone *Services - ASP cell phone monthly bill		\$ 16.61
Credit Card	9515-8054	Round Table Pizza	12/13/2024	11/25 - Round Table Pizza - CMO office lunch meeting		\$ 46.21
Credit Card	9515-8054	Comcast California	12/13/2024	11/25 - Comcast California - CMO office monthly phone/internet bill		\$ 194.77
Credit Card	9515-8054	Amazon Mktp us	12/13/2024	12/04 - Amazon Mktp us - Ribbon for Staff ID printer		\$ 40.58
Credit Card	9515-8054	United-states-flag.com	12/13/2024	12/06 - United-states-flag.com - Flags for classrooms		\$ 245.63
Credit Card	9515-8054	Site Coordinator	12/13/2024	12/10 - Site Coordinator - 2025 Site Coordinator Symposium		\$ 92.55
Credit Card	9515-8054	Amazon Mktp us	12/13/2024	12/12 - Amazon Mktp us - TACMO bracelets for staff		\$ 16.90
Credit Card	9515-8054	Amazon Mktp us	12/13/2024	12/12 - Amazon Mktp us - TACMO bracelets for staff		\$ 7.58
Credit Card	9515-8054	PESI, Inc.	12/13/2024	12/13 - PESI, Inc. - Live Webinar Access		\$ 249.99
Credit Card	9515-8054	UO Conference Services	12/13/2024	11/18 - UO Conference Services - 2024 CSDC Conference registration		\$ 799.00
Credit Card	9515-8054	Apple.com	12/13/2024	11/18 - Apple.com - JAMF Pro for computer		\$ 135.00
Credit Card	9515-8054	Scorpio Coffee	12/13/2024	11/20 - Scorpio Coffee - Food during CSDC Conference		\$ 17.82
Credit Card	9515-8054	Urban Roots Brewery & Smokehouse	12/13/2024	11/20 - Urban Roots Brewery & Smokehouse - Food during CSDC Conference		\$ 21.04
Credit Card	9515-8054	Little Caesars	12/13/2024	11/22 - Little Caesars - Lunch for students during Conference Care		\$ 92.56
Credit Card	9515-8054	Little Caesars	12/13/2024	11/22 - Little Caesars - Lunch for students during Conference Care		\$ 103.75
Credit Card	9515-8054	Apple.com	12/13/2024	11/22 - Apple.com - Equipment for computer		\$ 59.62
Credit Card	9515-8054	Costco Whse	12/13/2024	11/25 - Costco Whse - Snacks for students during Enrichment Camp		\$ 29.90
Credit Card	9515-8054	Target	12/13/2024	11/25 - Target - Snacks for students during Enrichment Camp		\$ 105.30

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*Thank you so much for your donation!*

Gifts like yours help us further our mission and ensure the vitality of this exciting educational option in our community. On behalf of the entire team of founders, The Academies Board of Directors, and our students, who are the beneficiaries of your generosity, we extend our warm thanks for your support.

DONOR'S NAME: Cristina Johnson

AMOUNT DONATED: \$20.00

No goods or services were provided in return for this gift.

Received by *Donya Ball* January 2, 2025  
Dr. Donya Ball, Superintendent

The Academies Charter Management Organization Tax ID #: 37-1638700

The mission of our schools is to provide a rich, meaningful education in a nurturing environment, where students are continually challenged and their natural curiosity, creativity, and talents can thrive. Our school is a collaborative community of educators and families working together to help our students grow into virtuous, courageous, and intelligent citizens, equipped with a love of learning and a love of life, and eager to contribute to a better world.

The Academies charter schools model transformative change in education by elevating expectations of learning and growth. With grit, tenacity, and empathy, we improve the world around us by embracing challenges as problem-solvers. We create an inclusive community with access to rigorous and enriching educational experiences that challenge and support individuals to achieve their personal best and realize new opportunities.





*Thank you so much for your donation!*

Gifts like yours help us further our mission and ensure the vitality of this exciting educational option in our community. On behalf of the entire team of founders, The Academies Board of Directors, and our students, who are the beneficiaries of your generosity, we extend our warm thanks for your support.

DONOR'S NAME: Sizzler USA Corp

AMOUNT DONATED: \$1093.32

No goods or services were provided in return for this gift.

Received by *Donya Ball* December 19, 2024  
Dr. Donya Ball, Superintendent

The Academies Charter Management Organization Tax ID #: 37-1638700

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# Attendance Summary By Grade

**Blue Oak Academy**  
12/02/2024 to 12/27/2024 = 15 school days

Grade Level	Carry Fwd	Gain	Mult Gain	Loss	Ending	Actual Days	OffTrack	Days N/E	Days Absent	Days Attd	ADA	ADA %
-1	40	0	0	0	40	600	0	0	41.00	559.00	37.27	93.17%
0	54	0	0	0	54	810	0	0	53.00	757.00	50.47	93.46%
<b>Subtotal</b>	<b>94</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>94</b>	<b>1410</b>	<b>0</b>	<b>0</b>	<b>94.00</b>	<b>1316.00</b>	<b>87.74</b>	<b>93.33%</b>
1	42	0	0	0	42	630	0	0	35.00	595.00	39.67	94.44%
2	46	0	0	0	46	690	0	0	44.00	646.00	43.07	93.62%
3	41	0	0	0	41	615	0	0	60.00	555.00	37.00	90.24%
<b>Subtotal</b>	<b>129</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>129</b>	<b>1935</b>	<b>0</b>	<b>0</b>	<b>139.00</b>	<b>1796.00</b>	<b>119.74</b>	<b>92.82%</b>
4	44	0	0	0	44	660	0	0	54.00	606.00	40.40	91.82%
5	43	0	0	1	42	645	0	5	44.00	596.00	39.73	93.13%
6	41	0	0	0	41	615	0	0	11.00	604.00	40.27	98.21%
<b>Subtotal</b>	<b>128</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>127</b>	<b>1920</b>	<b>0</b>	<b>5</b>	<b>109.00</b>	<b>1806.00</b>	<b>120.40</b>	<b>94.31%</b>
7	49	0	0	1	48	735	0	5	4.00	726.00	48.40	99.45%
8	31	0	0	0	31	465	0	0	12.00	453.00	30.20	97.42%
<b>Subtotal</b>	<b>80</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>79</b>	<b>1200</b>	<b>0</b>	<b>5</b>	<b>16.00</b>	<b>1179.00</b>	<b>78.60</b>	<b>98.66%</b>
<b>Grand Total</b>	<b>431</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>429</b>	<b>6465</b>	<b>0</b>	<b>10</b>	<b>358.00</b>	<b>6097.00</b>	<b>406.48</b>	<b>94.45%</b>

To the best of my knowledge,  
the above attendance information is correct.

Signed \_\_\_\_\_  
Date 1-10-25

**Report Calculations**

$(( \text{Carry Fwd} + \text{Gain} - \text{Mult. Gain} ) \times \text{School Days} ) = \text{Actual Days}$

$\text{Actual Days} - ( \text{Off Track} + \text{Days N/E} + \text{Days Absent} ) = \text{Days Attd}$

$[ \text{Days Attd} / ( \text{Actual Days} - \text{Off Track} - \text{Days N/E} ) ] \times 100 = \text{ADA}\%$

[Note: Multiple gains are for students that entered more than one time during the report time span.]

# Attendance Summary By Grade

**Sycamore Valley Academy**  
12/02/2024 to 12/27/2024 = 15 school days

Grade Level	Carry Fwd	Gain	Mult Gain	Loss	Ending	Actual Days	OffTrack	Days N/E	Days Absent	Days Attd	ADA	ADA %
-1	24	0	0	0	24	360	0	0	43.00	317.00	21.13	88.06%
0	38	0	0	0	38	570	0	0	76.00	494.00	32.93	86.67%
<b>Subtotal</b>	<b>62</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>62</b>	<b>930</b>	<b>0</b>	<b>0</b>	<b>119.00</b>	<b>811.00</b>	<b>54.06</b>	<b>87.20%</b>
1	44	0	0	0	44	660	0	0	53.00	607.00	40.47	91.97%
2	43	0	0	0	43	645	0	0	59.00	586.00	39.07	90.85%
3	44	0	0	0	44	660	0	0	45.00	615.00	41.00	93.18%
<b>Subtotal</b>	<b>131</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>131</b>	<b>1965</b>	<b>0</b>	<b>0</b>	<b>157.00</b>	<b>1808.00</b>	<b>120.54</b>	<b>92.01%</b>
4	44	0	0	0	44	660	0	0	52.00	608.00	40.53	92.12%
5	43	0	0	0	43	645	0	0	30.00	615.00	41.00	95.35%
6	43	0	0	0	43	645	0	0	0.00	645.00	43.00	100.00%
<b>Subtotal</b>	<b>130</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>130</b>	<b>1950</b>	<b>0</b>	<b>0</b>	<b>82.00</b>	<b>1868.00</b>	<b>124.53</b>	<b>95.79%</b>
7	47	0	0	0	47	705	0	0	0.00	705.00	47.00	100.00%
8	42	0	0	0	42	630	0	0	0.00	630.00	42.00	100.00%
<b>Subtotal</b>	<b>89</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>89</b>	<b>1335</b>	<b>0</b>	<b>0</b>	<b>0.00</b>	<b>1335.00</b>	<b>89.00</b>	<b>100.00%</b>
<b>Grand Total</b>	<b>412</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>412</b>	<b>6180</b>	<b>0</b>	<b>0</b>	<b>358.00</b>	<b>5822.00</b>	<b>388.13</b>	<b>94.21%</b>

To the best of my knowledge,  
the above attendance information is correct.

Signed Troy George  
Date 1/6/25

**Report Calculations**

(( Carry Fwd + Gain - Mult. Gain ) X School Days ) = Actual Days  
 Actual Days - ( Off Track + Days N/E + Days Absent ) = Days Attd  
 [ Days Attd / (Actual Days - Off Track - Days N/E ) ] X 100 = ADA%

[Note: Multiple gains are for students that entered more than one time during the report time span.]

**THE ACADEMIES CHARTER MANAGEMENT ORGANIZATION**  
**2025-2026**

**BUDGET &  
LOCAL CONTROL ACCOUNTABILITY PLAN (LCAP)  
TIMELINE**

<b>DATE</b>	<b>DESCRIPTION</b>
<b>August 6 &amp; 9, 2024 (PM &amp; AM)</b> <b>September 10 &amp; 11, 2024 (PM &amp; AM)</b> <b>October 22 &amp; 23, 2024 (PM &amp; AM)</b> <b>November 18 &amp; 19, 2024 (PM &amp; AM)</b> <b>January 14 &amp; 16, 2024 (PM &amp; AM)</b> <b>February 11 &amp; 12, 2025 (AM &amp; PM)</b> <b>March 12 &amp; 13, 2025 (PM &amp; AM)</b> <b>April 7 &amp; 8, 2025 (PM &amp; AM)</b> <b>May 13 &amp; 14, 2025 (PM &amp; AM)</b>	Monthly parent forums to provide organizational updates, receive stakeholder input, and answer questions PM @ 6:30 p.m. AM @ 9:00 a.m.
<b>January 3 - January 31, 2025</b>	Parent, staff, and student completion of organizational climate survey
<b>January 21, 2025- Board Meeting</b>	LCAP Mid-Year Monitoring Report
<b>March 4, 2025</b>  <b>March 18, 2025- Board Meeting</b>	25-26 budget priorities meeting with TACMO staff. Receive input.  Report on summary of 2025 survey data Report out budget priorities from TACMO staff
<b>May 5, 2025</b>	25-26 draft budget review with TACMO board treasurer, CMO admin, site admin, and teacher reps. Solicit feedback.
<b>May 13 &amp; 14- Parent Forums</b> <b>May 20, 2025- Board Meeting</b>  <b>May 20, 2025- Board Meeting</b>	Report plans and potential goals to address eight (8) state priorities in the 23-24 LCAP  25-26 draft budget review with TACMO board of directors. Solicit feedback.
<b>June 12, 2025- Special Board Meeting</b>	Public Hearing 25-26 LCAP and budget educational partner input regarding proposed expenditures.
<b>June 17, 2025- Board Meeting</b>	Presentation of LCAP State Indicators. Approval of 25-26 LCAP and budget.

# The Academies CMO Board Financial Update

MEAGAN MILLER

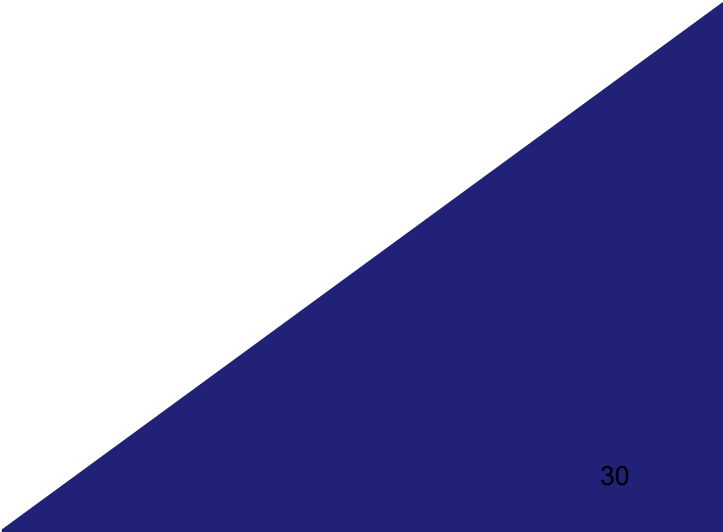
JANUARY 21, 2025





# Contents

- 1. FY25 December Financial Update
- 2. State Budget Update
- 3. Exhibits
  - FY25 December Financials



# December Financials

2024-2025



# 2024-25 Forecast Summary

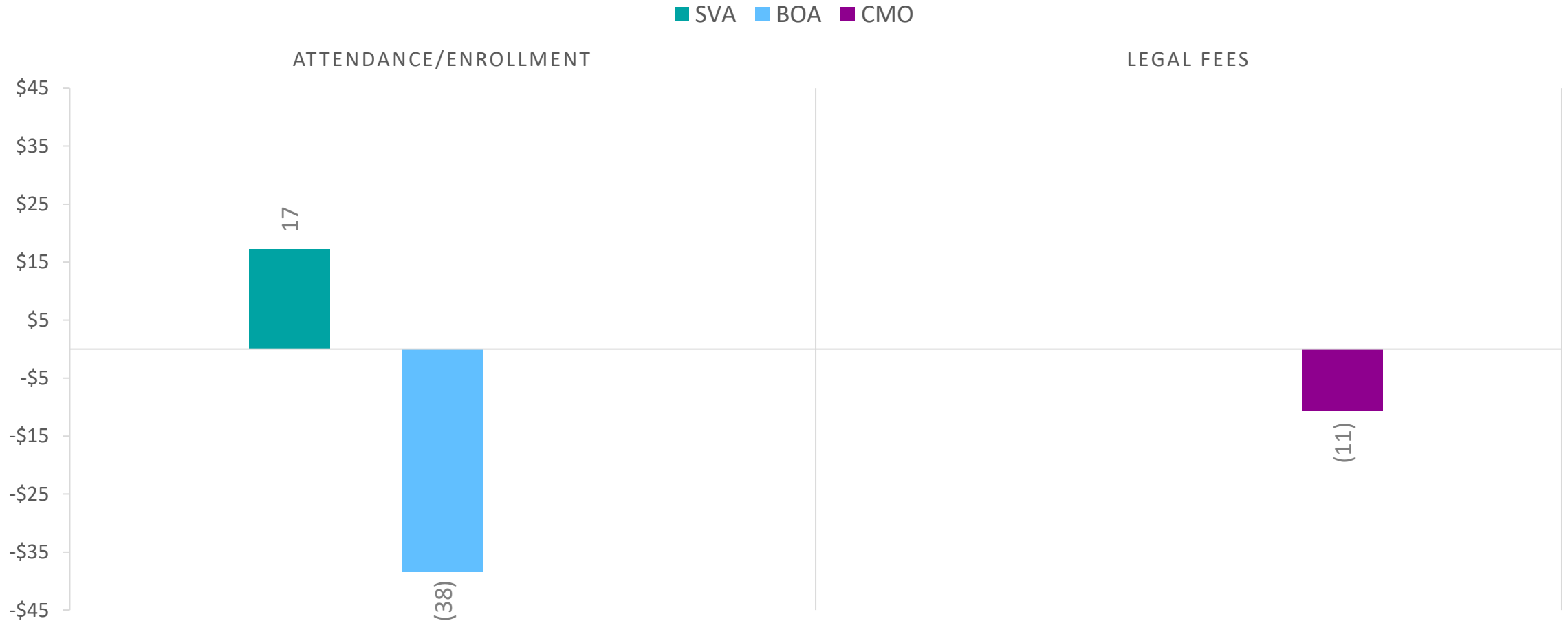
## \$41k increase to Total Operating Income

		SVA	BOA	Total	CMO
Total Revenue	Approved Budget	5,622,663	5,820,720	11,443,383	1,431,424
	Current Forecast	5,757,150	5,838,182	11,595,333	1,467,094
	Increase (decrease)	<b>134,487</b>	<b>17,462</b>	<b>151,949</b>	<b>35,671</b>
Expenses	Approved Budget	5,609,199	5,697,525	11,306,724	1,431,424
	Current Forecast	5,731,685	5,685,612	11,417,297	1,467,094
	Decrease (Increase)	<b>(122,486)</b>	<b>11,913</b>	<b>(110,573)</b>	<b>(35,671)</b>
Operating Income	Approved Budget	13,465	123,195	136,659	0
	Current Forecast	<b>25,465</b>	<b>152,570</b>	<b>178,035</b>	<b>0</b>
	Increase (decrease)	<b>12,001</b>	<b>29,375</b>	<b>41,376</b>	<b>0</b>
Fund Balance	Beg. Balance (Audited)	2,296,083	1,538,536	3,834,619	(2,946)
	Audit Adjustment	(25,090)	(9,676)	(34,766)	0
	Operating Income (Loss)	<b>25,465</b>	<b>152,570</b>	<b>178,035</b>	<b>0</b>
Ending Fund Balance (Current Forecast)		<b>2,296,458</b>	<b>1,681,430</b>	<b>3,977,888</b>	<b>0</b>
Ending Fund Balance as % of Expenses		<b>40%</b>	<b>30%</b>	<b>35%</b>	



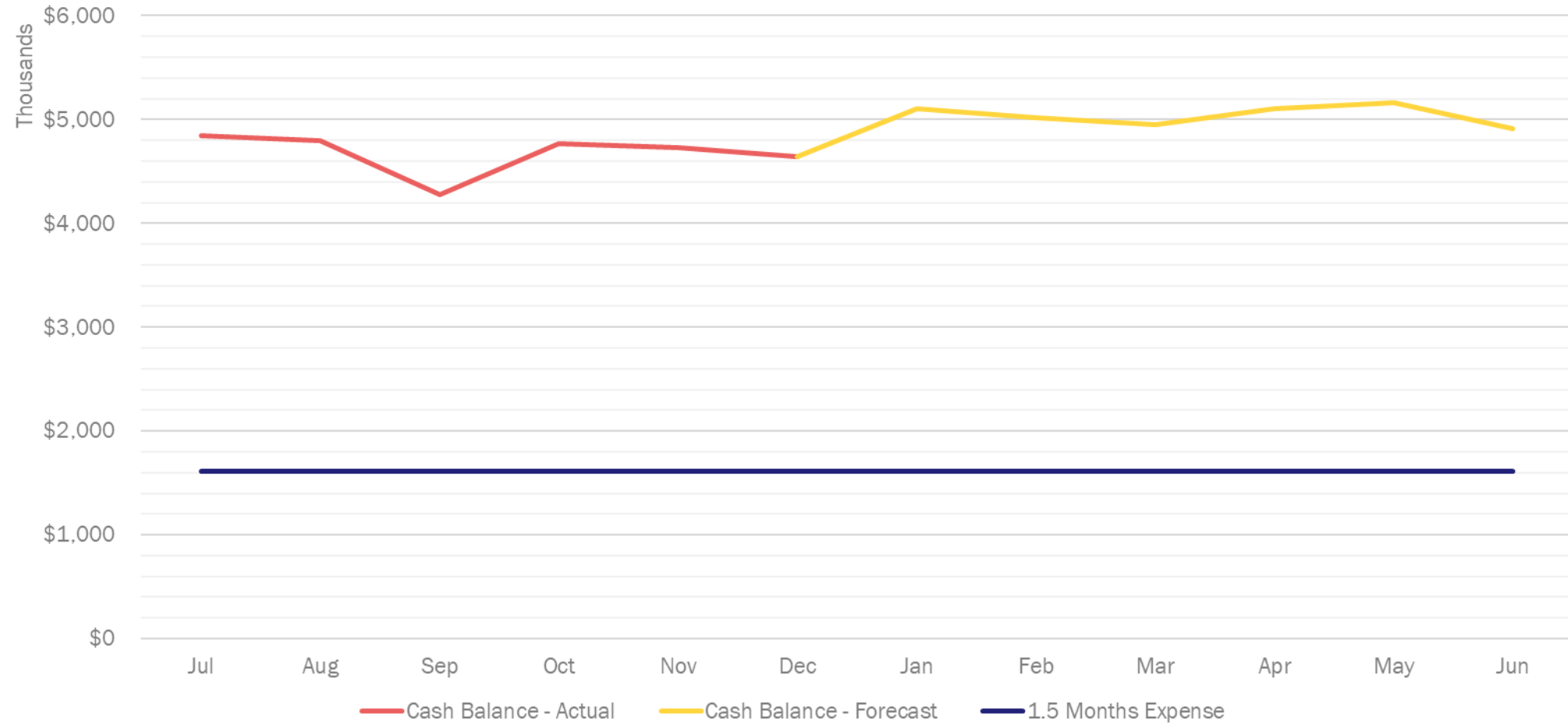
# 2024-25 Current Forecast vs Previous Forecast

Key Driver: Enrollment and Attendance + smaller adjustments



# Monthly Cash Balance

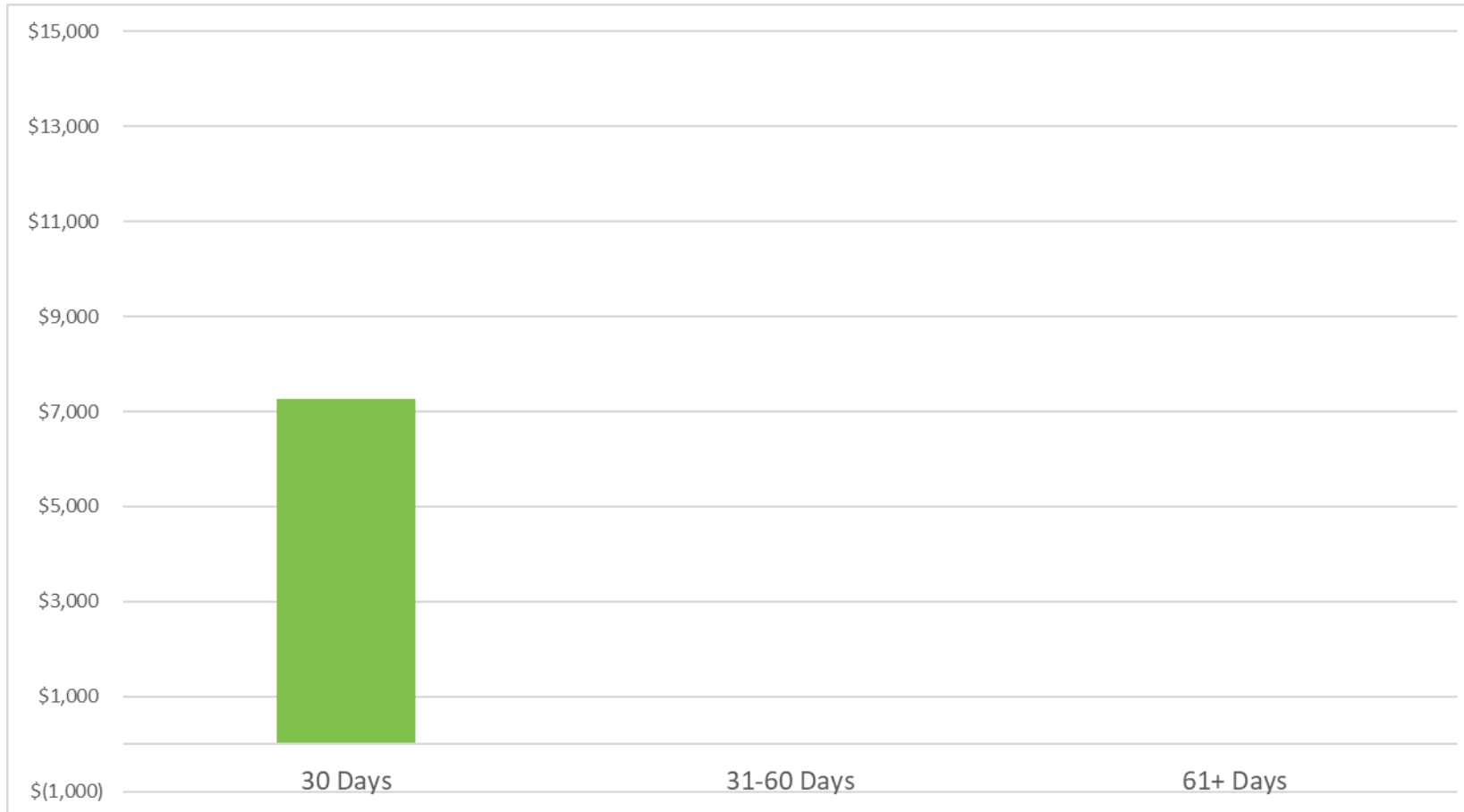
As of December, 131 days cash on hand



# Accounts Payable Aging



As of 12/31/24, TACMO had \$7.3k invoices on Aging AP

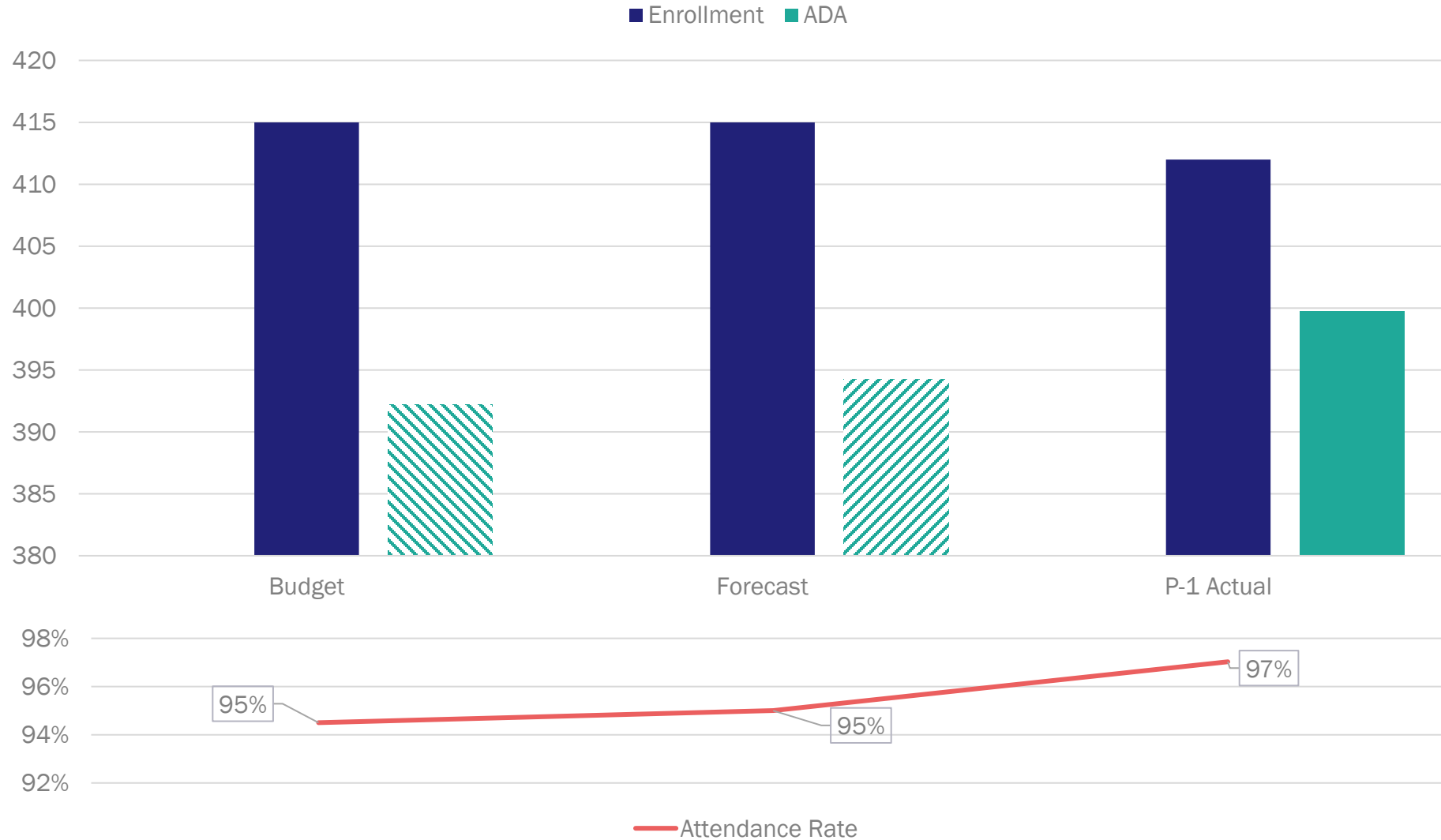


Aging AP represents invoices submitted to EdTec but not paid as of last day of the month

# SVA FY25 Enrollment and Attendance



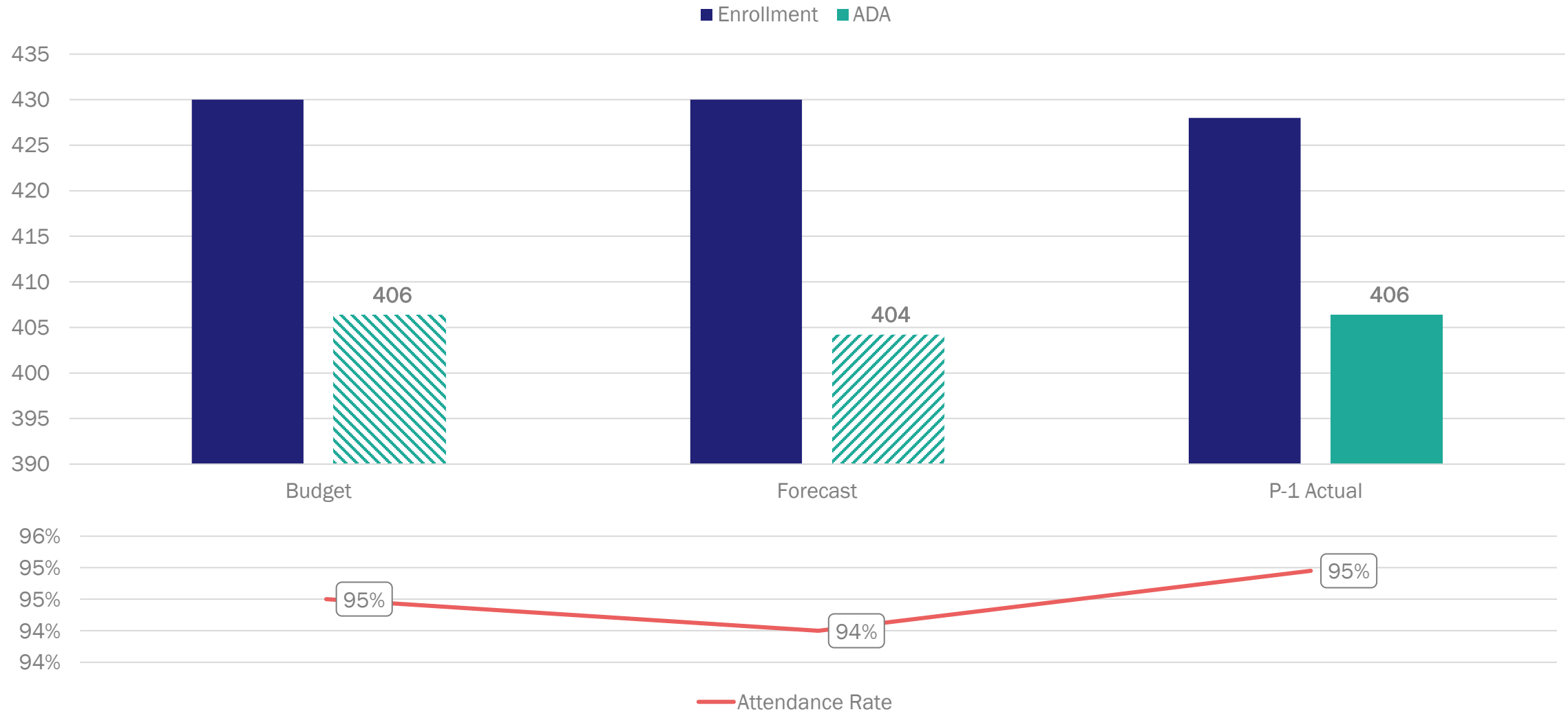
Attendance trending higher than budget; Forecast adjusted



# BOA FY25 Enrollment and Attendance



Forecast adjusted down to align with actuals



# State Budget Updates

January 2025



# Governor's January Budget – 2025-26

## 2.43% COLA

- 0.5 percentage point less than June estimate
- Affects SpEd, MBG, SB740, Nutrition

## New Funding

- Student Supports & Professional Development Discretionary Block Grant
- ~\$325/ADA, but may be calculated on FTE or UPP
- Allowable expenses: PD, teacher recruitment & retention, career pathways

## Improved Funding

- TK: Proposes +\$600/TK to allow staff reduction from 12:1 to 10:1
- ELOP: Cut-off for higher rate reduced from 75% to 55% UPP
- LREBG: Additional \$114/FY22 UPP tagged on original entitlement

## Continued Funding

- Literacy & Math Coaches: \$500M but 95% UPP threshold
- Kitchen Infrastructure: \$150M
- Universal Meals: \$106M to fully fund free meals

# Exhibits

2024-2025





**SVA**  
**Income Statement**  
**As of Dec FY2025**

	Actual			YTD	Budget & Forecast						
	Oct	Nov	Dec	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
<b>SUMMARY</b>											
<b>Revenue</b>											
LCFF Entitlement	533,830	325,874	265,153	1,465,012	4,552,641	4,560,917	4,583,904	22,987	31,263	3,118,892	32%
Federal Revenue	-	4,474	10,901	15,375	179,235	199,235	201,734	2,499	22,499	186,359	8%
Other State Revenues	75,236	23,521	63,586	188,477	807,482	884,300	885,961	1,660	78,479	697,484	21%
Local Revenues	2,935	2,113	84	87,908	78,806	78,806	80,052	1,246	1,246	(7,856)	110%
Fundraising and Grants	1,071	815	2,923	10,315	4,500	4,500	5,500	1,000	1,000	(4,815)	188%
<b>Total Revenue</b>	<b>613,073</b>	<b>356,797</b>	<b>342,647</b>	<b>1,767,088</b>	<b>5,622,663</b>	<b>5,727,758</b>	<b>5,757,150</b>	<b>29,392</b>	<b>134,487</b>	<b>3,990,063</b>	<b>31%</b>
<b>Expenses</b>											
Compensation and Benefits	349,009	366,268	332,008	1,926,573	3,986,956	4,087,745	4,087,745	-	(100,789)	2,161,171	47%
Books and Supplies	5,569	2,710	2,947	59,796	155,169	185,043	194,043	(9,000)	(38,874)	134,247	31%
Services and Other Operating Expenditures	45,078	43,450	26,503	178,091	1,445,187	1,433,426	1,438,000	(4,573)	7,187	1,259,909	12%
Depreciation	-	-	9,106	9,106	21,887	11,897	11,897	-	9,990	2,792	77%
Other Outflows & Amortization	-	-	-	-	-	-	-	-	-	-	-
<b>Total Expenses</b>	<b>399,656</b>	<b>412,427</b>	<b>370,563</b>	<b>2,173,566</b>	<b>5,609,199</b>	<b>5,718,112</b>	<b>5,731,685</b>	<b>(13,573)</b>	<b>(122,486)</b>	<b>3,558,119</b>	<b>38%</b>
<b>Operating Income</b>	<b>213,417</b>	<b>(55,631)</b>	<b>(27,916)</b>	<b>(406,478)</b>	<b>13,465</b>	<b>9,647</b>	<b>25,465</b>	<b>15,819</b>	<b>12,001</b>	<b>431,943</b>	
<b>Fund Balance</b>											
Beginning Balance (Unaudited)					2,210,214	2,210,214	2,296,083				
Audit Adjustment					-	-	(25,090)				
Operating Income					13,465	9,647	25,465				
<b>Ending Fund Balance</b>					<b>2,223,678</b>	<b>2,219,861</b>	<b>2,296,458</b>				
Fund Balance as a % of Expenses					40%	39%	40%				

**SVA**  
**Income Statement**  
**As of Dec FY2025**

	Actual			YTD	Budget & Forecast						
	Oct	Nov	Dec	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
<b>KEY ASSUMPTIONS</b>											
<b>Enrollment Summary</b>											
K-3					196	196	196	-	-		
4-6					141	141	141	-	-		
7-8					78	78	78	-	-		
<b>Total Enrolled</b>					<b>415</b>	<b>415</b>	<b>415</b>	-	-		
<b>ADA %</b>											
K-3					94.5%	94.5%	95.0%	0.5%	0.5%		
4-6					94.5%	94.5%	95.0%	0.5%	0.5%		
7-8					94.5%	94.5%	95.0%	0.5%	0.5%		
<b>Average ADA %</b>					<b>94.5%</b>	<b>94.5%</b>	<b>95.0%</b>	<b>0.5%</b>	<b>0.5%</b>		
<b>ADA</b>											
K-3					185.22	185.22	186.20	0.98	0.98		
4-6					133.25	133.25	133.95	0.70	0.70		
7-8					73.71	73.71	74.10	0.39	0.39		
<b>Total ADA</b>					<b>392.18</b>	<b>392.18</b>	<b>394.25</b>	<b>2.07</b>	<b>2.07</b>		

**SVA**  
**Income Statement**  
**As of Dec FY2025**

	Actual			YTD	Budget & Forecast						
	Oct	Nov	Dec	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
<b>REVENUE</b>											
<b>LCFF Entitlement</b>											
8011 Charter Schools General Purpose Entitlement - State Aid	265,153	265,153	265,153	1,090,073	2,527,318	3,238,243	3,254,248	16,005	726,930	2,164,176	33%
8012 Education Protection Account Entitlement	177,595	-	-	177,595	1,234,299	541,138	543,994	2,856	(690,305)	366,399	33%
8096 Charter Schools in Lieu of Property Taxes	91,082	60,721	-	197,345	791,023	781,536	785,661	4,125	(5,362)	588,317	25%
<b>SUBTOTAL - LCFF Entitlement</b>	<b>533,830</b>	<b>325,874</b>	<b>265,153</b>	<b>1,465,012</b>	<b>4,552,641</b>	<b>4,560,917</b>	<b>4,583,904</b>	<b>22,987</b>	<b>31,263</b>	<b>3,118,892</b>	<b>32%</b>
<b>Federal Revenue</b>											
8181 Special Education - Entitlement	-	-	-	-	86,160	86,160	86,160	-	-	86,160	0%
8291 Title I	-	-	10,901	10,901	42,551	42,551	44,948	2,397	2,397	34,047	24%
8292 Title II	-	1,974	-	1,974	7,951	7,951	8,053	102	102	6,079	25%
8294 Title IV	-	2,500	-	2,500	10,000	10,000	10,000	-	-	7,500	25%
8296 SRSA Grant	-	-	-	-	32,573	32,573	32,573	-	-	32,573	0%
8299 All Other Federal Revenue	-	-	-	-	-	20,000	20,000	-	20,000	20,000	0%
<b>SUBTOTAL - Federal Revenue</b>	<b>-</b>	<b>4,474</b>	<b>10,901</b>	<b>15,375</b>	<b>179,235</b>	<b>199,235</b>	<b>201,734</b>	<b>2,499</b>	<b>22,499</b>	<b>186,359</b>	<b>8%</b>
<b>Other State Revenue</b>											
8319 Other State Apportionments - Prior Years	905	-	-	905	-	-	905	905	905	-	100%
8381 Special Education - Entitlement (State)	50,810	-	32,426	83,236	139,783	139,783	139,783	-	-	56,547	60%
8382 Special Education Reimbursement (State)	2,847	2,847	2,847	11,705	31,261	31,261	31,426	165	165	19,721	37%
8550 Mandated Cost Reimbursements	-	-	7,640	7,640	7,583	7,640	7,640	-	57	0	100%
8560 State Lottery Revenue	-	-	-	-	101,994	111,825	112,415	590	10,421	112,415	0%
8590 All Other State Revenue	-	-	-	2,738	268,213	314,443	314,443	-	46,230	311,705	1%
8591 Prop 28 Arts & Music in Schools	4,928	4,928	4,928	17,521	56,833	102,512	102,512	-	45,678	84,990	17%
8593 ELO-Program	15,746	-	15,746	48,987	201,814	176,836	176,836	-	(24,978)	127,850	28%
8596 Other State Revenue 6	-	15,746	-	15,746	-	-	-	-	-	(15,746)	
<b>SUBTOTAL - Other State Revenue</b>	<b>75,236</b>	<b>23,521</b>	<b>63,586</b>	<b>188,477</b>	<b>807,482</b>	<b>884,300</b>	<b>885,961</b>	<b>1,660</b>	<b>78,479</b>	<b>697,484</b>	<b>21%</b>
<b>Local Revenue</b>											
8660 Interest	81	1,539	84	556	7,182	7,182	5,000	(2,182)	(2,182)	4,444	11%
8689 FUA Reimbursement	-	-	-	-	71,624	71,624	71,624	-	-	71,624	0%
8699 All Other Local Revenue	2,854	573	-	3,428	-	-	3,428	3,428	3,428	0	100%
8999 Uncategorized Revenue	-	-	-	83,924	-	-	-	-	-	(83,924)	
<b>SUBTOTAL - Local Revenue</b>	<b>2,935</b>	<b>2,113</b>	<b>84</b>	<b>87,908</b>	<b>78,806</b>	<b>78,806</b>	<b>80,052</b>	<b>1,246</b>	<b>1,246</b>	<b>(7,856)</b>	<b>110%</b>
<b>Fundraising and Grants</b>											
8801 Donations - Parents	-	-	-	50	-	-	-	-	-	(50)	
8802 Donations - Private	250	-	1,093	3,793	-	-	-	-	-	(3,793)	
8803 Fundraising	821	815	1,830	5,472	4,500	4,500	5,500	1,000	1,000	28	99%
8811 PTO Fundraising	-	-	-	1,000	-	-	-	-	-	(1,000)	
<b>SUBTOTAL - Fundraising and Grants</b>	<b>1,071</b>	<b>815</b>	<b>2,923</b>	<b>10,315</b>	<b>4,500</b>	<b>4,500</b>	<b>5,500</b>	<b>1,000</b>	<b>1,000</b>	<b>(4,815)</b>	<b>188%</b>
<b>TOTAL REVENUE</b>	<b>613,073</b>	<b>356,797</b>	<b>342,647</b>	<b>1,767,088</b>	<b>5,622,663</b>	<b>5,727,758</b>	<b>5,757,150</b>	<b>29,392</b>	<b>134,487</b>	<b>3,990,063</b>	<b>31%</b>

**SVA**  
**Income Statement**  
**As of Dec FY2025**

	Actual			YTD	Budget & Forecast							
	Oct	Nov	Dec	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent	
<b>EXPENSES</b>												
<b>Compensation &amp; Benefits</b>												
<b>Certificated Salaries</b>												
1100	Teachers Salaries	125,877	126,096	125,898	682,547	1,286,996	1,286,996	1,286,996	-	-	604,449	53%
1101	Teacher - Stipends	1,125	-	5,900	27,264	84,643	69,643	69,643	-	15,000	42,379	39%
1103	Teacher - Substitute Pay	7,998	8,536	4,144	38,433	75,750	75,750	75,750	-	-	37,318	51%
1111	Teacher - Specialist	12,407	12,407	12,407	66,139	197,432	197,432	197,432	-	-	131,293	33%
1148	Teacher - Special Ed	27,724	27,637	27,235	154,931	289,318	304,318	304,318	-	(15,000)	149,386	51%
1150	Teacher - Intervention	13,374	13,374	13,374	74,117	270,216	264,861	264,861	-	5,355	190,743	28%
1300	Certificated Supervisor & Administrator Salaries	22,512	22,512	22,512	137,433	271,337	271,337	271,337	-	(0)	133,904	51%
	<b>SUBTOTAL - Certificated Salaries</b>	<b>211,017</b>	<b>210,562</b>	<b>211,469</b>	<b>1,180,863</b>	<b>2,475,692</b>	<b>2,470,337</b>	<b>2,470,337</b>	-	<b>5,355</b>	<b>1,289,473</b>	<b>48%</b>
<b>Classified Salaries</b>												
2100	Classified Instructional Aide Salaries	27,025	32,750	19,945	132,862	209,951	278,332	278,332	-	(68,381)	145,470	48%
2103	Classified - Special Education	17,369	21,047	13,613	81,828	154,661	183,755	183,755	-	(29,094)	101,927	45%
2400	Classified Clerical & Office Salaries	14,113	15,259	11,481	77,125	144,474	144,474	144,474	-	-	67,349	53%
2930	Other Classified - Maintenance/grounds	3,899	4,158	3,433	25,125	47,008	47,008	47,008	-	-	21,883	53%
2935	Other Classified - Substitute	353	1,687	1,783	5,526	15,000	15,000	15,000	-	-	9,474	37%
2940	Other Classified - Summer	-	-	-	-	10,576	10,576	10,576	-	-	10,576	0%
	<b>SUBTOTAL - Classified Salaries</b>	<b>62,758</b>	<b>76,247</b>	<b>48,909</b>	<b>322,466</b>	<b>581,671</b>	<b>679,146</b>	<b>679,146</b>	-	<b>(97,475)</b>	<b>356,680</b>	<b>47%</b>
<b>Employee Benefits</b>												
3100	STRS	39,444	39,463	38,921	211,754	469,992	468,969	468,969	-	1,023	257,215	45%
3300	OASDI-Medicare-Alternative	8,021	9,079	6,800	41,921	81,325	88,705	88,705	-	(7,379)	46,783	47%
3400	Health & Welfare Benefits	25,440	28,559	23,715	158,940	327,644	327,644	327,644	-	-	168,704	49%
3500	Unemployment Insurance	323	341	216	2,365	15,355	16,746	16,746	-	(1,391)	14,382	14%
3600	Workers Comp Insurance	1,874	1,874	1,874	7,497	30,574	31,495	31,495	-	(921)	23,997	24%
3900	403b contribution	132	144	103	767	4,703	4,703	4,703	-	-	3,937	16%
	<b>SUBTOTAL - Employee Benefits</b>	<b>75,234</b>	<b>79,459</b>	<b>71,629</b>	<b>423,244</b>	<b>929,593</b>	<b>938,262</b>	<b>938,262</b>	-	<b>(8,669)</b>	<b>515,018</b>	<b>45%</b>
<b>Books &amp; Supplies</b>												
4100	Approved Textbooks & Core Curricula Materials	-	-	-	209	22,000	10,000	10,000	-	12,000	9,791	2%
4200	Books & Other Reference Materials	2,819	-	-	2,921	10,335	8,334	8,334	-	2,000	5,413	35%
4300	Materials & Supplies	-	239	-	1,060	5,509	5,509	5,509	-	-	4,450	19%
4320	Educational Software	-	-	-	24,296	23,050	24,296	24,296	-	(1,246)	0	100%
4325	Instructional Materials & Supplies	-	254	23	1,303	7,800	48,678	48,678	-	(40,878)	47,375	3%
4326	Art	149	337	-	1,497	14,399	14,399	14,399	-	-	12,901	10%
4330	Office Supplies	908	672	980	4,585	12,850	12,850	12,850	-	-	8,265	36%
4335	PE Supplies	65	-	-	1,439	2,323	2,323	2,323	-	-	884	62%
4346	Teacher Supplies	768	418	115	6,317	19,950	21,700	21,700	-	(1,750)	15,383	29%
4355	Science	165	38	-	330	800	800	800	-	-	470	41%
4410	Classroom Furniture, Equipment & Supplies	-	-	142	142	5,500	5,500	14,500	(9,000)	(9,000)	14,358	1%
4420	Computers: individual items less than \$5k	-	-	1,442	11,827	15,000	15,000	15,000	-	-	3,173	79%
4430	Non Classroom Related Furniture, Equipment & Supplies	695	694	246	3,812	8,835	8,835	8,835	-	-	5,023	43%
4710	Student Food Services	-	-	-	-	5,000	5,000	5,000	-	-	5,000	0%
4720	Other Food	-	58	-	58	1,818	1,818	1,818	-	-	1,761	3%
	<b>SUBTOTAL - Books and Supplies</b>	<b>5,569</b>	<b>2,710</b>	<b>2,947</b>	<b>59,796</b>	<b>155,169</b>	<b>185,043</b>	<b>194,043</b>	<b>(9,000)</b>	<b>(38,874)</b>	<b>134,247</b>	<b>31%</b>

**SVA**  
**Income Statement**  
**As of Dec FY2025**

	Actual			YTD	Budget & Forecast							
	Oct	Nov	Dec	Actual YTD	Approved	Previous	Current	Previous	Approved	Current	% Current	
					Budget v1	Forecast	Forecast	Forecast vs. Current	Budget v1 vs. Current	Forecast Remaining	Forecast Spent	
<b>Services &amp; Other Operating Expenses</b>												
5215 Travel - Mileage, Parking, Tolls	13	21	137	525	2,000	2,000	2,000	-	-	1,475	26%	
5220 Travel and Lodging	563	942	674	2,591	4,500	4,500	4,500	-	-	1,909	58%	
5225 Travel - Meals & Entertainment	-	-	109	167	400	400	400	-	-	233	42%	
5305 Dues & Membership - Professional	-	-	-	-	1,575	1,575	1,575	-	-	1,575	0%	
5400 Insurance	-	-	-	-	-	4,797	4,797	-	(4,797)	4,797	0%	
5515 Janitorial, Gardening Services & Supplies	116	948	-	1,112	6,927	6,927	6,927	-	-	5,815	16%	
5525 Utilities - Waste	2,301	-	761	5,310	8,847	8,847	8,847	-	-	3,537	60%	
5610 Rent	-	-	-	-	274,284	274,284	274,284	-	-	274,284	0%	
5615 Repairs and Maintenance - Building	2,400	-	-	2,414	-	2,414	2,414	-	(2,414)	-	100%	
5619 Non-Cash Lease Adjustment	-	-	-	-	57,305	(6,410)	(6,410)	-	63,715	(6,410)	0%	
5809 Banking Fees	272	-	255	1,042	3,120	3,120	3,120	-	-	2,078	33%	
5820 Non-Instructional Consultants	-	1,935	537	2,472	4,900	4,900	4,900	-	-	2,428	50%	
5824 District Oversight Fees	-	-	-	-	45,526	45,609	45,839	(230)	(313)	45,839	0%	
5830 Field Trips Expenses	859	-	602	1,862	30,000	30,000	30,000	-	-	28,138	6%	
5833 Fines and Penalties	-	-	-	-	711	711	711	-	-	711	0%	
5836 Fingerprinting	75	-	-	75	600	600	600	-	-	525	12%	
5839 Fundraising Expenses	-	-	-	3,257	13,559	11,511	11,511	-	2,048	8,254	28%	
5845 Legal Fees	-	1,894	470	2,364	5,254	8,250	5,000	3,250	254	2,636	47%	
5848 Licenses and Other Fees	-	-	-	289	-	289	289	-	(289)	-	100%	
5851 Marketing and Student Recruiting	-	3,573	-	3,941	5,706	5,706	5,706	-	-	1,765	69%	
5854 Consultants - CALPADS	-	-	-	-	6,140	6,140	1,000	5,140	5,140	1,000	0%	
5857 Payroll Fees	495	691	512	3,149	6,600	6,600	6,600	-	-	3,451	48%	
5858 CMO Services	-	-	-	-	639,157	654,650	660,216	(5,566)	(21,059)	660,216	0%	
5860 Printing and Reproduction	7,070	2,346	1,894	14,731	24,767	24,767	24,767	-	-	10,036	59%	
5861 Prior Yr Exp (not accrued)	730	-	-	4,625	-	5,000	5,000	-	(5,000)	375	93%	
5863 Professional Development	987	500	694	6,492	34,159	24,159	24,159	-	10,000	17,667	27%	
5869 Special Education Contract Instructors	8,965	9,791	7,205	35,867	117,271	117,271	117,271	-	-	81,405	31%	
5875 Staff Recruiting	-	-	150	565	1,196	1,196	1,196	-	-	631	47%	
5877 Student Activities	1,063	554	2,384	5,352	10,400	10,400	10,400	-	-	5,048	51%	
5878 Student Assessment	-	1,096	28	3,857	6,928	6,928	6,928	-	-	3,071	56%	
5880 Student Health Services	60	289	157	272	10,000	10,000	10,000	-	-	9,728	3%	
5881 Student Information System	2,246	896	896	30,870	11,258	29,078	36,246	(7,168)	(24,988)	5,376	85%	
5893 Transportation - Student	-	17,871	8,936	26,807	89,355	89,355	89,355	-	-	62,549	30%	
5899 Miscellaneous Operating Expenses	16,703	-	-	16,703	-	16,703	16,703	-	(16,703)	-	100%	
5910 Communications - Internet / Website Fees	87	28	28	577	19,756	18,163	18,163	-	1,593	17,586	3%	
5915 Postage and Delivery	73	73	73	803	1,946	1,946	1,946	-	-	1,143	41%	
5920 Communications - Telephone & Fax	-	-	-	-	1,040	1,040	1,040	-	-	1,040	0%	
<b>SUBTOTAL - Services &amp; Other Operating Exp.</b>	<b>45,078</b>	<b>43,450</b>	<b>26,503</b>	<b>178,091</b>	<b>1,445,187</b>	<b>1,433,426</b>	<b>1,438,000</b>	<b>(4,573)</b>	<b>7,187</b>	<b>1,259,909</b>	<b>12%</b>	
<b>Capital Outlay &amp; Depreciation</b>												
6900 Depreciation	-	-	9,106	9,106	21,887	11,897	11,897	-	9,990	2,792	77%	
<b>SUBTOTAL - Capital Outlay &amp; Depreciation</b>	<b>-</b>	<b>-</b>	<b>9,106</b>	<b>9,106</b>	<b>21,887</b>	<b>11,897</b>	<b>11,897</b>	<b>-</b>	<b>9,990</b>	<b>2,792</b>	<b>77%</b>	
<b>Other Outflows &amp; Amortization</b>												
<b>SUBTOTAL - Other Outflows &amp; Amortization</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	
<b>TOTAL EXPENSES</b>	<b>399,656</b>	<b>412,427</b>	<b>370,563</b>	<b>2,173,566</b>	<b>5,609,199</b>	<b>5,718,112</b>	<b>5,731,685</b>	<b>(13,573)</b>	<b>(122,486)</b>	<b>3,558,119</b>	<b>38%</b>	

**BOA**  
**Income Statement**  
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	Actual			YTD	Budget & Forecast						
	Oct	Nov	Dec	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
<b>SUMMARY</b>											
<b>Revenue</b>											
LCFF Entitlement	455,469	404,906	342,761	1,630,590	4,840,654	4,840,660	4,803,615	(37,045)	(37,038)	3,173,026	34%
Federal Revenue	-	4,625	12,265	16,890	253,040	253,040	254,590	1,550	1,550	237,700	7%
Other State Revenues	49,144	30,011	70,997	183,503	663,671	712,051	711,976	(74)	48,305	528,473	26%
Local Revenues	317	1,451	-	(291)	60,500	60,500	60,500	-	-	60,791	0%
Fundraising and Grants	360	1,685	1,550	6,598	2,855	4,249	7,500	3,251	4,645	902	88%
<b>Total Revenue</b>	<b>505,290</b>	<b>442,677</b>	<b>427,573</b>	<b>1,837,289</b>	<b>5,820,720</b>	<b>5,870,500</b>	<b>5,838,182</b>	<b>(32,318)</b>	<b>17,462</b>	<b>4,000,893</b>	<b>31%</b>
<b>Expenses</b>											
Compensation and Benefits	363,151	368,380	347,608	1,990,188	4,108,233	4,082,968	4,082,968	-	25,266	2,092,780	49%
Books and Supplies	7,435	5,449	2,891	65,736	181,681	202,689	202,689	-	(21,009)	136,953	32%
Services and Other Operating Expenditures	21,635	34,254	15,981	136,326	1,407,611	1,388,783	1,391,516	(2,733)	16,095	1,255,191	10%
Depreciation	-	-	1,063	1,063	-	8,439	8,439	-	(8,439)	7,376	13%
Other Outflows & Amortization	212	-	-	212	-	-	-	-	-	(212)	
<b>Total Expenses</b>	<b>392,432</b>	<b>408,084</b>	<b>367,543</b>	<b>2,193,524</b>	<b>5,697,525</b>	<b>5,682,879</b>	<b>5,685,612</b>	<b>(2,733)</b>	<b>11,913</b>	<b>3,492,088</b>	<b>39%</b>
<b>Operating Income</b>	<b>112,858</b>	<b>34,594</b>	<b>60,029</b>	<b>(356,235)</b>	<b>123,195</b>	<b>187,621</b>	<b>152,570</b>	<b>(35,051)</b>	<b>29,375</b>	<b>508,805</b>	
<b>Fund Balance</b>											
Beginning Balance (Unaudited)					1,236,980	1,236,980	1,538,536				
Audit Adjustment					-	-	(9,676)				
Operating Income					123,195	187,621	152,570				
<b>Ending Fund Balance</b>					<b>1,360,174</b>	<b>1,424,601</b>	<b>1,681,430</b>				
Fund Balance as a % of Expenses					24%	25%	30%				

**BOA**  
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	Oct	Nov	Dec	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
<b>KEY ASSUMPTIONS</b>											
<b>Enrollment Summary</b>											
K-3					220	220	220	-	-		
4-6					149	149	149	-	-		
7-8					61	61	61	-	-		
<b>Total Enrolled</b>					<b>430</b>	<b>430</b>	<b>430</b>	-	-		
<b>ADA %</b>											
K-3					94.5%	94.5%	94.0%	-0.5%	-0.5%		
4-6					94.5%	94.5%	94.0%	-0.5%	-0.5%		
7-8					94.5%	94.5%	94.0%	-0.5%	-0.5%		
<b>Average ADA %</b>					<b>94.5%</b>	<b>94.5%</b>	<b>94.0%</b>	<b>-0.5%</b>	<b>-0.5%</b>		
<b>ADA</b>											
K-3					207.90	207.90	206.80	(1.10)	(1.10)		
4-6					140.81	140.81	140.06	(0.75)	(0.75)		
7-8					57.65	57.65	57.34	(0.31)	(0.31)		
<b>Total ADA</b>					<b>406.36</b>	<b>406.36</b>	<b>404.20</b>	<b>(2.16)</b>	<b>(2.16)</b>		

**BOA**  
**Income Statement**  
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		Actual			YTD	Budget & Forecast						
		Oct	Nov	Dec	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
<b>REVENUE</b>												
<b>LCFF Entitlement</b>												
8011	Charter Schools General Purpose Entitlement - State Aid	342,761	342,761	342,761	1,409,127	3,939,758	3,949,594	3,917,286	(32,308)	(22,472)	2,508,158	36%
8012	Education Protection Account Entitlement	19,491	-	-	19,491	81,272	81,272	80,840	(432)	(432)	61,349	24%
8096	Charter Schools in Lieu of Property Taxes	93,218	62,145	-	201,971	819,624	809,794	805,490	(4,304)	(14,134)	603,518	25%
<b>SUBTOTAL - LCFF Entitlement</b>		<b>455,469</b>	<b>404,906</b>	<b>342,761</b>	<b>1,630,590</b>	<b>4,840,654</b>	<b>4,840,660</b>	<b>4,803,615</b>	<b>(37,045)</b>	<b>(37,038)</b>	<b>3,173,026</b>	<b>34%</b>
<b>Federal Revenue</b>												
8181	Special Education - Entitlement	-	-	-	-	88,218	88,218	88,218	-	-	88,218	0%
8291	Title I	-	-	12,265	12,265	49,436	49,436	50,531	1,095	1,095	38,266	24%
8292	Title II	-	2,125	-	2,125	8,215	8,215	8,670	455	455	6,545	25%
8294	Title IV	-	2,500	-	2,500	10,000	10,000	10,000	-	-	7,500	25%
8296	SRSA Grant	-	-	-	-	28,925	28,925	28,925	-	-	28,925	0%
8299	All Other Federal Revenue	-	-	-	-	68,246	68,246	68,246	-	-	68,246	0%
<b>SUBTOTAL - Federal Revenue</b>		<b>-</b>	<b>4,625</b>	<b>12,265</b>	<b>16,890</b>	<b>253,040</b>	<b>253,040</b>	<b>254,590</b>	<b>1,550</b>	<b>1,550</b>	<b>237,700</b>	<b>7%</b>
<b>Other State Revenue</b>												
8319	Other State Apportionments - Prior Years	708	-	-	714	-	-	714	714	714	0	100%
8381	Special Education - Entitlement (State)	18,426	-	33,167	51,592	174,245	174,245	174,245	-	-	122,653	30%
8382	Special Education Reimbursement (State)	2,914	2,914	2,914	11,979	32,391	32,391	32,219	(172)	(172)	20,240	37%
8550	Mandated Cost Reimbursements	-	-	7,820	7,820	7,761	7,820	7,820	-	58	(0)	100%
8560	State Lottery Revenue	-	-	-	-	105,682	115,869	115,253	(616)	9,570	115,253	0%
8590	All Other State Revenue	-	-	-	2,833	-	52,786	52,786	-	52,786	49,953	5%
8591	Prop 28 Arts & Music in Schools	5,099	5,099	5,099	18,131	58,701	58,701	58,701	-	-	40,570	31%
8593	ELO-Program	21,998	-	21,998	68,437	284,890	270,239	270,239	-	(14,651)	201,802	25%
8596	Other State Revenue 6	-	21,998	-	21,998	-	-	-	-	-	(21,998)	
<b>SUBTOTAL - Other State Revenue</b>		<b>49,144</b>	<b>30,011</b>	<b>70,997</b>	<b>183,503</b>	<b>663,671</b>	<b>712,051</b>	<b>711,976</b>	<b>(74)</b>	<b>48,305</b>	<b>528,473</b>	<b>26%</b>
<b>Local Revenue</b>												
8660	Interest	-	1,451	-	(608)	500	500	500	-	-	1,108	-122%
8689	FUA Reimbursement	-	-	-	-	60,000	60,000	60,000	-	-	60,000	0%
8699	All Other Local Revenue	317	-	-	317	-	-	-	-	-	(317)	
<b>SUBTOTAL - Local Revenue</b>		<b>317</b>	<b>1,451</b>	<b>-</b>	<b>(291)</b>	<b>60,500</b>	<b>60,500</b>	<b>60,500</b>	<b>-</b>	<b>-</b>	<b>60,791</b>	<b>0%</b>
<b>Fundraising and Grants</b>												
8801	Donations - Parents	-	-	-	-	1,000	1,000	1,000	-	-	1,000	0%
8802	Donations - Private	-	-	-	114	-	-	-	-	-	(114)	
8803	Fundraising	360	1,685	1,550	6,484	1,855	3,249	6,500	3,251	4,645	16	100%
<b>SUBTOTAL - Fundraising and Grants</b>		<b>360</b>	<b>1,685</b>	<b>1,550</b>	<b>6,598</b>	<b>2,855</b>	<b>4,249</b>	<b>7,500</b>	<b>3,251</b>	<b>4,645</b>	<b>902</b>	<b>88%</b>
<b>TOTAL REVENUE</b>		<b>505,290</b>	<b>442,677</b>	<b>427,573</b>	<b>1,837,289</b>	<b>5,820,720</b>	<b>5,870,500</b>	<b>5,838,182</b>	<b>(32,318)</b>	<b>17,462</b>	<b>4,000,893</b>	<b>31%</b>



**BOA**  
**Income Statement**  
**As of Dec FY2025**

		Actual			YTD	Budget & Forecast						
		Oct	Nov	Dec	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
<b>EXPENSES</b>												
<b>Compensation &amp; Benefits</b>												
<b>Certificated Salaries</b>												
1100	Teachers Salaries	133,751	120,470	126,726	685,479	1,263,603	1,331,262	1,331,262	-	(67,659)	645,783	51%
1101	Teacher - Stipends	625	-	7,000	28,303	62,074	47,074	47,074	28,303	15,000	18,771	60%
1103	Teacher - Substitute Pay	5,928	8,320	4,576	27,328	72,417	72,417	72,417	-	-	45,089	38%
1111	Teacher - Specialist	19,821	19,821	19,821	109,310	257,689	257,689	257,689	-	-	148,379	42%
1148	Teacher - Special Ed	25,906	25,819	25,417	144,964	276,501	291,501	291,501	(15,000)	-	146,538	50%
1150	Teacher - Intervention	12,159	12,159	12,159	66,787	167,109	161,754	161,754	-	5,355	94,967	41%
1300	Certificated Supervisor & Administrator Salaries	22,907	22,907	22,907	147,936	282,949	274,880	274,880	-	8,069	126,944	54%
<b>SUBTOTAL - Certificated Salaries</b>		<b>221,098</b>	<b>209,496</b>	<b>218,606</b>	<b>1,210,106</b>	<b>2,382,342</b>	<b>2,436,577</b>	<b>2,436,577</b>	-	<b>(54,235)</b>	<b>1,226,471</b>	<b>50%</b>
<b>Classified Salaries</b>												
2100	Classified Instructional Aide Salaries	33,868	44,459	28,115	188,046	471,310	363,057	363,057	-	108,254	175,011	52%
2103	Classified - Special Education	13,743	13,070	12,331	60,763	112,646	189,250	189,250	60,763	(76,604)	128,487	32%
2400	Classified Clerical & Office Salaries	11,985	12,685	9,300	63,886	136,880	118,570	118,570	-	18,310	54,684	54%
2905	Other Classified - After School	-	50	(50)	-	44,440	-	-	-	44,440	-	-
2930	Other Classified - Maintenance/grounds	3,976	4,155	3,614	25,227	47,008	47,008	47,008	-	-	21,781	54%
2935	Other Classified - Substitute	1,713	2,331	1,781	7,654	-	18,000	18,000	-	(18,000)	10,346	43%
2940	Other Classified - Summer	-	-	-	-	8,653	8,653	8,653	-	-	8,653	0%
<b>SUBTOTAL - Classified Salaries</b>		<b>65,286</b>	<b>77,667</b>	<b>54,175</b>	<b>345,577</b>	<b>820,938</b>	<b>744,538</b>	<b>744,538</b>	-	<b>76,400</b>	<b>398,961</b>	<b>46%</b>
<b>Employee Benefits</b>												
3100	STRS	41,093	40,187	40,666	220,326	452,162	449,599	449,599	-	2,564	229,273	49%
3300	OASDI-Medicare-Alternative	8,209	8,732	7,116	42,539	98,276	97,412	97,412	-	863	54,873	44%
3400	Health & Welfare Benefits	25,114	29,972	24,807	161,153	300,244	300,244	300,244	-	-	139,091	54%
3500	Unemployment Insurance	335	311	223	2,430	16,888	17,436	17,436	-	(548)	15,006	14%
3600	Workers Comp Insurance	2,005	2,005	2,005	8,021	32,033	31,811	31,811	-	222	23,791	25%
3900	403b contribution	10	10	10	36	5,350	5,350	5,350	-	-	5,314	1%
<b>SUBTOTAL - Employee Benefits</b>		<b>76,766</b>	<b>81,217</b>	<b>74,827</b>	<b>434,504</b>	<b>904,954</b>	<b>901,853</b>	<b>901,853</b>	-	<b>3,101</b>	<b>467,348</b>	<b>48%</b>
<b>Books &amp; Supplies</b>												
4100	Approved Textbooks & Core Curricula Materials	679	2,052	-	4,216	9,547	9,547	9,547	-	-	5,331	44%
4200	Books & Other Reference Materials	1,852	-	-	2,066	20,283	20,283	20,283	-	-	18,217	10%
4300	Materials & Supplies	356	73	-	1,734	8,113	8,113	8,113	-	-	6,380	21%
4320	Educational Software	-	-	578	19,101	25,000	25,000	25,000	-	-	5,899	76%
4325	Instructional Materials & Supplies	119	206	234	3,672	14,212	34,821	34,821	-	(20,609)	31,149	11%
4326	Art	2,136	1,494	702	9,600	20,000	20,000	20,000	-	-	10,400	48%
4330	Office Supplies	886	627	1,139	8,521	15,926	15,926	15,926	-	-	7,405	54%
4335	PE Supplies	-	148	-	1,156	4,000	4,000	4,000	-	-	2,844	29%
4346	Teacher Supplies	690	717	62	4,775	10,800	11,200	11,200	-	(400)	6,425	43%
4355	Science	-	131	-	131	5,000	5,000	5,000	-	-	4,869	3%
4356	Recess Supplies	-	-	-	-	2,500	2,500	2,500	-	-	2,500	0%
4420	Computers: individual items less than \$5k	256	-	-	4,653	26,000	26,000	26,000	-	-	21,347	18%
4430	Non Classroom Related Furniture, Equipment & Supplies	393	-	-	5,866	13,520	13,520	13,520	-	-	7,654	43%
4710	Student Food Services	-	-	-	-	5,000	5,000	5,000	-	-	5,000	0%
4720	Other Food	68	-	177	245	1,780	1,780	1,780	-	-	1,535	14%
<b>SUBTOTAL - Books and Supplies</b>		<b>7,435</b>	<b>5,449</b>	<b>2,891</b>	<b>65,736</b>	<b>181,681</b>	<b>202,689</b>	<b>202,689</b>	-	<b>(21,009)</b>	<b>136,953</b>	<b>32%</b>

**BOA**  
**Income Statement**  
**As of Dec FY2025**

	Actual			YTD	Budget & Forecast							
	Oct	Nov	Dec	Actual YTD	Approved	Previous	Current	Previous	Approved	Current	% Current	
					Budget v1	Forecast	Forecast	Forecast vs. Current	Budget v1 vs. Current	Forecast Remaining	Forecast Spent	
<b>Services &amp; Other Operating Expenses</b>												
5210 Conference Fees	-	-	-	-	100	100	100	-	-	100	0%	
5215 Travel - Mileage, Parking, Tolls	-	16	-	32	2,000	2,000	2,000	-	-	1,968	2%	
5220 Travel and Lodging	563	-	674	1,238	3,500	3,500	3,500	-	-	2,262	35%	
5225 Travel - Meals & Entertainment	-	-	-	-	1,040	1,040	1,040	-	-	1,040	0%	
5305 Dues & Membership - Professional	-	-	-	-	1,500	1,500	1,500	-	-	1,500	0%	
5400 Insurance	-	-	-	-	-	4,797	4,797	-	(4,797)	4,797	0%	
5515 Janitorial, Gardening Services & Supplies	575	11,453	-	12,106	2,184	2,184	13,637	(11,453)	(11,453)	1,531	89%	
5610 Rent	-	-	-	-	317,770	317,770	317,770	-	-	317,770	0%	
5615 Repairs and Maintenance - Building	2,400	-	-	3,526	-	3,526	3,526	-	(3,526)	0	100%	
5619 Non-Cash Lease Adjustment	-	-	-	-	50,205	(23,876)	(23,876)	-	74,081	(23,876)	0%	
5820 Non-Instructional Consultants	-	1,935	537	2,737	2,400	2,400	2,737	(337)	(337)	-	100%	
5824 District Oversight Fees	-	-	-	-	48,407	48,407	48,036	370	370	48,036	0%	
5830 Field Trips Expenses	1,236	209	-	2,145	49,946	49,946	49,946	-	-	47,801	4%	
5836 Fingerprinting	-	-	-	-	440	440	440	-	-	440	0%	
5839 Fundraising Expenses	-	-	-	3,301	5,663	5,663	5,663	-	-	2,361	58%	
5845 Legal Fees	-	-	980	980	6,628	20,000	8,000	12,000	(1,372)	7,020	12%	
5851 Marketing and Student Recruiting	-	3,227	-	3,607	7,548	7,548	7,548	-	-	3,942	48%	
5854 Consultants - CALPADS	-	-	-	-	5,791	5,791	500	5,291	5,291	500	0%	
5857 Payroll Fees	519	552	569	3,102	6,903	6,903	6,903	-	-	3,801	45%	
5858 CMO Services	-	-	-	-	662,267	678,321	676,878	1,442	(14,612)	676,878	0%	
5860 Printing and Reproduction	443	3,205	1,708	11,206	24,718	24,718	24,718	-	-	13,512	45%	
5861 Prior Yr Exp (not accrued)	1,224	-	-	5,464	7,500	7,500	7,500	-	-	2,036	73%	
5863 Professional Development	742	515	880	5,336	29,694	29,694	29,694	-	-	24,358	18%	
5869 Special Education Contract Instructors	9,331	10,191	7,499	36,810	122,523	122,523	122,523	-	-	85,714	30%	
5875 Staff Recruiting	-	-	150	565	3,822	3,822	3,822	-	-	3,257	15%	
5877 Student Activities	2,010	314	1,052	4,214	10,400	10,400	10,400	-	-	6,186	41%	
5878 Student Assessment	-	1,096	28	6,301	5,527	5,527	8,407	(2,880)	(2,880)	2,105	75%	
5880 Student Health Services	317	592	60	1,379	10,400	10,400	10,400	-	-	9,021	13%	
5881 Student Information System	2,246	896	896	30,554	11,258	28,762	35,930	(7,168)	(24,672)	5,376	85%	
5893 Transportation - Student	-	-	919	919	-	-	-	-	-	(919)		
5910 Communications - Internet / Website Fees	30	30	30	177	6,343	6,343	6,343	-	-	6,166	3%	
5915 Postage and Delivery	-	24	-	627	1,024	1,024	1,024	-	-	397	61%	
5920 Communications - Telephone & Fax	-	-	-	-	110	110	110	-	-	110	0%	
<b>SUBTOTAL - Services &amp; Other Operating Exp.</b>	<b>21,635</b>	<b>34,254</b>	<b>15,981</b>	<b>136,326</b>	<b>1,407,611</b>	<b>1,388,783</b>	<b>1,391,516</b>	<b>(2,733)</b>	<b>16,095</b>	<b>1,255,191</b>	<b>10%</b>	
<b>Capital Outlay &amp; Depreciation</b>												
6900 Depreciation	-	-	1,063	1,063	-	8,439	8,439	-	(8,439)	7,376	13%	
<b>SUBTOTAL - Capital Outlay &amp; Depreciation</b>	<b>-</b>	<b>-</b>	<b>1,063</b>	<b>1,063</b>	<b>-</b>	<b>8,439</b>	<b>8,439</b>	<b>-</b>	<b>(8,439)</b>	<b>7,376</b>	<b>13%</b>	
<b>Other Outflows &amp; Amortization</b>												
7999 Uncategorized Expense	212	-	-	212	-	-	-	-	-	(212)		
<b>SUBTOTAL - Other Outflows &amp; Amortization</b>	<b>212</b>	<b>-</b>	<b>-</b>	<b>212</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(212)</b>		
<b>TOTAL EXPENSES</b>	<b>392,432</b>	<b>408,084</b>	<b>367,543</b>	<b>2,193,524</b>	<b>5,697,525</b>	<b>5,682,879</b>	<b>5,685,612</b>	<b>(2,733)</b>	<b>11,913</b>	<b>3,492,088</b>	<b>39%</b>	

**CMO**  
**Income Statement**  
**As of Dec FY2025**

	Actual			YTD	Budget & Forecast							
	Oct	Nov	Dec		Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
<b>SUMMARY</b>												
<b>Revenue</b>												
LCFF Entitlement	-	-	-	-	-	-	-	-	-	-	-	-
Federal Revenue	-	-	-	-	-	-	-	-	-	-	-	-
Other State Revenues	-	-	-	-	-	-	-	-	-	-	-	-
Local Revenues	12,943	13,474	12,117	64,603	1,431,424	1,462,971	1,467,094	4,123	35,671	1,402,491	4%	
Fundraising and Grants	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Revenue</b>	<b>12,943</b>	<b>13,474</b>	<b>12,117</b>	<b>64,603</b>	<b>1,431,424</b>	<b>1,462,971</b>	<b>1,467,094</b>	<b>4,123</b>	<b>35,671</b>	<b>1,402,491</b>	<b>4%</b>	
<b>Expenses</b>												
Compensation and Benefits	82,130	89,979	83,187	535,284	949,846	962,893	962,893	-	(13,047)	427,609	56%	
Books and Supplies	3,648	5,959	3,308	22,454	97,540	97,540	93,670	3,870	3,870	71,215	24%	
Services and Other Operating Expenditures	39,263	28,201	31,385	220,698	384,038	402,538	410,532	(7,993)	(26,494)	189,834	54%	
Depreciation	-	-	-	-	-	-	-	-	-	-	-	-
Other Outflows & Amortization	360	-	-	360	-	-	-	-	-	(360)	-	
<b>Total Expenses</b>	<b>125,400</b>	<b>124,139</b>	<b>117,880</b>	<b>778,796</b>	<b>1,431,424</b>	<b>1,462,971</b>	<b>1,467,094</b>	<b>(4,123)</b>	<b>(35,671)</b>	<b>688,299</b>	<b>53%</b>	
<b>Operating Income</b>	<b>(112,457)</b>	<b>(110,666)</b>	<b>(105,763)</b>	<b>(714,193)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>714,193</b>		
<b>Fund Balance</b>												
Beginning Balance (Unaudited)					(0)	(0)	(2,946)					
Operating Income					-	-	-					
<b>Ending Fund Balance</b>					<b>(0)</b>	<b>(0)</b>	<b>(2,946)</b>					
Fund Balance as a % of Expenses					0%	0%	0%					

**CMO**  
**Income Statement**  
**As of Dec FY2025**

	Actual			YTD	Budget & Forecast						
	Oct	Nov	Dec	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs. Current Forecast	Approved Budget v1 vs. Current Forecast	Current Forecast Remaining	% Current Forecast Spent
<b>KEY ASSUMPTIONS</b>											
Enrollment Summary											
Total Enrolled					-	-	-	-	-		
ADA %											
Average ADA %											
ADA											
Total ADA					-	-	-	-	-		
<b>REVENUE</b>											
LCFF Entitlement											
SUBTOTAL - LCFF Entitlement	-	-	-	-	-	-	-	-	-	-	
Federal Revenue											
SUBTOTAL - Federal Revenue	-	-	-	-	-	-	-	-	-	-	
Other State Revenue											
SUBTOTAL - Other State Revenue	-	-	-	-	-	-	-	-	-	-	
Local Revenue											
8676 After School Program Revenue	12,893	13,474	12,117	64,553	130,000	130,000	130,000	-	-	65,447	50%
8699 All Other Local Revenue	50	-	0	50	-	-	-	-	-	(50)	
8721 CMO Fees Revenue	-	-	-	-	1,301,424	1,332,971	1,337,094	4,123	35,671	1,337,094	0%
SUBTOTAL - Local Revenue	12,943	13,474	12,117	64,603	1,431,424	1,462,971	1,467,094	4,123	35,671	1,402,491	4%
Fundraising and Grants											
SUBTOTAL - Fundraising and Grants	-	-	-	-	-	-	-	-	-	-	
<b>TOTAL REVENUE</b>	12,943	13,474	12,117	64,603	1,431,424	1,462,971	1,467,094	4,123	35,671	1,402,491	4%

**CMO**  
**Income Statement**  
**As of Dec FY2025**

	Actual			YTD	Budget & Forecast							
	Oct	Nov	Dec	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs.	Approved Budget v1 vs.	Current Forecast	% Current Forecast	
								Current Forecast	Current Forecast	Remaining	Spent	
<b>EXPENSES</b>												
<b>Compensation &amp; Benefits</b>												
<b>Certificated Salaries</b>												
1100	Teachers Salaries	-	-	850	850	-	-	-	-	-	(850)	
1101	Teacher - Stipends	-	-	1,700	2,950	13,130	13,130	13,130	-	-	10,180	22%
1148	Teacher - Special Ed	-	-	850	850	-	-	-	-	-	(850)	
1150	Teacher - Intervention	487	487	487	2,649	-	10,711	10,711	-	(10,711)	8,062	25%
1300	Certificated Supervisor & Administrator Salaries	15,399	15,399	15,399	99,784	186,169	186,169	186,169	-	-	86,385	54%
<b>SUBTOTAL - Certificated Salaries</b>		<b>15,886</b>	<b>15,886</b>	<b>19,286</b>	<b>107,082</b>	<b>199,299</b>	<b>210,009</b>	<b>210,009</b>	-	<b>(10,711)</b>	<b>102,927</b>	<b>51%</b>
<b>Classified Salaries</b>												
2400	Classified Clerical & Office Salaries	24,936	25,036	22,976	156,917	290,232	290,232	290,232	-	-	133,315	54%
2905	Other Classified - After School	26,114	28,970	28,528	175,007	258,385	258,385	258,385	-	-	83,377	68%
<b>SUBTOTAL - Classified Salaries</b>		<b>51,049</b>	<b>57,093</b>	<b>48,418</b>	<b>331,924</b>	<b>548,617</b>	<b>548,617</b>	<b>548,617</b>	-	-	<b>216,693</b>	<b>61%</b>
<b>Employee Benefits</b>												
3100	STRS	3,034	3,034	3,196	19,966	38,066	40,112	40,112	-	(2,046)	20,146	50%
3300	OASDI-Medicare-Alternative	4,224	4,545	3,919	26,935	44,859	45,014	45,014	-	(155)	18,079	60%
3400	Health & Welfare Benefits	4,326	5,808	4,782	28,340	68,498	68,498	68,498	-	-	40,159	41%
3500	Unemployment Insurance	81	83	58	836	6,517	6,545	6,545	-	(28)	5,710	13%
3600	Workers Comp Insurance	479	479	479	1,918	7,479	7,586	7,586	-	(107)	5,668	25%
3900	403b contribution	3,050	3,050	3,050	18,284	36,512	36,512	36,512	-	-	18,228	50%
<b>SUBTOTAL - Employee Benefits</b>		<b>15,195</b>	<b>17,001</b>	<b>15,484</b>	<b>96,278</b>	<b>201,931</b>	<b>204,267</b>	<b>204,267</b>	-	<b>(2,336)</b>	<b>107,989</b>	<b>47%</b>
<b>Books &amp; Supplies</b>												
4330	Office Supplies	125	-	252	754	2,081	2,081	2,081	-	-	1,327	36%
4352	After School Program	3,218	5,667	1,123	16,680	71,400	71,400	71,400	-	-	54,720	23%
4420	Computers: individual items less than \$5k	-	-	61	61	3,689	3,689	3,689	-	-	3,628	2%
4430	Non Classroom Related Furniture, Equipment & Supplies	198	-	116	780	7,650	7,650	5,000	2,650	2,650	4,220	16%
4710	Student Food Services	-	-	-	-	1,500	1,500	1,500	-	-	1,500	0%
4720	Other Food	106	292	1,756	4,180	11,220	11,220	10,000	1,220	1,220	5,820	42%
<b>SUBTOTAL - Books and Supplies</b>		<b>3,648</b>	<b>5,959</b>	<b>3,308</b>	<b>22,454</b>	<b>97,540</b>	<b>97,540</b>	<b>93,670</b>	<b>3,870</b>	<b>3,870</b>	<b>71,215</b>	<b>24%</b>

**CMO**  
**Income Statement**  
**As of Dec FY2025**

	Actual			YTD	Budget & Forecast							
	Oct	Nov	Dec	Actual YTD	Approved Budget v1	Previous Forecast	Current Forecast	Previous Forecast vs.	Approved Budget v1 vs.	Current Forecast	% Current Forecast	
								Current Forecast	Current Forecast	Remaining	Spent	
<b>Services &amp; Other Operating Expenses</b>												
5210 Conference Fees	-	-	-	11,420	743	12,000	12,000	-	(11,257)	580	95%	
5215 Travel - Mileage, Parking, Tolls	290	1,062	1,211	2,799	4,080	4,080	4,080	-	-	1,281	69%	
5220 Travel and Lodging	589	806	6,702	8,097	15,300	15,300	15,300	-	-	7,203	53%	
5225 Travel - Meals & Entertainment	298	24	934	1,256	3,060	3,060	3,060	-	-	1,804	41%	
5305 Dues & Membership - Professional	797	737	857	4,784	9,940	9,940	9,940	-	-	5,156	48%	
5400 Insurance	9,593	-	-	48,092	42,505	48,092	48,092	-	(5,587)	(0)	100%	
5515 Janitorial, Gardening Services & Supplies	150	150	200	1,066	3,334	3,334	3,334	-	-	2,268	32%	
5535 Utilities - All Utilities	142	38	157	2,009	3,150	3,150	3,150	-	-	1,141	64%	
5610 Rent	900	1,935	900	7,335	12,000	12,000	12,000	-	-	4,665	61%	
5615 Repairs and Maintenance - Building	-	-	-	-	651	651	651	-	-	651	0%	
5619 Non-Cash Lease Adjustment	-	-	-	-	(564)	(560)	(560)	-	(4)	(560)	0%	
5803 Accounting Fees	5,600	-	-	5,600	20,000	20,000	20,000	-	-	14,400	28%	
5809 Banking Fees	20	470	-	546	6,000	6,000	3,000	3,000	3,000	2,454	18%	
5812 Business Services	14,438	14,438	14,438	86,625	173,250	173,250	173,250	-	-	86,625	50%	
5820 Non-Instructional Consultants	-	-	297	1,129	5,025	5,025	3,086	1,940	1,940	1,957	37%	
5830 Field Trips Expenses	-	-	276	1,792	-	1,515	6,515	(5,000)	(6,515)	4,724	27%	
5836 Fingerprinting	-	-	-	-	108	108	108	-	-	108	0%	
5845 Legal Fees	-	7,124	2,470	15,001	9,364	9,364	20,000	(10,636)	(10,636)	4,999	75%	
5848 Licenses and Other Fees	-	-	-	20	26	26	26	-	-	6	77%	
5851 Marketing and Student Recruiting	-	277	24	445	945	945	945	-	-	499	47%	
5857 Payroll Fees	150	201	166	10,922	11,634	11,634	15,953	(4,319)	(4,319)	5,031	68%	
5860 Printing and Reproduction	460	705	222	2,067	3,150	3,150	3,150	-	-	1,083	66%	
5861 Prior Yr Exp (not accrued)	-	-	-	8	789	789	789	-	-	780	1%	
5863 Professional Development	-	-	1,322	1,565	23,779	23,779	18,000	5,779	5,779	16,435	9%	
5875 Staff Recruiting	300	-	252	552	3,243	3,243	2,000	1,243	1,243	1,448	28%	
5877 Student Activities	-	-	-	-	917	917	917	-	-	917	0%	
5893 Transportation - Student	-	-	-	136	-	136	136	-	(136)	-	100%	
5910 Communications - Internet / Website Fees	5,471	195	195	6,250	28,397	28,397	28,397	-	-	22,147	22%	
5915 Postage and Delivery	33	6	729	1,012	2,550	2,550	2,550	-	-	1,538	40%	
5920 Communications - Telephone & Fax	33	33	33	171	663	663	663	-	-	492	26%	
<b>SUBTOTAL - Services &amp; Other Operating Exp.</b>	<b>39,263</b>	<b>28,201</b>	<b>31,385</b>	<b>220,698</b>	<b>384,038</b>	<b>402,538</b>	<b>410,532</b>	<b>(7,993)</b>	<b>(26,494)</b>	<b>189,834</b>	<b>54%</b>	
<b>Capital Outlay &amp; Depreciation</b>												
<b>SUBTOTAL - Capital Outlay &amp; Depreciation</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>		
<b>Other Outflows &amp; Amortization</b>												
7999 Uncategorized Expense	360	-	-	360	-	-	-	-	-	(360)		
<b>SUBTOTAL - Other Outflows &amp; Amortization</b>	<b>360</b>	<b>-</b>	<b>-</b>	<b>360</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(360)</b>		
<b>TOTAL EXPENSES</b>	<b>125,400</b>	<b>124,139</b>	<b>117,880</b>	<b>778,796</b>	<b>1,431,424</b>	<b>1,462,971</b>	<b>1,467,094</b>	<b>(4,123)</b>	<b>(35,671)</b>	<b>688,299</b>	<b>53%</b>	

**The Academies CMO**  
**Monthly Cash Forecast**  
**As of Dec FY2025**

	2024-25												Forecast	Remaining Balance
	Actuals & Forecast													
	Jul Actuals	Aug Actuals	Sep Actuals	Oct Actuals	Nov Actuals	Dec Actuals	Jan Forecast	Feb Forecast	Mar Forecast	Apr Forecast	May Forecast	Jun Forecast		
<b>Beginning Cash</b>	<b>4,877,274</b>	<b>4,842,885</b>	<b>4,794,597</b>	<b>4,275,930</b>	<b>4,766,518</b>	<b>4,729,118</b>	<b>4,642,490</b>	<b>5,105,992</b>	<b>5,018,476</b>	<b>4,946,077</b>	<b>5,108,994</b>	<b>5,167,258</b>		
<b>REVENUE</b>														
LCFF Entitlement	-	337,730	429,880	989,299	730,780	607,913	988,586	730,780	828,756	1,019,245	825,176	825,176	9,387,519	1,074,199
Federal Revenue	-	-	-	-	9,099	23,166	28,925	33,051	-	1,670	42,346	229,732	456,324	88,337
Other State Revenue	-	29,740	29,746	124,380	53,531	134,583	124,976	132,925	82,810	84,543	163,205	120,502	1,597,937	516,995
Other Local Revenue	46,257	46,922	13,608	16,195	17,037	12,200	(72,152)	11,772	11,772	11,772	11,772	1,480,490	1,607,646	-
Fundraising & Grants	841	3,148	4,520	1,431	2,500	4,473	(652)	(652)	(652)	(652)	(652)	(652)	13,000	-
<b>TOTAL REVENUE</b>	<b>47,098</b>	<b>417,539</b>	<b>477,754</b>	<b>1,131,306</b>	<b>812,948</b>	<b>782,336</b>	<b>1,069,683</b>	<b>907,875</b>	<b>922,687</b>	<b>1,116,577</b>	<b>1,041,846</b>	<b>2,655,248</b>	<b>13,062,427</b>	<b>1,679,531</b>
<b>EXPENSES</b>														
Certificated Salaries	96,527	464,026	604,194	448,001	435,943	449,361	272,308	459,642	459,642	452,647	459,642	514,989	5,116,923	-
Classified Salaries	80,335	128,286	249,745	179,093	211,007	151,501	102,898	182,555	182,555	160,886	182,555	160,886	1,972,301	-
Employee Benefits	99,562	173,147	174,503	167,196	177,677	161,941	194,878	179,687	179,687	173,477	176,939	185,689	2,044,382	-
Books & Supplies	39,759	49,361	18,952	16,651	14,118	9,146	61,315	55,006	54,701	54,813	52,609	62,470	490,402	1,500
Services & Other Operating Expenses	105,392	47,650	96,321	105,976	105,906	73,869	161,738	136,305	136,305	129,640	129,640	1,887,458	3,240,048	123,848
Capital Outlay & Depreciation	-	-	-	-	-	10,168	4,852	1,695	1,695	1,695	1,695	(1,462)	20,336	-
Other Outflows	-	-	-	571	-	-	(571)	-	-	-	-	-	-	-
<b>TOTAL EXPENSES</b>	<b>421,575</b>	<b>862,470</b>	<b>1,143,715</b>	<b>917,489</b>	<b>944,650</b>	<b>855,986</b>	<b>797,417</b>	<b>1,014,889</b>	<b>1,014,584</b>	<b>973,158</b>	<b>1,003,080</b>	<b>2,810,031</b>	<b>12,884,392</b>	<b>125,348</b>
<b>Operating Cash Inflow (Outflow)</b>	<b>(374,477)</b>	<b>(444,931)</b>	<b>(665,962)</b>	<b>213,817</b>	<b>(131,703)</b>	<b>(73,650)</b>	<b>272,266</b>	<b>(107,014)</b>	<b>(91,897)</b>	<b>143,419</b>	<b>38,767</b>	<b>(154,783)</b>	<b>178,035</b>	<b>1,554,183</b>
Accounts Receivable	1,707,487	361,498	160,247	277,880	49,434	(150,000)	32,418	767	767	767	767	(17,970)	-	-
Other Current Assets	44,128	-	-	-	-	-	-	-	-	-	-	-	-	-
Fixed Assets	-	-	-	-	-	10,168	4,852	1,695	1,695	1,695	1,695	(1,462)	-	-
ROU Assets	-	-	-	-	-	-	-	-	-	-	-	216,356	-	-
Accounts Payable	(1,073,061)	18,791	(18,791)	13,713	18,746	(25,196)	612,869	218	218	218	218	218	-	-
Other Current Liabilities	(92,666)	(10,693)	(19,026)	(38,455)	1,605	127,074	(475,721)	-	-	-	-	(62,551)	-	-
Summer Holdback	(245,800)	27,048	24,865	23,633	24,518	24,975	16,818	16,818	16,818	16,818	16,818	16,818	-	-
ROU Current Liabilities	-	-	-	-	-	-	-	-	-	-	-	(11,567)	-	-
ROU Long-Term Liabilities	-	-	-	-	-	-	-	-	-	-	-	(235,635)	-	-
<b>Ending Cash</b>	<b>4,842,885</b>	<b>4,794,597</b>	<b>4,275,930</b>	<b>4,766,518</b>	<b>4,729,118</b>	<b>4,642,490</b>	<b>5,105,992</b>	<b>5,018,476</b>	<b>4,946,077</b>	<b>5,108,994</b>	<b>5,167,258</b>	<b>4,916,682</b>		

**The Academies CMO**  
**Balance Sheet**  
**As of Dec FY2025**

	Jun FY24				Dec FY25				Projected Jun FY25			
	SVA	BOA	CMO	Total	SVA	BOA	CMO	Total	SVA	BOA	CMO	Total
<b>ASSETS</b>												
Cash Balance	2,551,739	2,247,869	77,667	4,877,274	2,871,156	2,456,821	(685,487)	4,642,490	2,407,568	2,461,598	47,516	4,916,682
Accounts Receivable	1,553,198	1,053,219	-	2,606,417	45,014	154,796	61	199,870	1,063,248	798,637	0	1,861,886
Other Current Assets	21,505	21,189	1,435	44,128	-	-	-	-	-	-	-	-
Fixed Assets	173,654	30,270	-	203,924	164,549	29,207	-	193,756	161,757	21,831	-	183,588
Other Assets	-	-	1,000	1,000	-	-	1,000	1,000	-	-	1,000	1,000
ROU Assets	4,800,180	5,099,513	19,482	9,919,175	4,800,180	5,099,513	19,482	9,919,175	4,697,426	4,996,918	8,475	9,702,819
<b>TOTAL ASSETS</b>	<b>9,100,276</b>	<b>8,452,059</b>	<b>99,584</b>	<b>17,651,918</b>	<b>7,880,899</b>	<b>7,740,337</b>	<b>(664,944)</b>	<b>14,956,291</b>	<b>8,329,999</b>	<b>8,278,984</b>	<b>56,991</b>	<b>16,665,975</b>
<b>LIABILITIES &amp; EQUITY</b>												
Accounts Payable	721,854	276,962	52,351	1,051,166	3,828	(20,334)	1,875	(14,632)	351,247	322,851	50,576	724,674
Other Current Liabilities	306,603	234,461	29,369	570,433	274,992	233,548	29,732	538,272	-1.85E-13	-	-	(0)
Summer Holdback	143,546	103,500	349	247,394	80,285	46,221	126	126,632	134,179	92,898	466	227,543
Loans Payable (Current)	110,128	126,471	11,567	248,166	110,128	126,471	11,567	248,166	-	-	-	-
ROU Current Liabilities	-	-	-	-	-	-	-	-	110,128	126,471	-	236,599
Deferred Revenue	677,620	540,241	-	1,217,860	677,620	540,241	-	1,217,860	677,620	540,241	-	1,217,860
ROU Long-Term Liabilities	4,869,533	5,641,569	8,895	10,519,997	4,869,533	5,641,569	8,895	10,519,997	4,760,369	5,515,098	8,895	10,284,362
Beginning Net Assets	2,180,273	1,096,452	(0)	3,276,724	2,270,992	1,528,856	(2,946)	3,796,902	2,270,992	1,528,856	(2,946)	3,796,902
Net Income (Loss) to Date	90,719	432,404	(2,946)	520,177	(406,478)	(356,235)	(714,193)	(1,476,905)	25,465	152,570	-	178,035
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>9,100,276</b>	<b>8,452,059</b>	<b>99,584</b>	<b>17,651,918</b>	<b>7,880,899</b>	<b>7,740,337</b>	<b>(664,944)</b>	<b>14,956,291</b>	<b>8,329,999</b>	<b>8,278,984</b>	<b>56,991</b>	<b>16,665,975</b>





Proposal for  
The Academies CMO  
Visalia, California

For the fiscal year ending June 30, 2025,  
plus optional renewals through June 30, 2027

***Submitted on January 15, 2025:***

By: Marcy Kearney, CPA  
619-270-8222  
mkearney@christywhite.com

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**APPENDIX:**

QUALITY CONTROL PEER REVIEW OPINION

January 15, 2025

Board of Directors  
The Academies CMO  
Visalia, California

Dear Members of the Board,

Christy White, Inc. (CW) is pleased to respond to The Academies CMO's request for Annual Financial Statement Audits for the fiscal year ending June 30, 2025 (plus the two optional renewal periods through 2027).

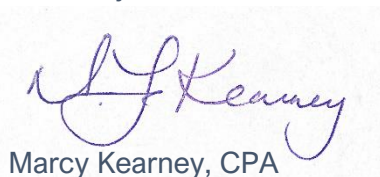
We **specialize in auditing California charter schools**, including High Tech High (16 charter schools), Da Vinci Schools (5 charter schools), and Excelsior Charter School (over 1,800 pupils). In 2023-24, we were providing services to over 150 nonprofit organizations with charter schools and 220+ school districts. We also perform school facility program (SFP) and general obligation bond audits, plus, should the need arise, we have certified fraud examiners on our team to perform forensic audits.

**CW will continue to serve The Academies CMO with our audit team of charter school nonprofit specialists.** For over 20 years, our firm has specialized in charter school audits, so you get the benefits of not only an experienced specialized team but an entire firm of more than 60 professionals. As a leader in the K-12 education industry, we provide educational organization audit focused staff training unmatched by other firms. We assure you that every Christy White team member will be trained to handle your audit efficiently and effectively. Moreover, we provide **free training and accounting advice** to our clients.

I, Marcy Kearney, CPA and founding partner, Christy White, have over 50 combined years of local education agency (LEA) audit and consulting experience. We are joined by Partners Heather Daud Rubio, Michael Ash, John Whitehouse, and Kyle Montgomery, plus several experienced auditors and staff. My partners and I have a great deal of interest and **commitment to providing excellent auditing services to The Academies CMO**. Our team is committed to meeting all requirements and timelines for the successful completion of the engagement.

After reading through our proposal, should you have any questions, please feel free to contact me by phone at (619) 270-8222 or via email at [mkearney@christywhite.com](mailto:mkearney@christywhite.com). I would be happy to meet with you!

Sincerely,



Marcy Kearney, CPA  
Partner

## EXECUTIVE SUMMARY

Christy White, Inc. (CW), a professional accountancy corporation, is the largest CPA firm in the number of Local Educational Agencies (LEAs) audited annually. Home-based in San Diego with professional staff that resides across the State to best serve our clients. Marcy Kearney, CPA, and Christy White Brook, CPA, CFE, will lead the proposed auditing services that include an audit of the annual financial statements and compliance for The Academies CMO for the fiscal year ending June 30, 2025, plus two optional renewal years.

When considering whether to hire our firm, you will find that CW can be differentiated from our competitors in several areas, such as:

- **EXPERIENCED AND INVOLVED PARTNERS AND MANAGERS:** Christy White Brook, CPA, CFE, President and Partner, has 38 years of audit and consulting experience garnered from 30 years in public accounting and 7 years with School Services of California, Inc. Marcy Kearney, CPA, Audit Partner of the charter school division and tax department, has over 15 years of experience working directly with independent charter schools, other nonprofit organizations, and school districts. You can expect that Ms. White Brook and Ms. Kearney will be accessible to The Academies CMO when the audit is underway and lend their expertise freely on accounting and internal control issues.
- **TIMELY AUDITS:** CW is committed to meeting all audit deadlines. All of our audits have been performed according to agreed-upon audit schedules, with the final reports to the State of California filed on time.
- **SECURE REMOTE AUDIT TECHNOLOGY:** Our firm implemented a "virtual office" setting several years preceding the pandemic. With our technology, we are fully capable of conducting a secure remote audit by providing audit-related items via our client-secured online portal (Suralink). Your CW audit manager will help set up you and your staff. The portal is very user-friendly.
- **COMMITMENT TO QUALITY:** CW has received an "unqualified" audit opinion by our peer reviewers regarding our firm's Quality Control Standards. All audits submitted to the State have been approved. Current client references are available upon request.
- **SMOOTH AUDIT PROCESS:** CW specializes in governmental and not-for-profit entities, so the process for the audit will be smooth. CW guarantees that: (1) trained and supervised staff will be on-site; (2) clients will be given a detailed audit plan; (3) CW will be considerate of your staff and their workload; and (4) all audit findings will be discussed before the report is finalized.
- **FINDING SOLUTIONS:** CW is not content to simply identify problem areas that may exist in your Organization but seeks ways to help provide solutions. Any CPA firm can discover a problem, but with our combined backgrounds and experiences, we can supply our clients with a wide range of possible solutions.

The following proposal provides more specific information on the scope of the audit services, our experience, qualifications, client references, and audit approach. We hope that you select our audit firm.

## GENERAL INFORMATION – ABOUT CW

### LEGAL NAME AND CORPORATE CONTACT INFORMATION

Legal Name: Christy White, A Professional Accountancy Corporation (dba Christy White, Inc.)  
 Corporate Address: 348 Olive Street, San Diego, CA 92103  
 Telephone Number: 619-270-8222  
 Fax Number: 619-260-9085  
 Email Address: [cwhite@christywhite.com](mailto:cwhite@christywhite.com)  
 Website: [www.christywhite.com](http://www.christywhite.com)

### FIRM HISTORY, SERVICES, AND SIZE

Christy White, Inc. was incorporated in 2010, succeeding Nigro Nigro & White (NNW) as the AICPA designated successor firm (Christy White was a founding partner NNW in 1999). Our firm has grown steadily over the past 24 years and now has 30 professionals, including seven CPAs.

We offer services exclusively to local educational agencies (LEAs), including school districts and charter schools. It's our full specialization in LEAs that makes us unique among CPA firms and provides added value to our clients. As your educational audit specialist, CW audits over 220 school districts, 15 county offices of education, 120+ Proposition 39 bonds, well over 100 State School Facilities Grant audits, and over 165 charter schools. Our audit clients range in size from large charter schools to mid-size and small entities. We also prepare the annual tax Forms 990/199 for our nonprofit charter school clients. Our consulting capabilities include helping our clients with:

ASB Training	Forensic/Fraud Audits
Attendance Accounting	Business Functions Organization
FASB and Compliance Implementation	Charter School Back Office
Efficiency Studies	Financial Reporting

### FIRM LICENSE, AFFILIATIONS AND ASSOCIATIONS

Christy White, Inc. (CW) is incorporated in the State of California. CW is licensed by the State Board of Accountancy. We are a majority women-owned firm. The California State Controller's Office CPA Directory lists Christy White as an eligible CPA firm that conducts LEA audits.

CW is a member of the Private Companies Practice Section (PCPS) and Government Audit Quality Center (GAQC) of the American Institute of CPAs, which requires an independent peer review every three years. We are members of the American Institute of CPAs (AICPA) and the California Society of CPAs. We are also associate members with the California Charter School Association (CCSA), the California Association of School Business Officials (CASBO), the Government Finance Officers' Association (GFOA), and the Association of Certified Fraud Examiners.

CW is also an active participant with the Education Audit Appeals Panel in developing the annual K-12 audit guide and dialogues regularly with State agencies on audit issues that affect our charter school clients.

## GENERAL INFORMATION – ABOUT CW (CONT.)

### FIRM INDEPENDENCE

One of the benefits of an audit is having an "independent" assessment of your internal controls over financial statements and compliance matters. Our quality control program ensures that we adhere to auditor independence's strictest standards, including those required by the Standards for Audit of Governmental Organization, Programs, Activities and Functions, published by the United States, General Accounting Office. We ensure that all firm partners and any staff working on the engagement do not have any financial or other interests in your Organization other than a strictly professional one. Our continued success as your business partner depends upon our independence.

CW does not hold any business relationship with The Academies CMO nor personal relationships with any members of the board or management. Should a professional relationship occur that presents an independence conflict during the contract period, CW would immediately notify The Academies CMO.

### RESPONSIBLE BUSINESS PRACTICES

Christy White, Inc. is financially stable. We have no long-term debt and have remained fiscally stable throughout our 24-year history. We will not joint venture with another firm on this engagement.

CW has a standing record of performing quality audits. Our clients and the State Controller's Office have accepted all of our audit reports. No client has terminated a contract during the performance of the audit. Additionally, we have not been involved in litigation or any investigation by a state, federal, or professional agency.

There have been no complaints levied by the State Board of Accountancy or other regulatory authority in the history of CW or its predecessor firm of Nigro Nigro & White, PC. None of the CPAs of CW have had any individual complaints or sanctions.

### CW'S QUALITY CONTROL SYSTEM

Our quality control systems include policies and procedures in leadership, ethical requirements, acceptance of new clients, personnel management, engagement performance, monitoring, and communication. We actively monitor compliance with our quality control document by reviewing work papers, training on new standards, consultation on complex areas, and sound human resources practices. CW has received the highest level of assurance from our peer reviewer, which is "Pass." Attached is our most recent quality control report.

### INDEMNITY

CW has errors and omissions insurance and will indemnify and hold harmless the Organization from and against all losses and claims in the execution of our work or the consequences of any negligence or carelessness on our part. We are also fully insured for workers' compensation. Our current policies are attached.

## AUDIT STAFFING AND PERSONNEL

### STAFF QUALIFICATIONS

The firm partners and staff of Christy White, Inc. (CW) bring an extensive background of audit and consulting experience to CW clients. We have audited local educational agencies (LEAs) throughout California. We are familiar with the unique issues relative to charter school finance: budgetary constraints, construction accounting, new federal and state program compliance, attendance accounting, state funding models, cash flow management, and more. The audit team will include:

Christy White, Inc. Personnel Assigned	
Name	Classification
Marcy Kearney, CPA	Signing Partner
Christy White Brook, CPA, CFE	Assisting Partner
Vanessa Pineda	In-Charge Auditor

### ABBREVIATED RESUMES OF CHRISTY WHITE, INC.'S ASSIGNED AUDIT TEAM

Biographies of all staff members assigned to your audit are shown below.



**Audit Partner Marcy Kearney, CPA**, is a licensed CPA in California with over fifteen years of experience, individually working with public school districts, independent charter schools, and not-for-profit entities for both audit and tax preparation. She manages the tax department and the charter school division of the audit department. Additionally, Marcy has been a long-time member of the California Society of CPAs (CalCPA) and is a member of the American Institute of CPAs (AICPA). Marcy holds a Bachelor of Science degree in Business Administration with an emphasis in Accountancy from Cal State University, San Marcos. To better serve our CW clients and staff, Marcy moved to L.A. in 2014.



**President Christy White Brook, CPA, CFE**, has served hundreds of school districts and charter schools as an auditor, school finance consultant, professional author, and trainer. Christy provides audit and financial consulting in organizational structure, internal controls, school district reorganization, attendance accounting, forensic and fraud audits, and developing and conducting six workshop series throughout the State. Christy received a Best Volunteer Trainer award from the California Society of CPA's Education Foundation. And she is a Certified Fraud Examiner (CFE) in addition to her CPA license.



**Director Vanessa Pineda**, a Los Angeles native, helps head up the Los Angeles office of Christy White. She has over ten years of experience in K-12 audits, including school districts, charter schools, county offices of education, Proposition 39 bonds and school facility program audits. Vanessa is a popular workshop leader in our firm, known for her approachable style and practical knowledge. She conducts workshops and in-service training on Attendance and Student Body Fund Accounting. Vanessa holds a degree in Business Administration, with an option in Accounting, from California State University, Los Angeles.

## AUDIT STAFFING AND PERSONNEL (CONT.)

### STAFF TRAINING PROGRAMS

CW's program of staff development includes two full weeks of focused in-house training in the audit of charter schools and school districts. We also provide opportunities to staff to attend professional training provided by outside providers, such as School Services of California, the California Society of CPAs, and CCSA. A sampling of training programs our staff has attended within the last year include:

Continuing Education Event	Training Provider Organization
Annual California Charter School Conference	California Charter School Association (CCSA)
Annual California Charter School Conference	Charter Schools Development Center (CSDC)
Annual CASBO Conference, Attendance Accounting	California Association of School Business Officials (CASBO)
January, May, and Summer State Budget Workshops	School Services of California, Inc.
School Districts Conference, Not-for-Profit Organizations Conference	California Society of CPAs (CalCPA)
Annual Global Fraud Conference	Association of Certified Fraud Examiners (ACFE)
Single Audit Updates	American Institute of CPAs (AICPA)

### STAFF CAPACITY

CW has a corporate office located in San Diego and numerous remote offices throughout California. We have over 60 professional employees, including ten certified public accountants, and sufficient audit capacity to provide excellent audit services to The Academies CMO

### EQUAL OPPORTUNITY EMPLOYER

CW is an equal opportunity employer. We do not discriminate based on race, ethnicity, age, or religion. We are in compliance with all applicable federal and state laws and regulations relating to equal opportunity employment, including the Civil Rights Act of 1964, the State Fair Employment Practice Act, and all other applicable Federal and State laws and regulations relating to equal opportunity employment, including Executive Order No. 11246 of September 24, 1965.



## PAST PERFORMANCE

### SPECIALIZING IN K-12 AUDITS

CW devotes our practice exclusively to K-12 auditing and consulting, including charter schools, schools districts and county offices. A full list of all charter schools served is included on the following page and below is a list of all charter schools operating two or more public charter schools. **References can be provided upon request.**

### LIST OF NON-PROFIT ORGANIZATIONS WITH TWO OR MORE CHARTER SCHOOLS

In addition to the charter schools listed below, we also audit several school districts throughout the State.

Charter School Non-Profit	County	Years Audited
Achieve Charter Schools (2 schools)	Butte	2023-24 through present
Da Vinci Schools (4 schools)	Los Angeles	2008-09 through present
EJE Academies (2 schools)	San Diego	2006-07 through present
Escuela Popular del Pueblo (2 schools)	Santa Clara	2023-24 through present
Fenton Charter Public Schools (5 schools)	Los Angeles	2019-20 through present
Griffin Technology Academies (4 schools)	Solano	2020-21 through present
High Tech High (16 schools)	San Diego	2008-09 through present
High Tech Los Angeles (2 schools)	Los Angeles	2019-20 through present
Ingenium Charter Schools (4 schools)	Los Angeles	2022-23 through present
Lashon Academy (2 schools)	Los Angeles	2022-23 through present
Leadership Public Schools (3 schools)	Alameda/Contra Costa	2020-21 through present
NEW Academy Charter Schools (2 schools)	Los Angeles	2022-23 through present
New Los Angeles Charter Schools (2 schools)	Los Angeles	2022-23 through present
Odyssey Charter Schools (2 schools)	Los Angeles	2022-23 through present
Orange County Academy of Sciences and Arts (2 schools)	Orange	2018-19 through present
Oxford Preparatory Academy (3 schools)	Orange	2016-17 through present
River Island Academies	San Joaquin	2023-24 through present
The Academy of Alameda (2 schools)	Alameda	2022-23 through present
The Accelerated Schools (3 schools)	Los Angeles	2022-23 through present
The Foundation for Hispanic Education (3 schools)	Santa Clara	2022-23 through present
Unity Schools (2 schools)	Alameda	2022-23 through present

## PAST PERFORMANCE (CONT.)

### FULL LIST OF CURRENT CA CHARTER SCHOOL AUDIT CLIENTS OPERATED BY NONPROFIT ORGANIZATIONS

Charter School Non-Profit	Charter School Non-Profit
ABLE Charter Schools	Leadership Military Academy
Academia Avance Charter School	Leadership Public Schools (3 schools)
Achieve Charter Schools (2 schools)	Learning by Design Charter School
AeroSTEM Academy	Learning for Life Charter School
Agnes J. Johnson Charter School	Lennox Math, Science & Technology Academy
Alma Fuerte Public Charter School	Literacy First Charter School
Almond Acres Charter Academy	Los Angeles Academy of Arts & Enterprise
Aurum Preparatory Academy	Los Angeles College Prep Academy
B.E.S.T Academy	Monarch River Academy
Bay Area Technology Charter School	Nevada City School of the Arts
Bitney Prep High Charter School	North County Trade Tech High School
Bullis Charter School	North Oakland Community Charter School
Capitol Collegiate Academy	New Heights Charter School
Chico Country Day School	New Hope Charter School
Clarksville Charter School	NEW Academy Charter Schools (2 schools)
Clear Passage Educational Center	New Los Angeles Charter Schools (2 schools)
Clovis Global Academy	New School of San Francisco
Collegiate Charter High School of Los Angeles	Oasis Charter Public School
College Preparatory Middle School	Odyssey Charter Schools (2 schools)
Compass Charter Schools (3 schools)	Orange County Academy of Sciences and Arts (2 schools)
CORE Butte Charter School	Orange County Educational Arts Academy
CORE Charter School	Oxford Preparatory Academy (2 schools)
Crete Academy	Pacific Community Charter School
Da Vinci RISE High	Palisades Charter High School
Da Vinci Schools (4 schools)	PazLo Education Foundation
Discovery Charter Schools (2 schools)	Plumas Charter School
Dual Language Immersion North County	Provisional Accelerated Learning Academy
EJE Academies (2 schools)	REACH Leadership Academy
El Camino Real Charter High School	Renaissance Arts Academy
El Concilio CA Academies dba Astronaut J. Hernandez Academy	Rising Sun Montessori
Elevate Elementary School	Samueli Academy
Encore Jr./Sr. High School for the Arts	San Carlos Charter Learning Center
Escuela Popular Del Pueblo (2 schools)	San Diego Global Vision Academy
Excelsior Charter School	Santiago Middle School
Excelsior Charter School Corona-Norco	School for Entrepreneurship & Technology
Feather River Charter School	Sierra Expeditionary Learning School
Fenton Charter Public Schools (5 schools)	Shanél Valley Academy
Forest Charter School	Sparrow Academy
Goethe International Charter School	Suncoast Preparatory Academy
Golden Charter Academy	Sycamore Creek Community Charter School
Golden Eagle Charter School	Taylion High Desert Academy/Adelanto
Granite Mountain Charter School	The Academy of Alameda (2 schools)
Griffin Technology Academies (4 schools)	The Accelerated Schools (3 schools)
Hawkings STEAM Charter School	The Foundation for Hispanic Education (3 schools)
High Tech High (16 schools)	Three Rivers Charter School
High Tech Los Angeles (2 schools)	Tree of Life Charter School
Howard Gardner Community Charter	Twin Ridges Home Study Charter School
Ingenium Charter Schools (4 schools)	Twin Rivers Charter School
International School of Monterey	University Preparation School at CSU Channel Islands
Irvine International Academy	Urban Discovery Academy
John Muir Charter School	Village Charter Academy
Kidinnu Academy	Village Charter School
Kinetic Academy	We the People Public Schools
Lake County International Charter School	Wildflower Open Classroom
Lake View Charter School	Yu Ming Charter School
Lashon Academy (2 schools)	Yuba River Charter School

## CAPACITY AND METHODOLOGY

### SCOPE OF THE AUDIT

The scope of auditing services provided includes the **Annual Financial Statements** of The Academies CMO (the nonprofit organization), including its two public charter schools, Sycamore Valley Academy and Blue Oak Academy, and Compliance with State Audit and Federal Requirements for the fiscal year ending June 30, 2025, with options to extend through 2027.

The purpose of the financial audits is to render the following opinions and reports:

- Auditor's Opinion on the Financial Statements
- Auditor's Opinion on Internal Controls and Compliance required by *Governmental Auditing Standards*
- Auditor's Opinion on State Compliance Requirements
- Current Year Findings and Recommendations
- Status Report on Prior-Year's Findings and Recommendations

Also, we will conduct the audit to meet procedures required of:

- Federal OMB Uniform Guidance and the Compliance Supplements, when applicable
- Other guides as required by the federal and State agencies, when applicable

### RISK ASSESSMENT

CW has long taken a risk-based audit approach in our audits of LEAs for audit effectiveness and efficiency. We will perform our **Audit Risk Assessment** to include, at a minimum:

- Overall Internal control structure; precisely controls over electronic data processing systems, cash collections, cash disbursements, maintenance and operations and segregation of duties
- Compliance with Education Code and federal and state laws and regulations
- Capitalization and depreciation of assets

### DOCUMENTATION OF INTERNAL CONTROL STRUCTURES

For each engagement performed, we conduct a thorough **Understanding of Internal Control Systems**, assess control risk, and suggest improvements to our clients. CW is well versed in the Risk-based Assessment Standards and will incorporate these requirements into our audit programs. Areas of **Internal Control** typically evaluated for our charter school clients include:

- |   |  |
|---|--|
| ➤ Cash receipting and cash management                       | ➤ Inventory and fixed assets             |
| ➤ Purchasing and accounts payable                           | ➤ Attendance and compliance reporting    |
| ➤ Personnel requisition/terminations and payroll processing | ➤ Financial Reporting                    |
|   | ➤ Student body activities, if applicable |

Our examination of internal controls helps us plan our audit procedures. More importantly, we will communicate both positive control points and points where areas of improvement are needed.

## CAPACITY AND METHODOLOGY (CONT.)

### APPROACH TO FRAUD RISK AND TESTING

CW plans audit procedures to ensure that the financial statements and compliance areas are materially free of errors and irregularities (i.e., fraud). In doing this, we consider the audit risk of each significant transaction and group of transactions and design tests to ensure the transactions are free of material errors and irregularities. Our procedures meet the fraud risk and testing requirements of the clarified Statements on Auditing Standards (SAS). Suppose fraud is suspected or detected in the preparation of financial statements or the misappropriation of assets. In that case, CW will bring the matter to the attention of the appropriate level in the Organization. You can then take prompt action and prevent further instances from occurring as quickly as possible. We are also skilled in fraud investigations should the need arise.

### MANAGEMENT DISCUSSION AND LETTERS

Christy White, Inc. (CW) believes the purpose of a quality audit is to provide management with feedback on the internal control structure's effectiveness, including the data processing systems. We will report all reportable conditions and discuss potential audit findings, observed good fiscal practices, and then recommend ways to enhance the overall effectiveness and efficiency of the Organization as a whole. After thoroughly discussing each finding with management and incorporating the Organization's response, we will issue our final management letter. The audit findings will meet *Government Auditing Standards* and standards established by the State Controller's Office.

### PLANNING AND EXIT CONFERENCE MEETINGS

CW works closely with management at various stages during the audit cycle. We will organize both group and one-on-one meetings with school personnel and management, and a governing board representative.

- Audit Planning/Entrance Meeting: During our planning phase, we discuss our proposed audit timelines, deliverables and ask for input on areas deemed "new or high risk."
- Exit Conferences: After fieldwork, we will meet with you to discuss the results of our audit work and preliminary findings, if any. We do not want you to experience "audit surprises." Timely communication is the key to a surprise free audit.
- Review of Draft Audit Reports: Upon the audit's conclusion, we provide you with a draft report (which we are happy to review with you), our findings, and the charter management's response.

We are also available to meet with you on an ad hoc basis if an issue or question arises.

### GENERAL AUDITING APPROACH

By following the professional standards prescribed by ***Generally Accepted Auditing Standards (GAAS)*** and ***Government Auditing Standards***, we are confident that we are meeting our professional standards for the industry. We will conduct the audit to meet procedures required of:

- K-12 Audit Guide, as published by the State Controller's Office
- *Government Auditing Standards*, as published by the Federal Office of Management and Budget

Being a leading CPA firm in the LEA industry, we have experience working with State, and Federal agencies in the development of the K-12 audit guide, client resolution of findings, researching laws and regulations and aiding on sensitive client situations further elaborate on our **Audit Project Plan**, which includes the three stages of the audit process described on the following page.

## CAPACITY AND METHODOLOGY (CONT.)

### THREE STAGE AUDIT PLAN

Stage 1 – Planning and Risk Assessment

Stage 2 – Fieldwork: Internal Controls Evaluation, Compliance Testing, and Financial Statement Substantive Testing

Stage 3 – Drafting and Finalization of Financial Statements, Preparation of Forms 990/199

#### Stage 1 – Planning and Risk Assessment

We will confer with charter school personnel to discuss our plan to commence the audit. We hold an entrance conference call with representatives from the Board, Executive Director, Business/Finance office, and other department heads to discuss risk, concerns, expectations, and audit protocol. Our planning activities include:

- Reviewing and updating our understanding of the organization
- Identification of critical audit areas, plus changes to compliance areas
- Performing preliminary risk assessments
- Establishing an audit timeline
- Compiling data request lists
- Establishing agreed-upon deadlines

CW plans audit procedures to ensure that the financial statements and compliance areas are materially free of errors and irregularities (i.e., fraud). In doing this, we consider the audit risk of each significant account (e.g., cash, capital assets, accounts payable, and debt) and transaction group (e.g., payroll, cash disbursements, and cash receipts).

Upon assessing audit risk, we then design audit tests to meet the overall objective of the financial statements and compliance areas free of material errors and irregularities, under the clarified Statements on Auditing Standards (SAS).

#### Stage 2 – Fieldwork: Internal Controls Evaluation, Compliance Testing, and Financial Statement Substantive Testing

CW will gain an understanding of the internal control structure of the organization for financial accounting and compliance over federal and State programs. We also evaluate electronic data, including general and application controls over financial reporting and compliance with laws and regulations.

We develop our substantive testing by utilizing the results of our internal control testing and risk assessments. As in all stages of the audit, we will communicate with the Organization to permit timely resolution of any issues found. We will hold an exit conference with the Organization to summarize our fieldwork results and review significant findings.

#### Stage 3 – Drafting and Finalization of Financial Statements, Preparation of Forms 990/199

CW will draft the financial statements and provide the draft and any adjusting entries to the Organization for review and approval. Reports to management will include written reports, and discussions will be held with management and the Audit and Finance Committee or Governing Board. After the audit, we will prepare the Forms 990/199, should you contract for our tax services.

## CAPACITY AND METHODOLOGY (CONT.)

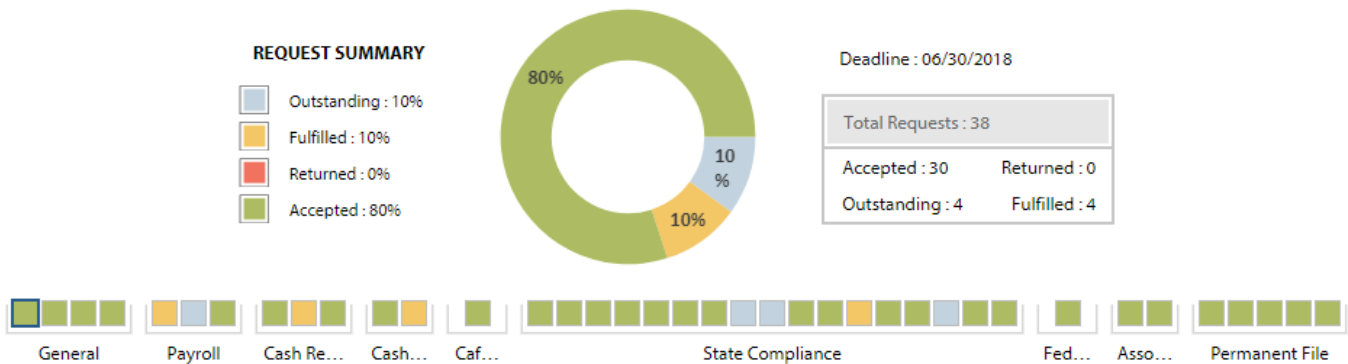
### LEVEL AND NATURE OF SUPPORT REQUIRED

We conduct our audit using a client-driven approach; either fully remote or a combination of off-site and on-site work. We are entirely paperless and have a client portal for ease of document transmission. As such, we can make sample selections in advance of our fieldwork and conduct specific audit tests right from our office. We ask that the accounting staff be generally available to answer questions, upload documentation, and scan sampled document support throughout the audit.

### SECURED PORTAL TO UPLOAD YOUR RECORDS WITH EASE

Christy White, Inc. uses a secure portal for seamless document-request coordination. Using the portal means all our requests are in one place, accessible by everyone assigned, and updated in real-time. Some of the key elements are summarized below:

- **Portal Dashboard:** The dashboard provides a real-time snapshot of the audit progress by indicating the number of outstanding, fulfilled, returned, and accepted items in a color-coded and easy to understand interface
- **Security:** Our portal boasts State of the art security in which all data is stored and transferred with AES 256-bit encryption, and servers are housed in SSAE16 Type II SOC1, SOC2 data centers with daily fail-safe backups
- **Drag and Drop Functionality:** To upload documents to the portal, drag and drop the file(s) from your computer to the requested item in the portal, at which time the status will be automatically changed from outstanding to fulfilled
- **Email Notifications:** Receive summary email notifications based on your timing preference (ex. daily, weekly, morning, afternoon, etc.), which provides activity updates for the engagement (ex. when files are uploaded/downloaded, or the status of an item has been changed)



## STATEMENT OF WORK

### PROPOSED TIMEFRAME

The following is an estimate of the audit and tax work to be conducted each month. The final schedule would be arranged based on the planning meeting that CW holds with you and your stakeholders.

Month	Proposed Work	Percentage of Work Done
March – June	Audit planning; the test of internal controls and state compliance with school site personnel	25%
June – August	Tests of internal controls, state compliance testing with business personnel	25%
Late August – November	Year-end fieldwork, depending on when books are closed	25%
October – early December	Reports drafted, reviewed, and finalized	20%
No later than December 15 <sup>th</sup>	Final audit reports distributed	5%
<b>Total</b>		<b>100%</b>

Before each phase of the audit, we will discuss the upcoming work with you, provide weekly progress reports, and conduct an exit conference. The exit conference will provide you with the preliminary results of the recent work, recommendations and list any outstanding audit items. Once the audit is completed, we will work on preparation of the tax returns (IRS Form 990/FTB Form 199), which will normally occur between January to May.

### ESTIMATED HOURS BY MAJOR WORK SEGMENT

We have reviewed the previous 2023-24 audit report to plan what we believe to be reasonable hours to complete the audit for the 2024-25 fiscal year.

<u>Audit Work Segments</u>	<u>Estimated Hours of Completion</u>	<u>Audit Work Segments</u>	<u>Estimated Hours of Completion</u>
<b>Planning, Supervision/Review</b>		<b>State Compliance Testing</b>	
Planning and Risk Assessment	6	Attendance	10
Supervision and Quality Control Review	8	Unduplicated LCFF Pupil Count	6
Contingencies/Subsequent Events	2	All Other Areas	12
Board Minutes	2	<b>Substantive Testing Areas</b>	
Correspondence (including Confirmations)	2	Assets (Cash, Receivables, etc.)	9
Entrance/Exit Conference	2	Liabilities (Accounts Payable, Loans, etc.)	10
<b>Internal Control Review/Transaction Testing</b>		Net Assets	4
Interviews and Risk Assessment	2	Revenues	10
Cash Disbursements & Payroll	10	Expenses	8
Cash Receipts	6	<b>Report Preparation and Review</b>	
Journal Entries	2	Audit Reports Review and Opinions	20
		Management Letters/Secretarial	4
		<b>Total Audit Hours</b>	<b>135</b>

Cont'd next col.



## PROPOSED FEES

### FEE STRUCTURE FOR THE ACADEMIES CMO

The proposed fees are all-inclusive and will not change unless there are significant changes in the scope of the audit or tax services proposed, as imposed by state or federal agencies or directly requested by the Organization. Audit fees increase per year at a rate of six percent for Cost of Living Adjustment (COLA). We do not bill for advisory services related to the audit or an application of accounting standards. We encourage our clients to contact us at any time year-round for free advice on general finance and accounting issues.

We propose to conduct the audit engagement and submit the audit reports in compliance with the instructions provided by the State Controller's Office. The fee schedule below includes a list of personnel by classification assigned to the audits, indicating the estimated number of hours and rate per hour for the audits.

<u>Classification</u>	<u>Billing Rates</u>	<u>Estimated Hours</u>	<u>2024-25</u>	<u>2025-26</u>	<u>2026-27</u>
Partner	\$ 295	10	\$ 2,950	\$ 3,186	\$ 3,440
Director	225	20	4,500	4,860	5,249
Senior	165	30	4,950	5,346	5,774
Senior/Staff	150	65	9,750	10,530	11,372
Paraprofessional	90	10	900	973	1,050
		<u>135</u>			
<b>Total Audit Fees*</b>			<b>\$ 23,050</b>	<b>\$ 24,895</b>	<b>\$ 26,885</b>
<b>Tax Preparation Fees**</b>			2,500	2,500	2,500
<b>Total Professional Fees</b>			<b>\$ 25,550</b>	<b>\$ 27,395</b>	<b>\$ 29,385</b>

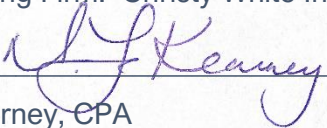
\*If a Federal Single Audit under OMB Uniform Guidance (UG) becomes applicable during any given year, an additional \$5,000 will be added to the annual audit fee. A Federal Single Audit under OMB UG is applicable in any given year that the Organization expends more than \$750,000 in Federal funds.

\*\*Fees noted for preparation of tax returns include Federal IRS Form 990 and related schedules, California Form 199. If these are not the appropriate forms or if any additional Federal or State forms are necessary, this fee may be modified based on the client tax compliance needs (i.e. Form 990-T for reporting of taxable income).

We will enter into an agreement with The Academies CMO in the form of an engagement letter upon acceptance of this proposal document.

We look forward to the opportunity to continue working with the The Academies CMO. Please do not hesitate to contact us with any questions or to arrange an interview. Thank you!

Name of Accounting Firm: Christy White Inc.

Authorized By:  \_\_\_\_\_  
 Name: Marcy Kearney, CPA

Title: Partner

Date: January 15, 2025





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**APPENDIX: QUALITY CONTROL PEER REVIEW OPINION**

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## Report on the Firm's System of Quality Control

December 22, 2023

To Christy White Associates, Inc. and the Peer Review Committee of the California Society of CPAs:

We have reviewed the system of quality control for the accounting and auditing practice of Christy White Associates, Inc (the firm) in effect for the year ended December 31, 2022. Our peer review was conducted in accordance with the Standards for Performing and Reporting on Peer Reviews established by the Peer Review Board of the American Institute of Certified Public Accountants (Standards).

A summary of the nature, objectives, scope, limitations of, and the procedures performed in a System Review as described in the Standards may be found at [www.aicpa.org/prsummary](http://www.aicpa.org/prsummary). The summary also includes an explanation of how engagements identified as not performed or reported in conformity with applicable professional standards, if any, are evaluated by a peer reviewer to determine a peer review rating.

### Firm's Responsibility

The firm is responsible for designing and complying with a system of quality control to provide the firm with reasonable assurance of performing and reporting in conformity with the requirements of applicable professional standards in all material respects. The firm is also responsible for evaluating actions to promptly remediate engagements deemed as not performed or reported on in conformity with the requirements of professional standards, when appropriate, and for remediating weaknesses in its system of quality control, if any.

### Peer Reviewer's Responsibility

Our responsibility is to express an opinion on the design of and compliance with the firm's system of quality control based on our review.

### Required Selections and Considerations

Engagements selected for review included engagements performed under *Government Auditing Standards*, Including compliance audits under the Single Audit Act.

As a part of our peer review, we considered reviews by regulatory entities as communicated by the firm, if applicable, in determining the nature and extent of our procedures.



[www.gbacpa.com](http://www.gbacpa.com)

10850 Gold Center Drive, Suite 260  
Rancho Cordova, CA 95670  
916/922-5109 FAX 916/641-5200

Princeville, HI  
888/763-7323

Together as One. Grant Bennett Associates is a Member of the Alliott Global Alliance of independent professional firms.

# Grant Bennett Associates

A PROFESSIONAL CORPORATION



## Opinion

In our opinion, the system of quality control for the accounting and auditing practice of Christy White Associates, Inc in effect for the year ended December 31, 2022, has been suitably designed and complied with to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Firms can receive a rating of *pass*, *pass with deficiency(ies)* or *fail*. Christy White Associates, Inc has received a peer review rating of *pass*.

*Grant Bennett Associates*

GRANT BENNETT ASSOCIATES  
A PROFESSIONAL CORPORATION  
Certified Public Accountants



[www.gbacpa.com](http://www.gbacpa.com)

10850 Gold Center Drive, Suite 260  
Rancho Cordova, CA 95670  
916/922-5109 FAX 916/641-5200

Princeville, HI  
888/763-7323

Together as One. Grant Bennett Associates is a Member of the Alliott Global Alliance of independent professional firms.



January 7, 2025

### ***Statement of Work - Audit Services***

This agreement constitutes a statement of work ("SOW") under the master service agreement ("MSA") dated February 6, 2023, or superseding MSA, made by and between CliftonLarsonAllen LLP ("CLA," "we," "us," and "our") and The Academies CMO ("you," "your," or "the entity"). We are pleased to confirm our understanding of the terms and objectives of our engagement and the nature and limitations of the services CLA will provide for the entity as of and for the year ended June 30, 2025.

Marlen Gomez is responsible for the performance of the audit engagement. Per Education Code Section 41020(f)(2), there is a limit of six consecutive years for any firm where the principal of the audit and the reviewing principal have been the same in each of those years. This is the first year Marlen Gomez will be the engagement principal.

#### **Scope of audit services**

We will audit the financial statements of The Academies CMO, which comprise the financial statements identified below, and the related notes to the financial statements (collectively, the "financial statements") as of and for the year ended June 30, 2025.

The statement of financial position and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

We will also evaluate and report on the presentation of the supplementary information accompanying the financial statements in relation to the financial statements as a whole.

#### **Nonaudit services**

We will also provide the following nonaudit services:

- Preparation of your financial statements and the related notes.
- Preparation of the supplementary information.
- Preparation of adjusting journal entries, as needed.
- Preparation of the informational tax returns.

#### **Audit objectives**

The objectives of our audit of the financial statements 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 auditors' report that includes our opinion about whether your financial statements are fairly presented, in all material respects, in conformity with accounting principles generally accepted in the United States of America (U.S. GAAP). 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 auditing standards generally accepted in the United States of America (U.S. GAAS) will always detect a material misstatement when it exists. Misstatements, including omissions, can arise from fraud or error and 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.

Our audit will be conducted in accordance with U.S. GAAS and the standards for financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States and the 2024-2025 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting, published by the Education Audit Appeals Panel (State Audit Guide). Those standards require us to be independent of the entity and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. Our audit will include tests of your accounting records and other procedures we consider necessary to enable us to express such an opinion.

We will also perform procedures to enable us to express an opinion on whether the supplementary information accompanying the financial statements is fairly stated, in all material respects, in relation to the financial statements as a whole.

We will issue a written report upon completion of our audit of your financial statements.

We will provide an opinion (or disclaimer of opinion) on compliance with requirements described in the 2024-25 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting, published by the Education Audit Appeals Panel. The State Compliance report will include a paragraph that states that the purpose of the report over compliance is to express an opinion on compliance with the types of requirements described in the 2024-25 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting; however, that the audit does not provide a legal determination of the entity's compliance.

The state compliance report on internal control over compliance will include a paragraph that states that the purpose of the 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 State Audit Guide.

Circumstances may arise in which our report may differ from its expected form and content based on the results of our audit. Depending on the nature of these circumstances, it may be necessary for us to modify our opinion, add an emphasis-of-matter or other-matter paragraph to our auditors' report, or if necessary, withdraw from the engagement. If our opinion is other than unmodified, we will discuss the reasons with you in advance. If circumstances occur related to the condition of your records, the availability of sufficient, appropriate audit evidence, or the existence of a significant risk of material misstatement of the financial statements caused by error, fraudulent financial reporting, or misappropriation of assets, which in our professional judgment prevent us from completing the audit or forming an opinion on the financial

statements, we retain the right to take any course of action permitted by professional standards, including declining to express an opinion or issue a report, or withdrawing from the engagement.

We will also provide a report (which does not include an opinion) on internal control over financial reporting and on compliance with the provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a material effect on the financial statements, as required by *Government Auditing Standards*. The report on internal control over financial reporting and on compliance and other matters will include a paragraph that states (1) that the purpose of the 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, and (2) that the report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. The paragraph will also state that the report is not suitable for any other purpose. If during our audit we become aware that the entity is subject to an audit requirement that is not encompassed in the terms of this engagement, we will communicate to management and those charged with governance that an audit conducted in accordance with U.S. GAAS and the standards for financial audits contained in *Government Auditing Standards* may not satisfy the relevant legal, regulatory, or contractual requirements.

It is our understanding that our auditors' report will be included in your annual report which is comprised of Local Education Organization Structure and that your annual report will be issued concurrent with the financial statement audit. Our responsibility for other information included in your annual report does not extend beyond the financial information identified in our opinion on the financial statements. We have no responsibility for determining whether such other information is properly stated and do not have an obligation to perform any procedures to corroborate other information contained in your annual report. We are required by professional standards to read the other information and consider whether a material inconsistency exists between the other information and the financial statements because the credibility of the financial statements and our auditors' report thereon may be undermined by material inconsistencies between the audited financial statements and other information. If, based on the work performed, we conclude that an uncorrected material misstatement of the other information exists, we are required to describe it in our report.

### **Auditor responsibilities, procedures, and limitations**

We will conduct our audit in accordance with U.S. GAAS, the standards for financial audits contained in *Government Auditing Standards* and the State Audit Guide.

Those standards require that we exercise professional judgment and maintain professional skepticism throughout the planning and performance of the audit. As part of our audit, we will:

- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and evaluate whether audit evidence obtained is sufficient and appropriate to provide a basis for our opinion. 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.

- 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 entity's internal control. However, we will communicate to you in writing any significant deficiencies or material weaknesses in internal control relevant to the audit of the financial statements that we have identified during the audit.

- 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, including the amounts and disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.

- Conclude, based on our evaluation of audit evidence obtained, whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the entity's ability to continue as a going concern for a reasonable period of time.

Although our audit planning has not been concluded and modifications may be made, we have identified the following significant risk(s) of material misstatement as part of our audit planning:

- Override of Management Controls
- Revenue Recognition

There is an unavoidable risk, because of the inherent limitations of an audit, together with the inherent limitations of internal control, that some material misstatements may not be detected, even though the audit is properly planned and performed in accordance with U.S. GAAS and *Government Auditing Standards* and the State Audit Guide. Because we will not perform a detailed examination of all transactions, material misstatements, whether from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets, or (4) violations of laws or governmental regulations that are attributable to the entity or to acts by management or employees acting on behalf of the entity, may not be detected. Because the determination of waste and abuse is subjective, *Government Auditing Standards* do not require auditors to perform specific procedures to detect waste or abuse in financial audits nor do they expect auditors to provide reasonable assurance of detecting waste or abuse.

In addition, an audit is not designed to detect immaterial misstatements or violations of laws or governmental regulations that do not have a direct and material effect on the financial statements. However, we will inform the appropriate level of management and those charged with governance of any material errors, fraudulent financial reporting, or misappropriation of assets that come to our attention. We will also inform the appropriate level of management and those charged with governance of any violations of laws or governmental regulations that come to our attention, unless clearly inconsequential.

Tests of controls may be performed to test the effectiveness of certain controls that we consider relevant to preventing and detecting fraud or errors that are material to the financial statements and to preventing and detecting misstatements resulting from noncompliance with provisions of laws, regulations, contracts, and grant agreements that have a material effect on the financial statements. Our tests, if performed, will be less in scope than would be necessary to render an opinion on internal control and, accordingly, no opinion will

be expressed in our report on internal control issued pursuant to *Government Auditing Standards*. An audit is not designed to provide assurance on internal control or to identify deficiencies, significant deficiencies, or material weaknesses in internal control. However, we will communicate to you in writing significant deficiencies or material weaknesses in internal control relevant to the audit of the financial statements that we identify during the audit that are required to be communicated under AICPA professional standards, *Government Auditing Standards*, and the State Audit Guide.

As part of obtaining reasonable assurance about whether the financial statements are free of material misstatement, we will perform tests of the entity's compliance with the provisions of laws, regulations, contracts, and grant agreements that have a material effect on the financial statements. However, the objective of our audit will not be to provide an opinion on overall compliance and we will not express such an opinion in our report on compliance issued pursuant to *Government Auditing Standards*.

We will include in our report on internal control over financial reporting and on compliance relevant information about any identified or suspected instances of fraud and any identified or suspected noncompliance with provisions of laws, regulations, contracts, or grant agreements that may have occurred that are required to be communicated under *Government Auditing Standards*.

The California Department of Education and State Controller's Office requires that we also plan and perform the audit to obtain reasonable assurance about whether the auditee has complied with state statutes and regulations. Our procedures will consist of tests of transactions and other applicable procedures described in the State Audit Guide for the types of compliance requirements applicable to the entity. The purpose of these procedures will be to express an opinion on the entity's compliance with requirements applicable to the State Audit Guide.

Our responsibility as auditors is limited to the period covered by our audit and does not extend to any later periods for which we are not engaged as auditors.

### **Management responsibilities**

Our audit will be conducted on the basis that you (management and, when appropriate, those charged with governance) acknowledge and understand that you have certain responsibilities that are fundamental to the conduct of an audit.

You are responsible for the preparation and fair presentation of the financial statements in accordance with U.S. GAAP.

Management's responsibilities include the selection and application of accounting principles; recording and reflecting all transactions in the financial statements; determining the reasonableness of significant accounting estimates included in the financial statements; adjusting the financial statements to correct material misstatements; and confirming to us in the management representation letter that the effects of any uncorrected misstatements aggregated by us during the current engagement and pertaining to the latest period presented are immaterial, both individually and in the aggregate, to the financial statements taken as a whole. 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 entity's ability



to continue as a going concern for one year after the date the financial statements are available to be issued.

You are responsible for the design, implementation, and maintenance of effective internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error, including evaluating and monitoring ongoing activities and safeguarding assets to help ensure that appropriate goals and objectives are met. You are responsible for the design, implementation, and maintenance of internal controls to prevent and detect fraud; assessing the risk that the financial statements may be materially misstated as a result of fraud; and for informing us about all known or suspected fraud affecting the entity involving (1) management, (2) employees who have significant roles in internal control, and (3) others where the fraud could have a material effect on the financial statements. Your responsibilities include informing us of your knowledge of any allegations of fraud or suspected fraud affecting the entity received in communications from employees, former employees, grantors, regulators, or others. In addition, you are responsible for implementing systems designed to achieve compliance with applicable laws and regulations and the provisions of contracts and grant agreements; identifying and ensuring that the entity complies with applicable laws, regulations, contracts, and grant agreements; and informing us of all instances of identified or suspected noncompliance whose effects on the financial statements should be considered. You are responsible for taking timely and appropriate steps to remedy any fraud and noncompliance with provisions of laws, regulations, contracts, grant agreements and State Audit Guide that that we may report.

Management is responsible for compliance with applicable laws and regulations and the provisions of contracts and grant agreements, including compliance with state statutes, regulations, and the terms and conditions of state awards applicable to the entity's state programs. Your responsibilities also include identifying significant contractor relationships in which the contractor has responsibility for state compliance and for the accuracy and completeness of that information.

You are responsible for providing us with (1) access to all information of which you are aware that is relevant to the preparation and fair presentation of the financial statements, including amounts and disclosures, such as records, documentation, identification of all related parties and all related-party relationships and transactions, and other matters, and for the accuracy and completeness of that information (including information from within and outside of the general and subsidiary ledgers); (2) access to personnel, accounts, books, records, supporting documentation, and other information as needed to perform an audit under the State Audit Guide; and (3) unrestricted access to persons within the entity from whom we determine it necessary to obtain audit evidence.

You agree to inform us of events occurring or facts discovered subsequent to the date of the financial statements that may affect the financial statements.

Management is responsible for the preparation of the supplementary information in accordance with U.S. GAAP. You agree to include our report on the supplementary information in any document that contains, and indicates that we have reported on, the supplementary information. You also agree to include the audited financial statements with any presentation of the supplementary information that includes our report thereon or make the audited financial statements readily available to users of the supplementary information no later than the date the supplementary information is issued with our report thereon. You agree to provide us written representations related to the presentation of the supplementary information.

Management is responsible for the preparation of other information included in your annual report. You agree to provide the final version of such information to us in a timely manner, and if possible, prior to the date of our auditors' report. If the other information included in your annual report will not be available until after the date of our auditors' report on the financial statements, you agree to provide written representations indicating that (1) the information is consistent with the financial statements, (2) the other information does not contain material misstatements, and (3) the final version of the documents will be provided to us when available, and prior to issuance of the annual report by the entity, so that we can complete the procedures required by professional standards. Management agrees to correct material inconsistencies that we may identify. You agree to include our auditors' report in any document containing financial statements that indicates that such financial statements have been audited by us.

Management is responsible for providing us with a written confirmation concerning representations made by you and your staff to us in connection with the audit. During our engagement, we will request information and explanations from you regarding, among other matters, the entity's operations, internal control, future plans, specific transactions, and accounting systems and procedures. The procedures we will perform during our engagement and the conclusions we reach as a basis for our report will be heavily influenced by the representations that we receive in the representation letter and otherwise from you. Accordingly, inaccurate, incomplete, or false representations could cause us to expend unnecessary effort or could cause a material fraud or error to go undetected by our procedures. In view of the foregoing, you agree that we shall not be responsible for any misstatements in the entity's financial statements that we may fail to detect as a result of misrepresentations made to us by you.

Management is responsible for establishing and maintaining a process for tracking the status of audit findings and recommendations. Management is also responsible for identifying and providing report copies to us of previous financial audits, attestation engagements, performance audits, or other studies related to the objectives discussed in the "Audit objectives" section of this letter. This responsibility includes relaying to us corrective actions taken to address significant findings and recommendations resulting from those audits, attestation engagements, performance audits, or other engagements or studies. You are also responsible for providing management's views on our current findings, conclusions, and recommendations, as well as your planned corrective actions for the report, and for the timing and format for providing that information.

#### **Responsibilities and limitations related to nonaudit services**

For all nonaudit services we may provide to you, management agrees to assume all management responsibilities; oversee the services by designating an individual, preferably within senior management, who possesses suitable skill, knowledge, and/or experience to understand and oversee the services; evaluate the adequacy and results of the services; and accept responsibility for the results of the services.

Management is also responsible for ensuring that your data and records are complete and that you have received sufficient information to oversee the services.

#### **Use of financial statements**

Should you decide to include or incorporate by reference these financial statements and our auditors' report(s) thereon in a future private placement or other offering of equity or debt securities, you agree that we are under no obligation to re-issue our report or provide consent for the use of our report in such a

registration or offering document. We will determine, at our sole discretion, whether we will re-issue our report or provide consent for the use of our report only after we have performed the procedures we consider necessary in the circumstances. If we decide to re-issue our report or consent to the use of our report, we will be required to perform certain procedures including, but not limited to, (a) reading other information incorporated by reference in the registration statement or other offering document and (b) subsequent event procedures. These procedures will be considered an engagement separate and distinct from our audit engagement, and we will bill you separately. If we decide to re-issue our report or consent to the use of our report, you agree that we will be included on each distribution of draft offering materials and we will receive a complete set of final documents. If we decide not to re-issue our report or decide to withhold our consent to the use of our report, you may be required to engage another firm to audit periods covered by our audit reports, and that firm will likely bill you for its services. While the successor auditor may request access to our workpapers for those periods, we are under no obligation to permit such access.

If the parties (i.e., you and CLA) agree that CLA will not be involved with your official statements related to municipal securities filings or other offering documents, we will require that any official statements or other offering documents issued by you with which we are not involved clearly indicate that CLA is not involved with the contents of such documents. Such disclosure should read as follows:

CliftonLarsonAllen LLP, our independent auditor, has not been engaged to perform and has not performed, since the date of its report included herein, any procedures on the financial statements addressed in that report. CliftonLarsonAllen LLP also has not performed any procedures relating to this offering document.

With regard to the electronic dissemination of audited financial statements, including financial statements published electronically on your website or submitted on a regulator website, you understand that electronic sites are a means to distribute information and, therefore, we are not required to read the information contained in those sites or to consider the consistency of other information in the electronic site with the original document.

We may issue preliminary draft financial statements to you for your review. Any preliminary draft financial statements should not be relied on or distributed.

#### **Engagement administration and other matters**

We understand that your employees will prepare all confirmations, account analyses, and audit schedules we request and will locate any documents or invoices selected by us for testing. A list of information we expect to need for our audit and the dates required will be provided in a separate communication.

We will provide copies of our reports to the entity; however, management is responsible for distribution of the reports and the financial statements. Unless restricted by law or regulation, or containing confidential or sensitive information, copies of our reports are to be made available for public inspection.

The audit documentation for this engagement is the sole and exclusive property of CLA and constitutes confidential and proprietary information. However, subject to applicable laws and regulations, audit documentation and appropriate individuals will be made available upon request and in a timely manner to

California Department of Education, California State Controllers Office, and authorizer(s), or its designee, a federal agency providing direct or indirect funding, or the U.S. Government Accountability Office for purposes of a quality review of the audit, to resolve audit findings, or to carry out oversight responsibilities. We will notify you of any such request. If requested, access to such audit documentation will be provided under the supervision of CLA personnel. Furthermore, upon request, we may provide copies or electronic versions of selected audit documentation to the aforementioned parties. These parties may intend, or decide, to distribute the copies or information contained therein to others, including other governmental agencies.

The audit documentation for this engagement will be retained for a minimum of seven years after the report release date or for any additional period requested by the California Department of Education, California State Controllers Office, and authorizer(s). If we are aware that a federal or state awarding agency, pass-through entity, or auditee is contesting an audit finding, we will contact the party(ies) contesting the audit finding for guidance prior to destroying the audit documentation.

Professional standards require us to be independent with respect to you in the performance of these services. Any discussion that you have with our personnel regarding potential employment with you could impair our independence with respect to this engagement. Therefore, we request that you inform us prior to any such discussions so that we can implement appropriate safeguards to maintain our independence and objectivity. Further, any employment offers to any staff members working on this engagement without our prior knowledge may require substantial additional procedures to ensure our independence. You will be responsible for any additional costs incurred to perform these procedures.

Our audit engagement ends on delivery of our signed report. Any additional services that might be requested will be a separate, new engagement. The terms and conditions of that new engagement will be governed by a new, specific SOW for that service.

Government Auditing Standards require that we make our most recent external peer review report publicly available. The report is posted on our website at [www.CLAconnect.com/Aboutus/](http://www.CLAconnect.com/Aboutus/).

## **Fees**

Audit, including current state compliance procedures - \$22,500

Tax Return - \$4,000

We will also bill for expenses (including travel, report production, word processing, postage, internal and administrative charges, etc.) plus a technology and client support fee of five percent (5%) of all professional fees billed. Our invoices, including applicable state and local taxes, are payable on presentation.

There is a ten percent withholding clause per Education Code 14505.

## **Bill to be mailed on**

April 2025

## **Amount to be billed**

\$7,500

October 2025	\$7,500
November 2025	\$7,500

Additional state compliance procedures related to changes to the 2024-2025 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting, published by the Education Audit Appeals Panel will be billed as out-of-scope.

**Unexpected circumstances**

We will advise you if unexpected circumstances require significant additional procedures resulting in a substantial increase in the fee estimate.

**Changes in accounting and audit standards**

Standard setters and regulators continue to evaluate and modify standards. Such changes may result in new or revised financial reporting and disclosure requirements or expand the nature, timing, and scope of the activities we are required to perform. To the extent that the amount of time required to provide the services described in the SOW increases due to such changes, our fee may need to be adjusted. We will discuss such circumstances with you prior to performing the additional work.

**Agreement**

We appreciate the opportunity to provide the services described in this SOW related to the MSA. All terms and provisions of the MSA shall apply to these services. If you agree with the terms of this SOW, please sign below to indicate your acknowledgement and understanding of, and agreement with, this SOW.

Sincerely,

**CliftonLarsonAllen LLP**

**Response:**

This letter correctly sets forth the understanding of The Academies CMO.

FOR DISCUSSION PURPOSES - TO BE SIGNED ELECTRONICALLY

**CLA**  
CLA

**Client**  
The Academies CMO

SIGN:

\_\_\_\_\_  
Marlen Gomez, Principal

SIGN:

\_\_\_\_\_  
Donya Ball

DATE:

\_\_\_\_\_

DATE:

\_\_\_\_\_

FOR DISCUSSION PURPOSES - TO BE SIGNED ELECTRONICALLY



# The Academies CMO

Proposal for  
Independent Audit Services

<https://whkcpa.com>



December 19, 2024

The Academies CMO  
6832 Avenue 280  
Visalia, CA 93277

We are pleased to have this opportunity to present you with a proposal for independent audit services. As a firm with extensive experience auditing California school districts, county offices of education, charter schools, and JPAs we understand the requirements of this engagement for The Academies CMO (the School) and the importance of providing the School with reports by the required deadlines. We are confident we can meet the needs of the School as outlined in the RFP.

Our firm specializes in California Local Education Agencies (LEA), with 85% of our time devoted to California LEA's performing the following services:

- Financial Audits
- State Compliance Audits
- Federal Compliance Audits
- Proposition 39 Bond Performance Audits
- OPSC Performance Audits
- Internal Control Evaluations
- Fraud Investigations
- Consulting Services

I am authorized to execute and negotiate this contract on behalf of Wilkinson Hadley King & Co. LLP. Should you have any questions concerning our proposal or you need any additional information, please contact me at (619) 447-6700 or [ksproul@whkcpa.com](mailto:ksproul@whkcpa.com).

Sincerely,



Kevin Sproul, CPA  
Managing Partner



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## **Background & Experience**

### **Firm's Background and Experience**

The firm of Wilkinson Hadley King & Co. LLP was formed in January 2002 and is a local accounting with two offices located in El Cajon, California and Berkeley, California.

The partners of the firm have collectively more than 50 years of experience in auditing school districts, charter schools, governmental agencies, and nonprofit organizations. Managers and staff have collectively more than 50 years of experience in auditing public entities and nonprofit organizations.

Our firm has been engaged to work with California LEAs of all sizes. We currently audit the largest elementary school district in the state along with a number of other large districts. While every audit is unique, the breadth of our experience ensure that we can provide the The Academies CMO (the School) with the expertise and understanding needed for an effective and efficient engagement.

### **Experience in Auditing Computerized Systems**

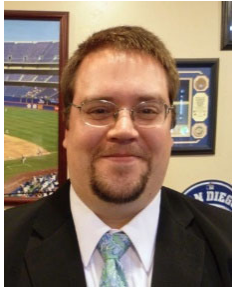
As a firm who specializes in auditing LEAs, we are extremely familiar with the requirements on auditing your computerized systems. The variety of automated fund accounting software programs, spreadsheets, report writers, and specialized programs seem unlimited. Our auditors and consultants are familiar with the most common systems used by our clients. Because of our experience, we are familiar with the capabilities and limitations of the programs most commonly utilized by California LEAs, including PeopleSoft.

A review and evaluation of District information technology systems will be performed during the audit due to the integral nature and relationship to the financial reporting of the School. Both general information technology (IT) controls and application controls will be assessed during the planning of the audit. Systems tests for integrity, system security tests, use of computer assisted audit tools (CAATs), and/or the use of an IT specialist will be applied as deemed necessary to achieve the planned audit objectives.

### **Qualifications**

Wilkinson Hadley King & Co. LLP is committed to ensuring you receive the best auditing services available on a year-to-year basis. We are committed to providing consistent reliable services to our clients. All partners and engagement teams meet regularly to discuss the audits and plan the most appropriate approach. Additionally, all staff receive extensive training specific to California LEA audits.

**Aubrey W. Mann, CPA, Engagement Partner**



Kevin is a graduate of the University of Louisville with degrees in both Accounting and Business Administration. He began his accounting career within a private company working directly under the CFO in Louisville, Kentucky. Kevin joined the firm in 2013 and was admitted as a partner in 2016. Kevin is a licensed Certified Public Accountant in the state of California and is also a member of the California Association of Certified Public Accountants. Kevin has experience in audits of local school districts and charter schools.

Kevin began participating on the planning committee for the School District Conference put on by the California Society of CPA's in 2015. He Co-Chaired the 2018 conference. Kevin also participates on the audit guide committee which makes recommendations to the Education Audit Appeals Panel in preparing the audit guide for California K-12 Local Education Agencies. Kevin is also a member of the AICPA, the California Society of Certified Public Accountants (CalCPA), and the California Association of School Business Officials (CASBO).

**Peer Review**

Wilkinson Hadley King & Co. LLP firm works hard to ensure all audits by the firm are completed based on the highest standards as outlined in *Generally Accepted Government Auditing Standards*.

Our firm participates in the American Institute of Public Accountants (AICPA) Peer Review Program which evaluates the firm's system of quality control. Our most recent peer review was completed for the year ended December 31, 2023 in which our firm received a score of "Pass", which is the best score that can be received in a peer review.

A copy of the peer review report has been provided on the following page. As our firm received a rating of pass, no deficiencies were noted for the review of the year ended December 31, 2023.

# *Poulsen VanLeuven & Catmull PA*

**Certified Public Accountants**

Members of the American Institute of CPA's  
and the Idaho Society of CPA's  
**Jeffrey D. Poulsen, CPA**  
**Darren B. VanLeuven, CPA**  
**Jacob H. Catmull, CPA**

## Report on the Firm's System of Quality Control

July 31, 2024

To the Owners of  
Wilkinson Hadley King & Co LLP  
and the Peer Review Committee of the California Society of CPAs

We have reviewed the system of quality control for the accounting and auditing practice of Wilkinson Hadley King & Co LLP (the firm) in effect for the year ended December 31, 2023. Our peer review was conducted in accordance with the Standards for Performing and Reporting on Peer Reviews established by the Peer Review Board of the American Institute of Certified Public Accountants (Standards).

A summary of the nature, objectives, scope, limitations of, and the procedures performed in a System Review as described in the Standards may be found at [www.aicpa.org/prsummary](http://www.aicpa.org/prsummary). The summary also includes an explanation of how engagements identified as not performed or reported in conformity with applicable professional standards, if any, are evaluated by a peer reviewer to determine a peer review rating.

### Firm's Responsibility

The firm is responsible for designing and complying with a system of quality control to provide the firm with reasonable assurance of performing and reporting in conformity with the requirements of applicable professional standards in all material respects. The firm is also responsible for evaluating actions to promptly remediate engagements deemed as not performed or reported on in conformity with the requirements of applicable professional standards, when appropriate, and for remediating weaknesses in its system of quality control, if any.

### Peer Reviewer's Responsibility

Our responsibility is to express an opinion on the design of and compliance with the firm's system of quality control based on our review.

### Required Selections and Considerations

Engagements selected for review included engagements performed under *Government Auditing Standards*, including compliance audits under the Single Audit Act.

As a part of our peer review, we considered reviews by regulatory entities as communicated by the firm, if applicable, in determining the nature and extent of our procedures.

### Opinion

In our opinion, the system of quality control for the accounting and auditing practice of Wilkinson Hadley King & Co LLP in effect for the year ended December 31, 2023, has been suitably designed and complied with to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Firms can receive a rating of *pass*, *pass with deficiency(ies)* or *fail*. Wilkinson Hadley King & Co LLP has received a peer review rating of *pass*.

*Poulsen, VanLeuven & Catmull*  
Poulsen, VanLeuven & Catmull P.A.

## AICPA Governmental Audit Quality Center Membership



Wilkinson Hadley King & Co. PPC are members of the American Institute of Certified Public Accountants (AICPA) Governmental Audit Quality Center, which is committed to the highest standards of quality in governmental audits.

As a national community of CPA firms, these memberships provide access to best practices and tools that help ensure the quality of governmental audits while providing the up-to-date information needed to serve the School during this engagement.

### Audit Timing and Communications

Interim and fall audit dates will be scheduled by February of each year. Audit requests will be loaded to Suralink with sufficient time for you to upload before audit dates are scheduled. During our scheduled field work dates, our time is devoted to your audit. Our teams are trained to communicate throughout the audit process. We are committed to providing both your team and ours sufficient time to complete the audits by the December 15<sup>th</sup> deadline each year.

### Experience

The Firm has extensive experience in audits of Local Education Agencies in California. Partners of the firm are heavily involved in the industry, including participation on the audit guide committee, the school district conference and the Governmental Accounting and Auditing Committee. Additionally, the Firm has built relationships with oversight agencies which has proven to be of value to our clients.

As noted previously, in charge auditors assigned to your engagement will hold a minimum of five years’ experience in audits of California Local Education Agencies. Additionally, all staff will receive extensive training specific to the unique audit needs of County Offices of Education.

Below is a summary of our firm’s engagements for 2023-24 fiscal year:

	2023-24
Description	Engagements
County Office of Education Audits	4
School District Audits	52
Charter School Audits	71
Not-for-Profit Audits	16
Prop 39 Bond Audits	27
OPSC Performance Audits	26
Agreed Upon Procedures	26
Compilations	4
<b>Total Engagements</b>	<b>226</b>

## References

The following selection of references are California school districts whose financial statements have been recently audited by Wilkinson Hadley King & Co. LLP.

### **Lifelong Learning Administration Corporation**

177 Holston Drive

Lancaster, California 93535

Contact: Aracely Mayoral

P: (661) 272-1225

E: [amayoral@llac.org](mailto:amayoral@llac.org)

Work Performed: Single Audits, California Charter School Audits

Years Served: 10+

### **Helix Charter High School**

7323 University Ave

La Mesa, CA 91942

Contact: David Yaeger

P: (619) 644-1940

E: [yeager@helixcharter.com](mailto:yeager@helixcharter.com)

Work Performed: Single Audit, California Charter School Audit

Years Served: 10+

### **Granada Hills Charter School**

10535 Zelzah Avenue

Granada Hills, CA 91344

Contact: Tammy Stanton

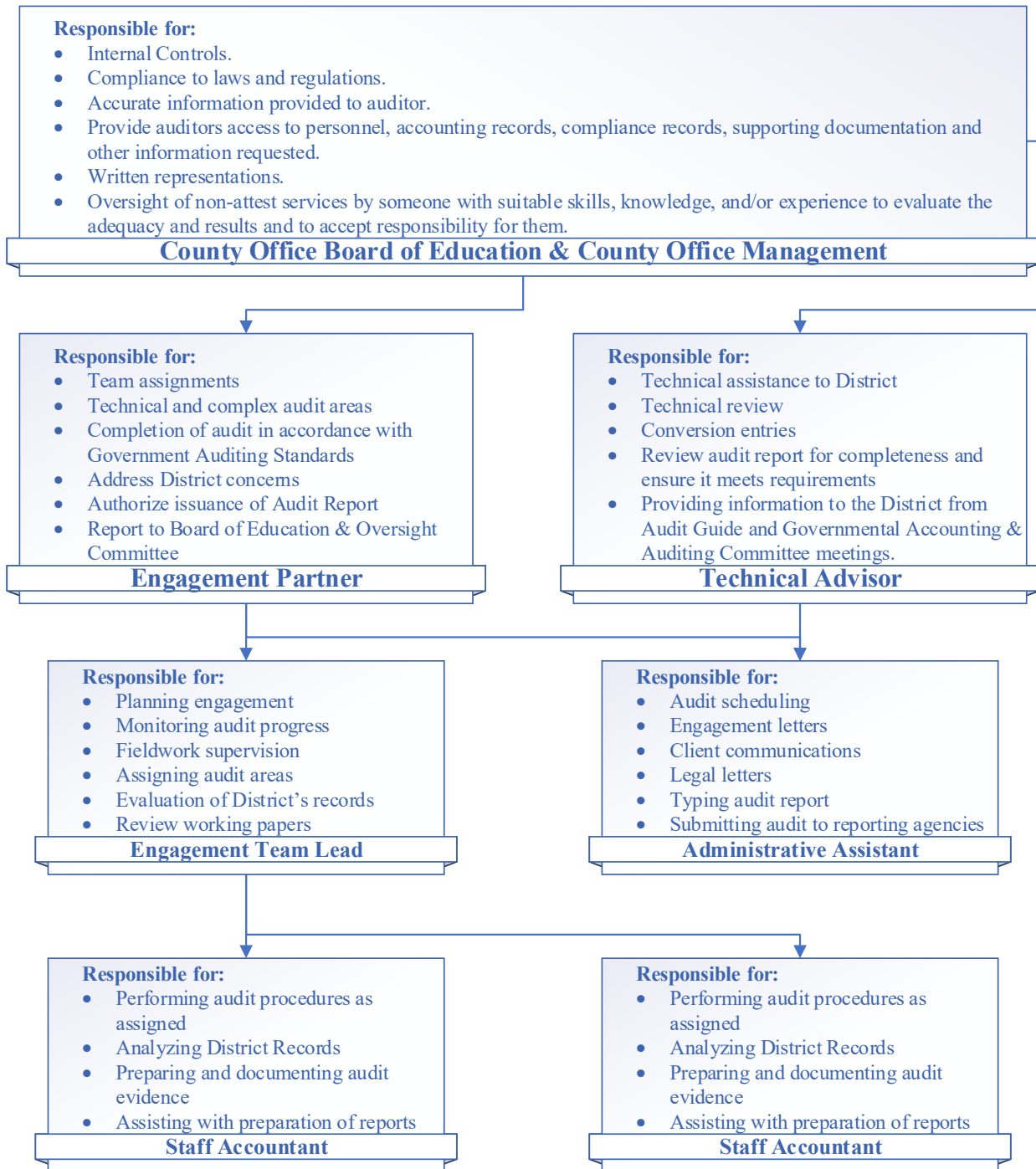
P: (818) 360-2361

E: [tammystanton@ghctk12.com](mailto:tammystanton@ghctk12.com)

Work Performed: Single Audit, California Charter School Audit

Years Served: 10+

### Proposed Organizational Structure and Functional Roles



### Proposed Engagement Team

### Personnel Changes

Wilkinson Hadley King & Co. LLP is committed to assigning the audit to appropriate teams and to keep consistency among team members and assignments from year to year where possible. The engagement partner, reviewing partner, and team lead are not anticipated to change during the contracted period. We encourage all of our team members to advance in positions as they gain relevant experience and certifications, as such staff accountants may be assigned to be team leads or audit managers on other teams during the contracted period.

### Litigation, Arbitration, Disciplinary Action, Regulatory Investigations, or Terminated Contracts

We can confirm that neither the firm nor any partner or employee of the firm have any of the following:

- Actual or pending litigation or arbitration in relation to the provision of audit services whether as a plaintiff or a defendant.
- Actual or pending litigation or arbitration in relation to professional misconduct, bad faith or any acts of moral turpitude, discrimination, or sexual abuse and/or misconduct.
- Actual or pending disciplinary action and/or investigation by any regulatory agencies or professional organization.
- Contracts terminated for convenience or default in the most recent five (5) years.

WHK Team Member	Position	Years of Audit Experience
Kevin Sproul, CPA	Engagement Partner & Supervisor	13
Alec Baker, CPA	Manager	4
Angelo Garcia	Team Member	3
Breelynn Saucedo	Team Member	2
Jessica Smith	Team Member	1



**Resume – Kevin Sproul, CPA**

**PRESENT POSITION:** Partner – Wilkinson Hadley King & Co. LLP

**RESPONSIBILITIES AND**

**EXPERIENCE: (13 years)** Engage in audits of California school districts, charter schools and other nonprofit entities, including planning, supervision and review of audits.

Specific expertise in the areas of governmental and nonprofit auditing and accounting.

Prepare audit reports, inclusive of findings and recommendations for clients.

Provide consulting and technical accounting for a variety of nonprofit, governmental and exempt agencies.

**PROFESSIONAL:**

Certified Public Accountant in California, Certificate #123146

Member, American Institute of Certified Public Accountants (AICPA) with membership in Government Audit Quality Center (GAQC)

Member, California Society of Certified Public Accountants (CalCPA)

Member, California Association of School Business Officials (CASBO)

**EDUCATION:**

**Bachelors of Science, Accounting**

University of Louisville

**Bachelors of Science, Business Management**

University of Louisville

**Resume – Alec Baker, CPA**

**PRESENT POSITION:**     **Manager – Wilkinson Hadley King & Co. LLP**

**RESPONSIBILITIES AND**

**EXPERIENCE: (4 years)**   Engage in audits of California school districts, charter schools and other nonprofit entities, including planning, supervision and review of audits.

Specific expertise in the areas of governmental and nonprofit auditing and accounting.

Prepare audit reports, inclusive of findings and recommendations for clients.

Provide consulting and technical accounting for a variety of nonprofit, governmental and exempt agencies.

**PROFESSIONAL:**

Certified Public Accountant

Member, American Institute of Certified Public Accountants (AICPA) with membership in Government Audit Quality Center (GAQC)

Member, California Society of Certified Public Accountants (CalCPA)

Member, California Association of School Business Officials (CASBO)

**EDUCATION:**

**Bachelor’s Degree, Accounting**

California State Santa Barbara

## Scope of Services

We propose to provide the following services to the School:

1. Financial and Compliance audit for The Academies CMO under *Governmental Auditing Standards* in compliance with the *Uniform Guidance* and the *Guide for Audits of California K-12 Local Education Agencies and State Compliance Reporting* published annually by the Education Audit Appeals Panel.

## Deliverables

Included in the fixed price fee are the following deliverables:

Financial & Compliance Audit      1 electronic copy

Additionally, an electronic copy will be submitted to the California State Controller’s Office, the California Department of Education, Inyo County Office of Education, and if applicable, the Federal Audit Clearinghouse.

If applicable, we will prepare the reporting package for Uniform Guidance Single Audit submission to the Federal Audit Clearinghouse; however, the submission requires the School to certify and submit as a final step. We will work with you throughout that process to ensure all reporting has been met.

## Audit Documentation

Wilkinson Hadley King & Co. LLP has appropriate policies and procedures in place to ensure proper retention of audit documentation for a period of at least five (5) years in accordance with firm policies and per the requirements of the RFP. Additionally, our system of quality control ensures that all documentation is consistent with *Government Auditing Standards*.

## Technical Standards

Wilkinson Hadley King & Co. LLP is committed to meeting all requirements for the audits, including technical standards outlined in the RFP.

## Security of Information

Our firm utilizes the secure platform “Suralink” for sharing of all documents and information related to the audit. In addition, we have a cyber security team that monitors our computers and server to ensure risks are addressed timely and all data is secure.

## Compensation

Professional services should create opportunities while controlling costs. As professional advisors, we will share management’s cost concerns, working closely with your personnel to enhance the efficiency and cost-effectiveness of our services.

Considering our qualifications and the quality of service we provide; it is not surprising that so many of our clients continue to work with us. We would be most honored to receive your

**PROPOSAL FOR INDEPENDENT AUDIT SERVICES**

acceptance of our proposal and look forward to helping with the School’s financial and managerial excellence.

We propose the following audit fees:

Description	2024-25	2025-26	2026-27
Financial and Compliance Audit - Sycamore Valley Academy	\$ 8,000	\$ 8,250	\$ 8,500
Financial and Compliance Audit - Blue Oak Academy	8,000	8,250	8,500
Tax Return Preparation	1,500	1,600	1,700
Single Audit*	3,500	3,500	3,500
Travel Costs**	5,000	5,500	6,000
<b>Maximum All Inclusive Cost</b>	<b>\$ 26,000</b>	<b>\$ 27,100</b>	<b>\$ 28,200</b>

\*Single audits under Uniform Guidance are required when federal expenditures exceed \$750,000 (\$1,000,000 starting in the 2025-26 audit year). If the School does not go above this threshold, there will not be a need for a single audit and this fee will not be charged.

\*\* Travel costs will be charged at actual costs incurred up to a maximum of amounts as noted above. We make every effort to keep costs at a minimum. We operate under a hybrid approach to the audit where some items are tested in person and the remainder of the audit is completed remotely through our secure portal. This allows us to gain a full understanding of your internal control process and environment while also limiting costs of travel charged to our clients. We anticipate a need to travel for interim work on the 2024-25 audit, but after that if the School is providing needed items to our secure portal timely we can transition to fully remote if that is the preference of the School.

The following represents our firm’s billing rates for any additional accounting or audit work that may be requested by the School. We will not engage any services outside of the annual audit without advance permission. The following represents our hourly rate for school districts which are discounted 25% from our standard hourly rates:

Classification	Rate
Partner	\$ 250
Manager	\$ 195
Senior Accountant	\$ 165
Staff Accountant	\$ 125
Clerical	\$ 75

## Assurances

We attest that our firm will meet all requirements as listed in the School's RFP for Independent Audit Services, including the following:

- Wilkinson Hadley King & Co. LLP is a properly licensed certified public accounting firm in California. In addition, all key professional staff assigned to this audit will be properly, licensed certified public accountants.
- Wilkinson Hadley King & Co. LLP meets the independence requirements of *Government Auditing Standards* and those of the AICPA Code of Conduct. We have established the proper procedures to query our employees and have determined that there are no independence issues that would prevent us from issuing an opinion of the School's financial statements.
- Wilkinson Hadley King & Co. LLP has no record of substandard work.
- Wilkinson Hadley King & Co. LLP agrees to the primary purpose of the audit as outlined in the School's RFP. No extended services will be performed under this contract unless authorized by the School. Any such additional work will be discussed with the School in advance and the existing agreement with the School will be amended to reflect the change in services.
- In accordance with auditing standards and other applicable guidelines and regulations, Wilkinson Hadley King & Co. LLP will select the procedures necessary to test compliance and disclose noncompliance with specified laws, regulations and contracts.
- Wilkinson Hadley King & Co. LLP is committed to customer service and will work with the School to ensure all expectations are met for the engagements.

# Blue Oak Academy

## 2023-2024 School Accountability Report Card (Published During the 2024-2025 School Year)



### General Information about the School Accountability Report Card (SARC)

#### SARC Overview



By February 1 of each year, every school in California is required by state law to publish a School Accountability Report Card (SARC). The SARC contains information about the condition and performance of each California public school. Under the Local Control Funding Formula (LCFF) all local educational agencies (LEAs) are required to prepare a Local Control and Accountability Plan (LCAP), which describes how they intend to meet annual school-specific goals for all pupils, with specific activities to address state and local priorities. Additionally, data reported in an LCAP is to be consistent with data reported in the SARC.

- For more information about SARC requirements and access to prior year reports, see the California Department of Education (CDE) SARC web page at <https://www.cde.ca.gov/ta/ac/sa/>.
- For more information about the LCFF or the LCAP, see the CDE LCFF web page at <https://www.cde.ca.gov/fg/aa/lc/>.
- For additional information about the school, parents/guardians and community members should contact the school principal or the district office.

A hard copy of the School Accountability Report Card is available at your School Office, upon request.

#### DataQuest



DataQuest is an online data tool located on the CDE DataQuest web page at <https://dq.cde.ca.gov/dataquest/> that contains additional information about this school and comparisons of the school to the district and the county. Specifically, DataQuest is a dynamic system that provides reports for accountability (e.g., test data, enrollment, high school graduates, dropouts, course enrollments, staffing, and data regarding English learners).

#### California School Dashboard



The California School Dashboard (Dashboard) <https://www.caschooldashboard.org/> reflects California's new accountability and continuous improvement system and provides information about how LEAs and schools are meeting the needs of California's diverse student population. The Dashboard contains reports that display the performance of LEAs, schools, and student groups on a set of state and local measures to assist in identifying strengths, challenges, and areas in need of improvement.

#### Internet Access

Internet access is available at public libraries and other locations that are publicly accessible (e.g., the California State Library). Access to the Internet at libraries and public locations is generally provided on a first-come, first-served basis. Other use restrictions may include the hours of operation, the length of time that a workstation may be used (depending on availability), the types of software programs available on a workstation, and the ability to print documents.

<b>Admission Requirements for the University of California (UC)</b>	Admission requirements for the UC follow guidelines set forth in the Master Plan, which requires that the top one-eighth of the state's high school graduates, as well as those transfer students who have successfully completed specified college course work, be eligible for admission to the UC. These requirements are designed to ensure that all eligible students are adequately prepared for University-level work. For general admissions requirements, please visit the UC Admissions Information website at <a href="https://admission.universityofcalifornia.edu/">https://admission.universityofcalifornia.edu/</a> .
<b>Admission Requirements for the California State University (CSU)</b>	Eligibility for admission to the CSU is determined by three factors: (1) Specific high school courses, (2) Grades in specified courses and test scores, and (3) Graduation from high school. Some campuses have higher standards for particular majors or students who live outside the local campus area. Because of the number of students who apply, a few campuses have higher standards (supplementary admission criteria) for all applicants. Most CSU campuses have local admission guarantee policies for students who graduate or transfer from high schools and colleges that are historically served by a CSU campus in that region. For admission, application, and fee information, see the CSU website at <a href="https://www2.calstate.edu/">https://www2.calstate.edu/</a> .

### 2024-25 School Contact Information

<b>School Name</b>	Blue Oak Academy
<b>Street</b>	28050 Rd 148
<b>City, State, Zip</b>	Visalia, Ca, 93292
<b>Phone Number</b>	5597307422
<b>Principal</b>	Staci Soares
<b>Email Address</b>	ssoares@blueoakacademy.org
<b>School Website</b>	<a href="https://www.blueoakacademy.org/">https://www.blueoakacademy.org/</a>
<b>Grade Span</b>	K-8
<b>County-District-School (CDS) Code</b>	54105460135459

### 2024-25 District Contact Information

<b>District Name</b>	Blue Oak Academy
<b>Phone Number</b>	5597307422
<b>Superintendent</b>	Donya Ball
<b>Email Address</b>	dball@theacademiescharters.org
<b>District Website</b>	<a href="https://www.theacademiescharters.org/">https://www.theacademiescharters.org/</a>

### 2024-25 School Description and Mission Statement

**Our Mission:**  
The mission of our school is to provide a rich, meaningful education in a nurturing environment, where students are continually challenged, and their natural curiosity, creativity, and talents can thrive. We are a collaborative community of educators and families working together to help our students grow into virtuous, courageous, and intelligent citizens, equipped with a love of learning and a love of life, and eager to contribute to a better world.

**Our Vision:**  
The Academies' charter schools model transformative change in education by elevating expectations of learning and growth.

## 2024-25 School Description and Mission Statement

With grit, tenacity, and empathy, we improve the world around us by embracing challenges as problem-solvers. We create an inclusive community with access to rigorous and enriching educational experiences that challenge and support individuals to achieve their personal best and realize new opportunities.

### About Our School:

Blue Oak Academy (BOA) is a tuition-free TK-8 charter school located in Visalia, proudly serving the diverse children of Tulare County since opening its doors in August 2017. Our site-based instructional model combines project-based learning, differentiated and individualized instruction, multi-age classrooms, a looping structure, and a rich curriculum that includes Spanish, music, hands-on science, and service-learning opportunities. We are deeply committed to helping each student grow and improve every day. By fostering a supportive and enriching environment, we strive to educate the whole child—mind, heart, and character. Our school community inspires students to build resilience, pursue excellence, and embrace growth, equipping them to contribute to their communities both now and in the future. As a school of choice, Blue Oak Academy families share our vision for education. Together, we embrace the following guiding philosophies:

The heart of Blue Oak Academy is our unwavering belief that every child deserves equal opportunities to learn, grow, and thrive. Together, we are building a community where students are empowered to achieve their fullest potential and inspired to improve themselves and the world around them—every single day.

## About this School

### 2023-24 Student Enrollment by Grade Level

Grade Level	Number of Students
Kindergarten	84
Grade 1	44
Grade 2	42
Grade 3	45
Grade 4	43
Grade 5	40
Grade 6	56
Grade 7	28
Grade 8	32
<b>Total Enrollment</b>	<b>414</b>



## 2023-24 Student Enrollment by Student Group

Student Group	Percent of Total Enrollment
Female	50
Male	49.8
Non-Binary	0.2
American Indian or Alaska Native	0.5
Asian	1
Black or African American	0.2
Hispanic or Latino	59.2
Two or More Races	1.7
White	35
English Learners	9.2
Homeless	0.7
Socioeconomically Disadvantaged	40.8
Students with Disabilities	12.8

### A. Conditions of Learning **State Priority: Basic**

The SARC provides the following information relevant to the State priority: Basic (Priority 1):

- Degree to which teachers are appropriately assigned and fully credentialed in the subject area and for the pupils they are teaching;
- Pupils have access to standards-aligned instructional materials; and
- School facilities are maintained in good repair.

## 2020-21 Teacher Preparation and Placement

Authorization/Assignment	School Number	School Percent	District Number	District Percent	State Number	State Percent
<b>Fully (Preliminary or Clear) Credentialed for Subject and Student Placement (properly assigned)</b>	9.10	80.33	120.70	60.54	228366.10	83.12
<b>Intern Credential Holders Properly Assigned</b>	1.00	8.74	10.30	5.21	4205.90	1.53
<b>Teachers Without Credentials and Misassignments (“ineffective” under ESSA)</b>	1.20	10.93	8.30	4.19	11216.70	4.08
<b>Credentialed Teachers Assigned Out-of-Field (“out-of-field” under ESSA)</b>	0.00	0.00	22.30	11.20	12115.80	4.41
<b>Unknown/Incomplete/NA</b>	0.00	0.00	37.50	18.85	18854.30	6.86
<b>Total Teaching Positions</b>	11.40	100.00	199.30	100.00	274759.10	100.00

Note: The data in this table is based on full-time equivalent (FTE) status. One FTE equals one staff member working full-time; one FTE could also represent two staff members who each work 50 percent of full-time. Additionally, an assignment is defined as a position that an educator is assigned based on setting, subject, and grade level. An authorization is defined as the services that an educator is authorized to provide to students.

## 2021-22 Teacher Preparation and Placement

Authorization/Assignment	School Number	School Percent	District Number	District Percent	State Number	State Percent
<b>Fully (Preliminary or Clear) Credentialed for Subject and Student Placement (properly assigned)</b>	11.50	74.19	173.80	67.18	234405.20	84.00
<b>Intern Credential Holders Properly Assigned</b>	1.00	6.45	17.10	6.64	4853.00	1.74
<b>Teachers Without Credentials and Misassignments (“ineffective” under ESSA)</b>	3.00	19.35	16.00	6.20	12001.50	4.30
<b>Credentialed Teachers Assigned Out-of-Field (“out-of-field” under ESSA)</b>	0.00	0.00	7.40	2.89	11953.10	4.28
<b>Unknown/Incomplete/NA</b>	0.00	0.00	44.10	17.08	15831.90	5.67
<b>Total Teaching Positions</b>	15.50	100.00	258.70	100.00	279044.80	100.00

Note: The data in this table is based on Full-Time Equivalent (FTE) status. One FTE equals one staff member working full time; one FTE could also represent two staff members who each work 50 percent of full time. Additionally, an assignment is defined as a position that an educator is assigned based on setting, subject, and grade level. An authorization is defined as the services that an educator is authorized to provide to students.

## 2022-23 Teacher Preparation and Placement

Authorization/Assignment	School Number	School Percent	District Number	District Percent	State Number	State Percent
<b>Fully (Preliminary or Clear) Credentialed for Subject and Student Placement (properly assigned)</b>	14.00	77.78	169.90	65.02	231142.40	100.00
<b>Intern Credential Holders Properly Assigned</b>	2.00	11.11	23.70	9.09	5566.40	2.00
<b>Teachers Without Credentials and Misassignments (“ineffective” under ESSA)</b>	2.00	11.11	17.00	6.53	14938.30	5.38
<b>Credentialed Teachers Assigned Out-of-Field (“out-of-field” under ESSA)</b>	0.00	0.00	4.40	1.69	11746.90	4.23
<b>Unknown/Incomplete/NA</b>	0.00	0.00	46.10	17.67	14303.80	5.15
<b>Total Teaching Positions</b>	18.00	100.00	261.30	100.00	277698	100

Note: The data in this table is based on Full-Time Equivalent (FTE) status. One FTE equals one staff member working full time; one FTE could also represent two staff members who each work 50 percent of full time. Additionally, an assignment is defined as a position that an educator is assigned based on setting, subject, and grade level. An authorization is defined as the services that an educator is authorized to provide to students.

## Teachers Without Credentials and Misassignments (considered “ineffective” under ESSA)

Authorization/Assignment	2020-21	2021-22	2022-23
<b>Permits and Waivers</b>	1.00	2.00	1
<b>Misassignments</b>	0.20	1.00	1
<b>Vacant Positions</b>	0.00	0.00	0
<b>Total Teachers Without Credentials and</b>	1.20	3.00	2

## Credentialed Teachers Assigned Out-of-Field (considered “out-of-field” under ESSA)

Indicator	2020-21	2021-22	2022-23
<b>Credentialed Teachers Authorized on a Permit or Waiver</b>	0.00	0.00	0
<b>Local Assignment Options</b>	0.00	0.00	0
<b>Total Out-of-Field Teachers</b>	0.00	0.00	0

## Class Assignments

Indicator	2020-21	2021-22	2022-23
<b>Misassignments for English Learners</b> (a percentage of all the classes with English learners taught by teachers that are misassigned)	0.00	0	9
<b>No credential, permit or authorization to teach</b> (a percentage of all the classes taught by teachers with no record of an authorization to teach)	20.00	0	7.1

Note: For more information refer to the Updated Teacher Equity Definitions web page at <https://www.cde.ca.gov/pd/ee/teacherequitydefinitions.asp>.

## 2024-25 Quality, Currency, Availability of Textbooks and Other Instructional Materials

Year and month in which the data were collected: January 2025

Subject	Textbooks and Other Instructional Materials/year of Adoption	From Most Recent Adoption ?	Percent Students Lacking Own Assigned Copy
<b>Reading/Language Arts</b>	<p>Transitional Kindergarten- Core: Creative Curriculum Supplementals:</p> <ul style="list-style-type: none"> <li>• Phonemic Awareness by Michael Heggerty</li> <li>• Nancy Fetzer Reading and Writing Strategies</li> <li>• Rigby, Scholastic, Decodables and Booksource Leveled Readers</li> <li>• Project Based Learning Units</li> <li>• Writing Journals</li> <li>• Teacher Read Alouds</li> </ul> <p>Kindergarten- iReady Diagnostic Assessment Core:</p> <ul style="list-style-type: none"> <li>• Expeditionary Learning via Learn Zillion</li> </ul> <p>Supplemental:</p> <ul style="list-style-type: none"> <li>• Phonemic Awareness by Michael Heggerty</li> <li>• Nancy Fetzer Reading and Writing Strategies</li> <li>• Rigby, Scholastic, Decodables and Booksource Leveled Readers</li> <li>• Project Based Learning Units</li> <li>• Writing journals</li> <li>• Teacher Read Alouds</li> <li>• iPad applications such as Epic</li> <li>• Calkins Units of Study in Writing</li> </ul> <p>Grades 1-8: iReady Diagnostic Assessment Core: Expeditionary Learning via Learn Zillion Supplemental:</p> <ul style="list-style-type: none"> <li>• iReady personalized pathway</li> </ul>	Yes	0.00 %

	<ul style="list-style-type: none"> <li>• Phonemic Awareness by Michael Heggerty</li> <li>• Nancy Fetzter Reading and Writing Strategies</li> <li>• Rigby, Scholastic, Decodables and Booksource Leveled Readers</li> <li>• Project Based Learning Units</li> <li>• Writing journals</li> <li>• Teacher Read Alouds</li> <li>• iPad applications such as Epic</li> <li>• Calkins Units of Study in Writing</li> </ul>		
<b>Mathematics</b>	<p>Transitional Kindergarten- Core: Creative Curriculum Supplemental:</p> <ul style="list-style-type: none"> <li>• Math manipulatives/hands-on materials</li> <li>• Math Perspectives (Kathy Richardson)</li> </ul> <p>Kindergarten:</p> <ul style="list-style-type: none"> <li>• iReady Diagnostic Assessment</li> </ul> <p>Core:</p> <ul style="list-style-type: none"> <li>• iReady curriculum and personalized pathway</li> </ul> <p>Supplemental:</p> <ul style="list-style-type: none"> <li>• Math manipulatives/ hands-on materials</li> <li>• Math Perspectives (Kathy Richardson)</li> </ul> <p>Grades 1-8:</p> <ul style="list-style-type: none"> <li>• iReady Diagnostic Assessment</li> </ul> <p>Core:</p> <ul style="list-style-type: none"> <li>• iReady curriculum and personalized pathway</li> </ul> <p>Supplemental:</p> <ul style="list-style-type: none"> <li>• Math manipulatives/ hands-on materials</li> <li>• Math Perspectives (Kathy Richardson)</li> </ul>	Yes	0.00 %
<b>Science</b>	<p>Transitional Kindergarten- Core: Creative Curriculum</p> <ul style="list-style-type: none"> <li>• Project Based Units</li> <li>• Generation Genius</li> <li>• Hands-on materials and experiments</li> </ul> <p>Kindergarten:</p> <ul style="list-style-type: none"> <li>• Hands-on materials and experiments</li> <li>• Generation Genius</li> <li>• Project Based Units</li> <li>• Expeditionary Learning Units</li> <li>• NGSS Standards-aligned, teacher created lessons</li> </ul> <p>Grades 1-5:</p> <ul style="list-style-type: none"> <li>• Generation Genius</li> <li>• Expeditionary Learning Units</li> <li>• Project Based Units</li> <li>• Hands-on materials and experiments</li> <li>• NGSS Standards-aligned, teacher created lessons</li> </ul> <p>Grades 6-8:</p> <ul style="list-style-type: none"> <li>• OpenSci Ed.</li> <li>• Expeditionary Learning Units</li> <li>• Project Based Units</li> <li>• Hands-on materials and experiments</li> <li>• NGSS Standards-aligned, teacher created lessons</li> </ul>	Yes	0.00 %

<b>History-Social Science</b>	Transitional Kindergarten- Core: Creative Curriculum <ul style="list-style-type: none"> <li>• Project Based Units</li> </ul> Kindergarten: <ul style="list-style-type: none"> <li>• Expeditionary Learning Units</li> <li>• Project Based Units</li> </ul> Grades 1-5: <ul style="list-style-type: none"> <li>• Expeditionary Learning Units</li> <li>• Project Based Units</li> </ul> Grade 6-8: <ul style="list-style-type: none"> <li>• Expeditionary Learning Units</li> <li>• Project Based Units</li> <li>• TCI History Alive</li> </ul>	Yes	0.00 %
<b>Foreign Language</b>	TK-8 units/Teacher Created & Sonrisas	Yes	0.00 %
<b>Health</b>	PE units/Teacher created <ul style="list-style-type: none"> <li>• standards aligned activities</li> <li>• PFT Prep</li> </ul>	Yes	0.00 %
<b>Visual and Performing Arts</b>	Grade TK-5: <ul style="list-style-type: none"> <li>• Art: Teacher created &amp; aligned to project based learning units.</li> <li>• Classroom based music w/certificated music teacher.</li> </ul> Grade 6-8: Choir, Band, Advanced Band, Drum Line, and Art available as elective and enrichment options.	Yes	0.00 %

Note: Cells with N/A values do not require data.

## School Facility Conditions and Planned Improvements

The Blue Oak Academy school site received an overall "good" rating on our recent FIT report. Construction and modernization project complete June 2024. All "fair" and "poor" ratings were addressed and corrected in modernization project completion.

**Year and month of the most recent FIT report**

January 2024

System Inspected	Rate Good	Rate Fair	Rate Poor	Repair Needed and Action Taken or Planned
<b>Systems:</b> Gas Leaks, Mechanical/HVAC, Sewer	X			
<b>Interior:</b> Interior Surfaces	X			
<b>Cleanliness:</b> Overall Cleanliness, Pest/Vermin Infestation	X			
<b>Electrical</b>	X			
<b>Restrooms/Fountains:</b> Restrooms, Sinks/ Fountains			X	

## School Facility Conditions and Planned Improvements

<b>Safety:</b> Fire Safety, Hazardous Materials		X		
<b>Structural:</b> Structural Damage, Roofs	X			
<b>External:</b> Playground/School Grounds, Windows/ Doors/Gates/Fences	X			

## Overall Facility Rate

Exemplary	Good	Fair	Poor
	X		

## B. Pupil Outcomes

### State Priority: Pupil Achievement

The SARC provides the following information relevant to the State priority: Pupil Achievement (Priority 4):

#### Statewide Assessments

(i.e., California Assessment of Student Performance and Progress [CAASPP] System includes the Smarter Balanced Summative Assessments for students in the general education population and the California Alternate Assessments [CAAs] for English language arts/literacy [ELA] and mathematics given in grades three through eight and grade eleven. Only eligible students may participate in the administration of the CAAs. CAAs items are aligned with alternate achievement standards, which are linked with the Common Core State Standards [CCSS] for students with the most significant cognitive disabilities).

The CAASPP System encompasses the following assessments and student participation requirements:

1. **Smarter Balanced Summative Assessments and CAAs for ELA** in grades three through eight and grade eleven.
2. **Smarter Balanced Summative Assessments and CAAs for mathematics** in grades three through eight and grade eleven.
3. **California Science Test (CAST) and CAAs for Science** in grades five, eight, and once in high school (i.e., grade ten, eleven, or twelve).

#### College and Career Ready

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, or career technical education sequences or programs of study.

## Percentage of Students Meeting or Exceeding the State Standard on CAASPP

This table displays CAASPP test results in ELA and mathematics for all students grades three through eight and grade eleven taking and completing a state-administered assessment.

To protect student privacy, double dashes (--) are used in the table when the cell size within a selected student population is ten or fewer.

ELA and mathematics test results include the Smarter Balanced Summative Assessment and the CAA. The “Percent Met or Exceeded” is calculated by taking the total number of students who met or exceeded the standard on the Smarter Balanced Summative Assessment plus the total number of students who met the standard (i.e., achieved Level 3–Alternate) on the CAAs divided by the total number of students who participated in both assessments.

Subject	School 2022-23	School 2023-24	District 2022-23	District 2023-24	State 2022-23	State 2023-24
<b>English Language Arts/Literacy</b> (grades 3-8 and 11)	34	36	29	31	46	47
<b>Mathematics</b> (grades 3-8 and 11)	22	19	18	20	34	35

## 2023-24 CAASPP Test Results in ELA by Student Group

This table displays CAASPP test results in ELA by student group for students grades three through eight and grade eleven taking and completing a state-administered assessment.

ELA test results include the Smarter Balanced Summative Assessment and the CAA. The “Percent Met or Exceeded” is calculated by taking the total number of students who met or exceeded the standard on the Smarter Balanced Summative Assessment plus the total number of students who met the standard (i.e., achieved Level 3–Alternate) on the CAA divided by the total number of students who participated in both assessments.

To protect student privacy, double dashes (--) are used in the table when the cell size within a selected student population is ten or fewer.

Note: The number of students tested includes all students who participated in the test whether they received a score or not; however, the number of students tested is not the number that was used to calculate the achievement level percentages. The achievement level percentages are calculated using only students who received scores.

CAASPP Student Groups	CAASPP Total Enrollment	CAASPP Number Tested	CAASPP Percent Tested	CAASPP Percent Not Tested	CAASPP Percent Met or Exceeded
<b>All Students</b>	246	244	99.19	0.81	36.07
<b>Female</b>	125	124	99.20	0.80	43.55
<b>Male</b>	120	119	99.17	0.83	27.73
<b>American Indian or Alaska Native</b>	--	--	--	--	--
<b>Asian</b>	--	--	--	--	--
<b>Black or African American</b>	--	--	--	--	--
<b>Filipino</b>	0	0	0	0	0
<b>Hispanic or Latino</b>	141	139	98.58	1.42	35.25
<b>Native Hawaiian or Pacific Islander</b>	0	0	0	0	0
<b>Two or More Races</b>	12	12	100.00	0.00	33.33



<b>White</b>	90	90	100.00	0.00	38.89
<b>English Learners</b>	26	26	100.00	0.00	0.00
<b>Foster Youth</b>	0	0	0	0	0
<b>Homeless</b>	--	--	--	--	--
<b>Military</b>	0	0	0	0	0
<b>Socioeconomically Disadvantaged</b>	107	107	100.00	0.00	23.36
<b>Students Receiving Migrant Education Services</b>	0	0	0	0	0
<b>Students with Disabilities</b>	37	37	100.00	0.00	2.70

## 2023-24 CAASPP Test Results in Math by Student Group

This table displays CAASPP test results in Math by student group for students grades three through eight and grade eleven taking and completing a state-administered assessment.

Mathematics test results include the Smarter Balanced Summative Assessment and the CAA. The “Percent Met or Exceeded” is calculated by taking the total number of students who met or exceeded the standard on the Smarter Balanced Summative Assessment plus the total number of students who met the standard (i.e., achieved Level 3–Alternate) on the CAA divided by the total number of students who participated in both assessments.

To protect student privacy, double dashes (--) are used in the table when the cell size within a selected student population is ten or fewer.

Note: The number of students tested includes all students who participated in the test whether they received a score or not; however, the number of students tested is not the number that was used to calculate the achievement level percentages. The achievement level percentages are calculated using only students who received scores.

CAASPP Student Groups	CAASPP Total Enrollment	CAASPP Number Tested	CAASPP Percent Tested	CAASPP Percent Not Tested	CAASPP Percent Met or Exceeded
<b>All Students</b>	246	244	99.19	0.81	19.26
<b>Female</b>	125	124	99.20	0.80	18.55
<b>Male</b>	120	119	99.17	0.83	19.33
<b>American Indian or Alaska Native</b>	--	--	--	--	--
<b>Asian</b>	--	--	--	--	--
<b>Black or African American</b>	--	--	--	--	--
<b>Filipino</b>	0	0	0	0	0
<b>Hispanic or Latino</b>	141	139	98.58	1.42	15.11
<b>Native Hawaiian or Pacific Islander</b>	0	0	0	0	0
<b>Two or More Races</b>	12	12	100.00	0.00	16.67
<b>White</b>	90	90	100.00	0.00	26.67
<b>English Learners</b>	26	26	100.00	0.00	0.00
<b>Foster Youth</b>	0	0	0	0	0
<b>Homeless</b>	--	--	--	--	--
<b>Military</b>	0	0	0	0	0

<b>Socioeconomically Disadvantaged</b>	107	107	100.00	0.00	13.08
<b>Students Receiving Migrant Education Services</b>	0	0	0	0	0
<b>Students with Disabilities</b>	37	37	100.00	0.00	5.41

## CAASPP Test Results in Science for All Students

This table displays the percentage of all students grades five, eight, and High School meeting or exceeding the State Standard.

Science test results include the CAST and the CAA for Science. The “Percent Met or Exceeded” is calculated by taking the total number of students who met or exceeded the standard on the CAST plus the total number of students who met the standard (i.e., achieved Level 3–Alternate) on the CAA for Science divided by the total number of students who participated in a science assessment.

To protect student privacy, double dashes (--) are used in the table when the cell size within a selected student population is ten or fewer.

The number of students tested includes all students who participated in the test whether they received a score or not; however, the number of students tested is not the number that was used to calculate the achievement level percentages. The achievement level percentages are calculated using only students who received scores.

<b>Subject</b>	<b>School 2022-23</b>	<b>School 2023-24</b>	<b>District 2022-23</b>	<b>District 2023-24</b>	<b>State 2022-23</b>	<b>State 2023-24</b>
<b>Science</b> (grades 5, 8 and high school)	29.55	32.39	4.55	0.00	30.29	30.73

## 2023-24 CAASPP Test Results in Science by Student Group

This table displays CAASPP test results in Science by student group for students grades five, eight, and High School. Double dashes (--) appear in the table when the number of students is ten or less, either because the number of students in this category is too small for statistical accuracy or to protect student privacy.

Student Group	Total Enrollment	Number Tested	Percent Tested	Percent Not Tested	Percent Met or Exceeded
<b>All Students</b>	72	71	98.61	1.39	32.39
<b>Female</b>	35	34	97.14	2.86	26.47
<b>Male</b>	36	36	100.00	0.00	36.11
<b>American Indian or Alaska Native</b>	0	0	0	0	0
<b>Asian</b>	0	0	0	0	0
<b>Black or African American</b>	0	0	0	0	0
<b>Filipino</b>	0	0	0	0	0
<b>Hispanic or Latino</b>	46	45	97.83	2.17	22.22
<b>Native Hawaiian or Pacific Islander</b>	0	0	0	0	0
<b>Two or More Races</b>	--	--	--	--	--
<b>White</b>	22	22	100.00	0.00	54.55
<b>English Learners</b>	--	--	--	--	--
<b>Foster Youth</b>	0	0	0	0	0
<b>Homeless</b>	--	--	--	--	--
<b>Military</b>	0	0	0	0	0
<b>Socioeconomically Disadvantaged</b>	32	32	100.00	0.00	21.88
<b>Students Receiving Migrant Education Services</b>	0	0	0	0	0
<b>Students with Disabilities</b>	13	13	100.00	0.00	7.69

## B. Pupil Outcomes

### State Priority: Other Pupil Outcomes

The SARC provides the following information relevant to the State priority: Other Pupil Outcomes (Priority 8): Pupil outcomes in the subject area of physical education.

#### 2023-24 California Physical Fitness Test Results

This table displays the percentage of students participating in each of the five fitness components of the California Physical Fitness Test Results. The administration of the PFT requires only participation results for these five fitness areas. Percentages are not calculated and double dashes (--) appear in the table when the number of students tested is ten or less, either because the number of students in this category is too small for statistical accuracy or to protect student privacy.

Grade Level	Component 1: Aerobic Capacity	Component 2: Abdominal Strength and Endurance	Component 3: Trunk Extensor and Strength and Flexibility	Component 4: Upper Body Strength and Endurance	Component 5: Flexibility
Grade 5	78	80		90	64
Grade 7	41	66		93	61

## C. Engagement

### State Priority: Parental Involvement

The SARC provides the following information relevant to the State priority: Parental Involvement (Priority 3): Efforts the school district makes to seek parent input in making decisions regarding the school district and at each school site.

#### 2024-25 Opportunities for Parental Involvement

At our school, we are fortunate to have an engaged parent community. We prioritize family involvement and actively invite participation through a variety of initiatives, including:

**Monthly Parent Forums with the Academies Superintendent Dr. Ball:**

Our Academies Superintendent hosts monthly parent forums via Zoom, offering both morning and evening sessions to accommodate different schedules. These forums provide families with timely updates on relevant topics and include opportunities for questions and feedback from site administrators. The sessions are widely advertised across social media platforms, and recordings are shared for those unable to attend. Additionally, families are encouraged to share their perspectives and concerns during monthly TACMO board meetings.

**School Events:**

Our school hosts a wide array of events that foster connection and learning for families including assemblies, student performances, Open House, and PTO-sponsored family nights at local restaurants. These events create opportunities for meaningful engagement between families, staff, and students.

**Parent Communication:**

Through our mass communication platform, ParentSquare, we keep families informed about upcoming events and share tools designed to support their child's learning and development at home. Parents receive timely updates, highlights of student achievements, and resources to help guide their decision-making as they support their children's growth.

**Parent-Teacher Organization (PTO):**

The Blue Oak Academy PTO is an enthusiastic group of parents dedicated to supporting our school's mission. They lead various fundraisers and community-building events throughout the year, including the Scholastic Book Fair and the Spring Festival.

**English Learner Advisory Council (ELAC):**

Our English Learner families gather four times a year to discuss opportunities for their children and provide valuable feedback

## 2024-25 Opportunities for Parental Involvement

on their needs and experiences. These meetings foster a collaborative environment that ensures our English Learner students and families feel supported.

### Volunteering Opportunities:

Parents are welcomed and encouraged to volunteer in classrooms, support field trips, and contribute to school events. Their presence and participation are vital to the success of our school community.

### Parent Representatives on the Board of Directors:

Two parents of current Blue Oak students serve on our governing board, ensuring that family perspectives are represented in decision-making processes.

### Committee and Survey Participation:

Parents also serve as representatives on organizational committees, working alongside staff on key initiatives such as charter renewal, strategic planning, and policy updates. Families are also invited to share their insights and experiences through LCAP forums and surveys, Wellness surveys and others throughout the year. This input is invaluable as we work together to create a supportive and effective learning environment for all students.

Through these efforts, we strive to foster a culture of collaboration and mutual support that benefits our students, staff, and families alike.

## 2023-24 Chronic Absenteeism by Student Group

Student Group	Cumulative Enrollment	Chronic Absenteeism Eligible Enrollment	Chronic Absenteeism Count	Chronic Absenteeism Rate
All Students	441	430	70	16.3
Female	218	216	27	12.5
Male	222	213	43	20.2
Non-Binary	--	--	--	--
American Indian or Alaska Native	--	--	--	--
Asian	--	--	--	--
Black or African American	--	--	--	--
Filipino	--	--	--	--
Hispanic or Latino	262	254	46	18.1
Native Hawaiian or Pacific Islander	--	--	--	--
Two or More Races	--	--	--	--
White	151	149	22	14.8
English Learners	48	46	9	19.6
Foster Youth	--	--	--	--
Homeless	--	--	--	--
Socioeconomically Disadvantaged	191	186	40	21.5
Students Receiving Migrant Education Services	--	--	--	--
Students with Disabilities	61	60	14	23.3

Note: To protect student privacy, double dashes (--) are used in the table when the cell size within a selected student population is ten or fewer.

### C. Engagement

#### State Priority: School Climate

The SARC provides the following information relevant to the State priority: School Climate (Priority 6):

- Pupil suspension rates;
- Pupil expulsion rates; and
- Other local measures on the sense of safety

## Suspensions and Expulsions

This table displays suspensions data.

Suspensions								
School 2021-22	School 2022-23	School 2023-24	District 2021-22	District 2022-23	District 2023-24	State 2021-22	State 2022-23	State 2023-24
3.85	2.76	2.95	3.39	3.25	2.79	3.17	3.6	3.28

This table displays expulsions data.

Expulsions								
School 2021-22	School 2022-23	School 2023-24	District 2021-22	District 2022-23	District 2023-24	State 2021-22	State 2022-23	State 2023-24
0	0	0	0	0	0	0.07	0.08	0.07

## 2023-24 Suspensions and Expulsions by Student Group

Student Group	Suspensions Rate	Expulsions Rate
All Students	2.95	0.00
Female	0.92	0.00
Male	4.95	0.00
Non-Binary	0.00	0.00
American Indian or Alaska Native	0.00	0.00
Asian	0.00	0.00
Black or African American	0.00	0.00
Filipino	0.00	0.00
Hispanic or Latino	3.82	0.00
Native Hawaiian or Pacific Islander	0.00	0.00
Two or More Races	0.00	0.00
White	1.99	0.00
English Learners	4.17	0.00
Foster Youth	0.00	0.00
Homeless	0.00	0.00
Socioeconomically Disadvantaged	3.14	0.00
Students Receiving Migrant Education Services	0.00	0.00
Students with Disabilities	6.56	0.00

Note: To protect student privacy, double dashes (--) are used in the table when the cell size within a selected student population is ten or fewer.

## 2024-25 School Safety Plan

Blue Oak Academy is committed to ensuring the safety and well-being of all students, staff, and visitors on campus. Our fully compliant School Safety Plan, which is reviewed and approved by the board annually, reflects our dedication to maintaining a secure and prepared school environment.

## 2024-25 School Safety Plan

Staff members receive comprehensive safety training throughout the year, including annual reviews during staff development meetings. These sessions cover essential procedures for common incidents, such as fire drills, earthquakes, and lockdowns. Students participate in regularly scheduled safety drills to ensure they are familiar with the appropriate responses to emergencies. Fire drills are conducted monthly, while earthquake/drop, cover, shelter-in-place, and lockdown drills are held three times per year, in compliance with state law.

The Blue Oak Academy School Safety Plan addresses a wide range of potential emergencies, including lockdowns, campus disturbances, active shooters, threatening intruders, hostage situations, fire/explosions, bomb threats, floods, earthquakes, and aircraft accidents.

Our plan includes:

- Detailed campus maps with clearly marked safe escape routes, emergency shut-off locations, and two designated emergency command center setups.

- A visual Incident Command Structure, outlining staff roles and emergency response teams.

- A buddy teacher system for emergency coordination.

- A student release plan with required forms and procedures to ensure a smooth reunification process.

Additionally, the safety plan includes an assessment of current strategies to address physical safety, school climate, youth development, legal compliance, and partnerships with community organizations.

At Blue Oak Academy, we understand that a safe and prepared environment is essential for fostering student growth and academic success. By prioritizing safety, we provide a secure space where students, staff, and families can focus on learning and thriving every day.

## D. Other SARC Information Information Required in the SARC

The information in this section is required to be in the SARC but is not included in the state priorities for LCFF.

## 2021-22 Elementary Average Class Size and Class Size Distribution

This table displays the 2021-22 average class size and class size distribution. The columns titled “Number of Classes” indicates how many classes fall into each size category (a range of total students per class). The “Other” category is for multi-grade level classes.

Grade Level	Average Class Size	Number of Classes with 1-20 Students	Number of Classes with 21-32 Students	Number of Classes with 33+ Students
K	19	2	1	
1	14	3		
2	14	3		
3	13	3		
4	14	3		
5	13	3		
6	16	3		
Other	7	1		



## 2022-23 Elementary Average Class Size and Class Size Distribution

This table displays the 2022-23 average class size and class size distribution. The columns titled “Number of Classes” indicates how many classes fall into each size category (a range of total students per class). The “Other” category is for multi-grade level classes.

Grade Level	Average Class Size	Number of Classes with 1-20 Students	Number of Classes with 21-32 Students	Number of Classes with 33+ Students
K	21	1	2	
1	21		2	
2	21	1	1	
3	21	1	1	
4	19	1	1	
5	22	1	1	
6	19	1	1	

## 2023-24 Elementary Average Class Size and Class Size Distribution

This table displays the 2023-24 average class size and class size distribution. The columns titled “Number of Classes” indicates how many classes fall into each size category (a range of total students per class). The “Other” category is for multi-grade level classes.

Grade Level	Average Class Size	Number of Classes with 1-20 Students	Number of Classes with 21-32 Students	Number of Classes with 33+ Students
K	23		2	
1	22		2	
2	14		3	
3	15		3	
4	14		3	
5	13		3	
6	28		2	

## 2023-24 Ratio of Pupils to Academic Counselor

This table displays the ratio of pupils to Academic Counselor. One Full Time Equivalent (FTE) equals one staff member working full time; one FTE could also represent two staff members who each work 50 percent of full time.

Title	Ratio
Pupils to Academic Counselor	0

## 2023-24 Student Support Services Staff

This table displays the number of FTE support staff assigned to this school. One Full Time Equivalent (FTE) equals one staff member working full time; one FTE could also represent two staff members who each work 50 percent of full time. The "Other" category is for all other student support services staff positions not listed.

Title	Number of FTE Assigned to School
<b>Counselor (Academic, Social/Behavioral or Career Development)</b>	
<b>Library Media Teacher (Librarian)</b>	
<b>Library Media Services Staff (Paraprofessional)</b>	
<b>Psychologist</b>	0.5
<b>Social Worker</b>	0.5
<b>Nurse</b>	0.25
<b>Speech/Language/Hearing Specialist</b>	
<b>Resource Specialist (non-teaching)</b>	
<b>Other</b>	

## Fiscal Year 2022-23 Expenditures Per Pupil and School Site Teacher Salaries

This table displays the 2022-23 expenditures per pupil and average teacher salary for this school. Cells with N/A values do not require data.

Level	Total Expenditures Per Pupil	Expenditures Per Pupil (Restricted)	Expenditures Per Pupil (Unrestricted)	Average Teacher Salary
<b>School Site</b>	12,121	2,577	9,544	81,024
<b>District</b>	N/A	N/A	9,544	
<b>Percent Difference - School Site and District</b>	N/A	N/A	0.0	
<b>State</b>	N/A	N/A	\$10,771	
<b>Percent Difference - School Site and State</b>	N/A	N/A	-12.1	

## Fiscal Year 2023-24 Types of Services Funded

Blue Oak Academy offers English Language Arts, Mathematics, History, Art, Spanish, Project-Based Learning, Social-Emotional learning, Service-Learning, Science, STEAM, Music, and PE courses to our students.

## Fiscal Year 2022-23 Teacher and Administrative Salaries

This table displays the 2022-23 Teacher and Administrative salaries. For detailed information on salaries, see the CDE Certification Salaries & Benefits web page at <http://www.cde.ca.gov/ds/fd/cs/>.

Category	District Amount	State Average for Districts in Same Category
<b>Beginning Teacher Salary</b>	63722	39789
<b>Mid-Range Teacher Salary</b>	74078	87825
<b>Highest Teacher Salary</b>	99172	135860
<b>Average Principal Salary (Elementary)</b>	120000	
<b>Average Principal Salary (Middle)</b>		
<b>Average Principal Salary (High)</b>		
<b>Superintendent Salary</b>	171000	
<b>Percent of Budget for Teacher Salaries</b>	40	
<b>Percent of Budget for Administrative Salaries</b>	5	

## Professional Development

At Blue Oak Academy, professional development is thoughtfully designed to enhance instructional practices and support student growth across all grade levels. Teachers engage in ongoing training to implement accelerated learning strategies in both Mathematics and English Language Arts, ensuring that all students, including those needing additional challenges, can thrive academically. This professional development is facilitated by consultants from the Tulare County Office of Education (TCOE), providing staff with expert guidance and cutting-edge strategies to ensure instructional excellence.

This table displays the number of school days dedicated to staff development and continuous improvement.

Subject	2022-23	2023-24	2024-25
<b>Number of school days dedicated to Staff Development and Continuous Improvement</b>	5	5	

# Sycamore Valley Academy

## 2023-2024 School Accountability Report Card (Published During the 2024-2025 School Year)



### General Information about the School Accountability Report Card (SARC)

#### SARC Overview



By February 1 of each year, every school in California is required by state law to publish a School Accountability Report Card (SARC). The SARC contains information about the condition and performance of each California public school. Under the Local Control Funding Formula (LCFF) all local educational agencies (LEAs) are required to prepare a Local Control and Accountability Plan (LCAP), which describes how they intend to meet annual school-specific goals for all pupils, with specific activities to address state and local priorities. Additionally, data reported in an LCAP is to be consistent with data reported in the SARC.

- For more information about SARC requirements and access to prior year reports, see the California Department of Education (CDE) SARC web page at <https://www.cde.ca.gov/ta/ac/sa/>.
- For more information about the LCFF or the LCAP, see the CDE LCFF web page at <https://www.cde.ca.gov/fg/aa/lc/>.
- For additional information about the school, parents/guardians and community members should contact the school principal or the district office.

A hard copy of the School Accountability Report Card is available at your School Office, upon request.

#### DataQuest



DataQuest is an online data tool located on the CDE DataQuest web page at <https://dq.cde.ca.gov/dataquest/> that contains additional information about this school and comparisons of the school to the district and the county. Specifically, DataQuest is a dynamic system that provides reports for accountability (e.g., test data, enrollment, high school graduates, dropouts, course enrollments, staffing, and data regarding English learners).

#### California School Dashboard



The California School Dashboard (Dashboard) <https://www.caschooldashboard.org/> reflects California's new accountability and continuous improvement system and provides information about how LEAs and schools are meeting the needs of California's diverse student population. The Dashboard contains reports that display the performance of LEAs, schools, and student groups on a set of state and local measures to assist in identifying strengths, challenges, and areas in need of improvement.

#### Internet Access

Internet access is available at public libraries and other locations that are publicly accessible (e.g., the California State Library). Access to the Internet at libraries and public locations is generally provided on a first-come, first-served basis. Other use restrictions may include the hours of operation, the length of time that a workstation may be used (depending on availability), the types of software programs available on a workstation, and the ability to print documents.

### Admission Requirements for the University of California (UC)

Admission requirements for the UC follow guidelines set forth in the Master Plan, which requires that the top one-eighth of the state's high school graduates, as well as those transfer students who have successfully completed specified college course work, be eligible for admission to the UC. These requirements are designed to ensure that all eligible students are adequately prepared for University-level work. For general admissions requirements, please visit the UC Admissions Information website at <https://admission.universityofcalifornia.edu/>.

### Admission Requirements for the California State University (CSU)

Eligibility for admission to the CSU is determined by three factors: (1) Specific high school courses, (2) Grades in specified courses and test scores, and (3) Graduation from high school. Some campuses have higher standards for particular majors or students who live outside the local campus area. Because of the number of students who apply, a few campuses have higher standards (supplementary admission criteria) for all applicants. Most CSU campuses have local admission guarantee policies for students who graduate or transfer from high schools and colleges that are historically served by a CSU campus in that region. For admission, application, and fee information, see the CSU website at <https://www2.calstate.edu/>.

## 2024-25 School Contact Information

<b>School Name</b>	Sycamore Valley Academy
<b>Street</b>	6832 Avenue 280
<b>City, State, Zip</b>	Visalia, CA 93277
<b>Phone Number</b>	559.622.3236
<b>Principal</b>	Corey Morse
<b>Email Address</b>	cmorse@sycamorevalleyacademy.org
<b>School Website</b>	sycamorevalleyacademy.org
<b>Grade Span</b>	K-8
<b>County-District-School (CDS) Code</b>	54722560125542

## 2024-25 District Contact Information

<b>District Name</b>	Sycamore Valley Academy
<b>Phone Number</b>	(559) 429-4351
<b>Superintendent</b>	Donya Ball
<b>Email Address</b>	dball@theacademiescharters.org
<b>District Website</b>	www.sycamorevalleyacademy.org

## 2024-25 School Description and Mission Statement

Sycamore Valley Academy (SVA) is a tuition-free, TK-8 Visalia charter school that opened in August 2012.

The MISSION of our school is to provide a rich, meaningful education in a nurturing environment, where students are continually challenged and their natural curiosity, creativity, and talents can thrive. We are a collaborative community of educators and families working together to help our students grow into virtuous, courageous, and intelligent citizens, equipped with a love of learning and a love of life, and eager to contribute to a better world.

## 2024-25 School Description and Mission Statement

Our VISION: The Academies' charter schools model transformative change in education by elevating expectations of learning and growth. With grit, tenacity, and empathy, we improve the world around us by embracing challenges as problem-solvers. We create an inclusive community with access to rigorous and enriching educational experiences that challenge and support individuals to achieve their personal best and realize new opportunities.

### LEARNING OUTCOMES:

As a result of receiving their K-8 education with us, our alumni will be...

- Inquisitive & Critical Thinkers
- Virtuous, Courageous & Intelligent Individuals
- Self-motivated, Life-long Learners
- Confident Leaders for the 21st Century
- Creative & Effective Problem Solvers
- Empowered Citizens in a Democratic Society

To achieve these desired learning outcomes, we borrow and merge the best ideas from well-respected educational traditions like Constructivism (including influences such as DeVries, Dewey, Froebel, Montessori, and Steiner) and the Classical Education Model.

We offer a site-based, academically accelerated instructional program with thematic units, project-based learning, and an enriched curriculum (including Spanish language, hands-on science, service-learning, music, and art instruction) to support students who have the desire to work ahead or work deeper in their studies. Our constructivist educational philosophy and program for gifted learners make our school unique in the area.

### About Our School

Sycamore Valley Academy is a special community of educators and parents working together to provide our students with an excellent TK-8 education. It's my pleasure to be the Principal of this school and to share with you some information on our core beliefs and assumptions, and share with you how these shape our school's instructional program.

First, we believe children find the greatest benefit in their formal education when they are empowered, active participants--students in an environment that responds to their interests, their questions, and their desire to define the world around them. We provide an enriching learning environment (a school with academic breadth, constructivist--hands-on, collaborative--teaching methods, and a whole-child approach). Because of this, Sycamore Valley Academy's motto is, "Accelerating Academics in an Enriching Environment." Here, students grow at their natural pace and their talents and creativity thrive because our school provides an environment conducive to learning. Since children acquire knowledge and master concepts at varying rates, we work to adjust instructional pacing to keep our students motivated, challenged, and always interested. Students here receive differentiated instruction (are kept challenged). In addition, we know that students are able to show their learning in myriad ways. Our school believes in "authentic assessment," which means learning is assessed in multiple ways (from quizzes and tests to performances, projects, and portfolios), giving students varying ways to demonstrate and apply their learning.

We believe that how we teach is just as important as what we teach. Our school understands that as the body of information grows at an exponential rate, our highest purpose in education is to develop habits of mind that enable students to become independent learners: to learn how to learn. This means we employ a variety of lesson types, from traditional direct instruction to inquiry-based lessons where students are guided to discover the concept/idea themselves.

Our school not only facilitates the child's mastery of the essential disciplines, but also provides students with the chance to pursue their particular passions through in-depth studies, projects, and collaboration. Sycamore Valley Academy broadens the school experience to include an enriched curriculum that engages, spurs deeper connection-making, and creates greater opportunities for acceleration. Our students nurture a range of higher-level thinking skills while building meaningful relationships with each other and our caring, passionate staff. Our enriched curriculum includes the Spanish language (with a Spanish specialist), hands-on Science learning (with a Science specialist), art (with an art specialist), music, social-emotional learning, project-based learning, thematic learning, Physical Education (with a PE specialist), and history/social studies. In addition to these, older students in grades 6-8 have the option to select an additional elective course.

Sycamore Valley Academy believes students should be educated in matters of the heart as well as the mind. In addition to our rigorous academic program, a Sycamore Valley Academy education reaches beyond the walls of the classroom through community service. We teach our students to recognize their needs and to mobilize their resources of intellect, compassion, and altruistic action to better the world they live in. Through their learning at Sycamore Valley Academy, our students are

## 2024-25 School Description and Mission Statement

equipped to reach their fullest potential, amplify their talents, and improve their world. Visit our school website to learn more!  
[www.sycamorevalleyacademy.org](http://www.sycamorevalleyacademy.org)

## About this School

### 2023-24 Student Enrollment by Grade Level

Grade Level	Number of Students
Kindergarten	63
Grade 1	44
Grade 2	44
Grade 3	43
Grade 4	46
Grade 5	43
Grade 6	43
Grade 7	45
Grade 8	38
Total Enrollment	409

### 2023-24 Student Enrollment by Student Group

Student Group	Percent of Total Enrollment
Female	52.7
Male	47.3
American Indian or Alaska Native	0.2
Asian	1.2
Black or African American	0.5
Filipino	0.7
Hispanic or Latino	52.7
Two or More Races	4.6
White	36.6
English Learners	5.1
Homeless	0.5
Socioeconomically Disadvantaged	36.3
Students with Disabilities	14.6

## A. Conditions of Learning **State Priority: Basic**

The SARC provides the following information relevant to the State priority: Basic (Priority 1):

- Degree to which teachers are appropriately assigned and fully credentialed in the subject area and for the pupils they are teaching;
- Pupils have access to standards-aligned instructional materials; and
- School facilities are maintained in good repair.



## 2020-21 Teacher Preparation and Placement

Authorization/Assignment	School Number	School Percent	District Number	District Percent	State Number	State Percent
<b>Fully (Preliminary or Clear) Credentialed for Subject and Student Placement (properly assigned)</b>	12.80	78.53	120.70	60.54	228366.10	83.12
<b>Intern Credential Holders Properly Assigned</b>	1.00	6.13	10.30	5.21	4205.90	1.53
<b>Teachers Without Credentials and Misassignments (“ineffective” under ESSA)</b>	0.50	3.07	8.30	4.19	11216.70	4.08
<b>Credentialed Teachers Assigned Out-of-Field (“out-of-field” under ESSA)</b>	1.00	6.13	22.30	11.20	12115.80	4.41
<b>Unknown/Incomplete/NA</b>	1.00	6.13	37.50	18.85	18854.30	6.86
<b>Total Teaching Positions</b>	16.30	100.00	199.30	100.00	274759.10	100.00

Note: The data in this table is based on full-time equivalent (FTE) status. One FTE equals one staff member working full-time; one FTE could also represent two staff members who each work 50 percent of full-time. Additionally, an assignment is defined as a position that an educator is assigned based on setting, subject, and grade level. An authorization is defined as the services that an educator is authorized to provide to students.

## 2021-22 Teacher Preparation and Placement

Authorization/Assignment	School Number	School Percent	District Number	District Percent	State Number	State Percent
<b>Fully (Preliminary or Clear) Credentialed for Subject and Student Placement (properly assigned)</b>	15.00	71.52	173.80	67.18	234405.20	84.00
<b>Intern Credential Holders Properly Assigned</b>	2.00	9.48	17.10	6.64	4853.00	1.74
<b>Teachers Without Credentials and Misassignments (“ineffective” under ESSA)</b>	2.00	9.48	16.00	6.20	12001.50	4.30
<b>Credentialed Teachers Assigned Out-of-Field (“out-of-field” under ESSA)</b>	0.00	0.00	7.40	2.89	11953.10	4.28
<b>Unknown/Incomplete/NA</b>	2.00	9.48	44.10	17.08	15831.90	5.67
<b>Total Teaching Positions</b>	21.10	100.00	258.70	100.00	279044.80	100.00

Note: The data in this table is based on Full-Time Equivalent (FTE) status. One FTE equals one staff member working full time; one FTE could also represent two staff members who each work 50 percent of full time. Additionally, an assignment is defined as a position that an educator is assigned based on setting, subject, and grade level. An authorization is defined as the services that an educator is authorized to provide to students.

## 2022-23 Teacher Preparation and Placement

Authorization/Assignment	School Number	School Percent	District Number	District Percent	State Number	State Percent
<b>Fully (Preliminary or Clear) Credentialed for Subject and Student Placement (properly assigned)</b>	13.60	64.22	169.90	65.02	231142.40	100.00
<b>Intern Credential Holders Properly Assigned</b>	5.00	23.54	23.70	9.09	5566.40	2.00
<b>Teachers Without Credentials and Misassignments (“ineffective” under ESSA)</b>	2.60	12.24	17.00	6.53	14938.30	5.38
<b>Credentialed Teachers Assigned Out-of-Field (“out-of-field” under ESSA)</b>	0.00	0.00	4.40	1.69	11746.90	4.23
<b>Unknown/Incomplete/NA</b>	0.00	0.00	46.10	17.67	14303.80	5.15
<b>Total Teaching Positions</b>	21.20	100.00	261.30	100.00	277698	100

Note: The data in this table is based on Full-Time Equivalent (FTE) status. One FTE equals one staff member working full time; one FTE could also represent two staff members who each work 50 percent of full time. Additionally, an assignment is defined as a position that an educator is assigned based on setting, subject, and grade level. An authorization is defined as the services that an educator is authorized to provide to students.

## Teachers Without Credentials and Misassignments (considered “ineffective” under ESSA)

Authorization/Assignment	2020-21	2021-22	2022-23
<b>Permits and Waivers</b>	0.00	1.00	0
<b>Misassignments</b>	0.50	1.00	2.6
<b>Vacant Positions</b>	0.00	0.00	0
<b>Total Teachers Without Credentials and</b>	0.50	2.00	2.6

## Credentialed Teachers Assigned Out-of-Field (considered “out-of-field” under ESSA)

Indicator	2020-21	2021-22	2022-23
<b>Credentialed Teachers Authorized on a Permit or Waiver</b>	1.00	0.00	0
<b>Local Assignment Options</b>	0.00	0.00	0
<b>Total Out-of-Field Teachers</b>	1.00	0.00	0

## Class Assignments

Indicator	2020-21	2021-22	2022-23
<b>Misassignments for English Learners</b> (a percentage of all the classes with English learners taught by teachers that are misassigned)	0.00	0	12.5
<b>No credential, permit or authorization to teach</b> (a percentage of all the classes taught by teachers with no record of an authorization to teach)	6.40	0	0

Note: For more information refer to the Updated Teacher Equity Definitions web page at <https://www.cde.ca.gov/pd/ee/teacherequitydefinitions.asp>.

## 2024-25 Quality, Currency, Availability of Textbooks and Other Instructional Materials

Year and month in which the data were collected: November 2024

Subject	Textbooks and Other Instructional Materials/year of Adoption	From Most Recent Adoption ?	Percent Students Lacking Own Assigned Copy
<b>Reading/Language Arts</b>	Kindergarten Tara West Science of Reading Guided Phonics Booksource and Rigby Leveled Readers Tara West KinderLiteracy Expeditionary Learning Reading Modules Teacher Read Aloud iReady MyPath Personalized Learning Tara West Kinder Writing Writing journals Phonemic Awareness by Michael Heggerty Secret Stories  Tara West Guided Phonics Assessments i-Ready Diagnostic Assessment 1:1 Teacher Assessments Tulare County Office of Education Writing Rubrics  Grade 1 Tara West Science of Reading Guided Phonics Leveled Readers/Lit Circle Book Sets Tara West Firstie Literature Modules Secret Stories Word Sorts Teacher Read Aloud iReady MyPath Personalized Learning EPIC (literacy app/website) Poetry PBL Resources Tara West Firstie Writing Units Phonemic Awareness by Michael Heggerty Secret Stories  Tara West Guided Phonics Assessments	Yes	0.00 %

	<p>i-Ready Diagnostic Assessment Scholastic 3 Minute Assessments Tulare County Office of Education Writing Rubrics</p> <p>Grades 2-3 Tara West Science of Reading Guided Phonics iReady MyPath Personalized Learning iReady Reading Resources for Small Groups Teacher Read Aloud Whole Class Novels Words Their Way Word Sorts Mentor Sentences Not So Wimpy Teacher Writing Units People Who Make a Difference (integrated into PBL Units) Phonemic Awareness by Michael Heggerty Secret Stories</p> <p>Tara West Guided Phonics Assessments i-Ready diagnostic assessment Scholastic 3 Minute Assessment Tulare County Office of Education Writing Rubrics</p> <p>Grades 4-5 Teacher Read Aloud- Bud Not Buddy, Sign of the Beaver, King George What Was His Problem, and Esperanza Rising. Expeditionary Learning Reading Modules iReady MyPath Personalized Learning iReady Reading Resources for Small Groups Writing: Lucy Calkins Units of Study/Teacher Created Units Secret Stories</p> <p>i-Ready Diagnostic Assessment Scholastic 3 Minute Reading Assessments Tulare County Office of Education Writing Rubrics</p> <p>Grades 6-7-8 Novel Studies with Teacher Created Curriculum Lucy Calkins Units of Study in Writing iReady MyPath Personalized Learning</p> <p>i-Ready Diagnostic Assessment Scholastic 3 Minute Assessment Tulare County Office of Education Writing Rubrics</p>		
<p><b>Mathematics</b></p>	<p>Kindergarten- Grade 5 i-Ready Core Math Bridges Number Corner Math manipulatives/ hands-on materials Children's Mathematics- CGI i-Ready My Path Personalized Learning platform</p> <p>i-Ready Diagnostic Assessment I-Ready Unit Assessments 1:1 Teacher Assessments (Kindergarten)</p> <p>Grades 6-8 i-Ready Core Math i-Ready MyPath personalized learning platform Bootstrap Algebra Computer Science and Math curriculum</p>	<p>Yes</p>	<p>0.00 %</p>

	<p>Acellus Math Edgenuity Math</p> <p>i-Ready diagnostic assessment i-Ready Unit Assessments</p>		
<b>Science</b>	<p>Kindergarten- Grade 1 Mystery Science Hands-on materials and experiments Websites NGSS Standards-aligned, teacher-created lessons</p> <p>Grades 2-5 Mystery Science National Geographic website (and other web-based sources) Hands-on materials NGSS Standards-aligned, teacher-created lessons</p> <p>Grades 6-8 Project-based Inquiry Science from It's About Time Publishers, New York NGSS Standards-aligned, teacher-created lessons Development &amp; Sexual Health: Planned Parenthood curriculum &amp; instructors</p>	Yes	0.00 %
<b>History-Social Science</b>	<p>Kindergarten Patriotic Songs American Symbols Rules/Procedures Community Helpers/Jobs People Do Holidays and Heroes PBL: Why Trees Are Important to our Community and How Can We Convince Others to Enjoy and Appreciate Trees</p> <p>Grade 1 Little Social Studies Thinkers</p> <p>Grades 2-3 People Who Make a Difference- Family History, Heroes, Economics (2nd grade) Local History (3rd Grade), Visalia, Native Americans, Tulare County</p> <p>Grades 4-5 Looping: California History, American History Grade 4: California: A Changing State Grade 5: Social Studies Alive: America's Past</p> <p>Grades 6-8 TCI History Alive Curriculum Stanford Education Group: Reading Like a Historian, Beyond the Bubble, Civic Online Reasoning Howard Zinn Education Project A Young People's History of the United States-Howard Zinn A Different Mirror: A Young People's History of Multicultural America- Ronald Takaki</p>	Yes	0.00 %

	Various Museum Resources		
<b>Foreign Language</b>	Spanish Grades K-8 Variety of Picture Books and literature in Spanish Rockalingua Sonrisas 1 & 2 Duolingo	Yes	0.00 %
<b>Health</b>	1-8 Sparks PE units/Teacher created, standards-aligned activities, PFT Prep	Yes	0.00 %
<b>Visual and Performing Arts</b>	Art: Deep Space Sparkle  Curricular supplies for band, choir, and classroom music 1. Instruments  Recorders  Ukuleles  Acoustic guitars  Percussive instruments:  Hand drums  Hand percussion  Electronic instruments:  Samplers  Field recording microphones  2. Educational Tools and Materials  Chromebooks  Music books  Music learning card games (for classroom stations)  3. Engagement Resources  Boomwhackers  Jump bands  Drumsticks  Colorful scarves	Yes	0.00 %

Note: Cells with N/A values do not require data.

## School Facility Conditions and Planned Improvements

Sycamore Valley Academy facilities are rated as "fair" in its latest Facility Inspection Tool report. Systems, cleanliness, restrooms/fountains, safety, structural, and external are rated as "good".

Year and month of the most recent FIT report

January 2024

System Inspected	Rate Good	Rate Fair	Rate Poor	Repair Needed and Action Taken or Planned
<b>Systems:</b> Gas Leaks, Mechanical/HVAC, Sewer	X			None
<b>Interior:</b> Interior Surfaces			X	None
<b>Cleanliness:</b> Overall Cleanliness, Pest/Vermin Infestation	X			None
<b>Electrical</b>			X	None
<b>Restrooms/Fountains:</b> Restrooms, Sinks/ Fountains			X	None
<b>Safety:</b> Fire Safety, Hazardous Materials	X			None
<b>Structural:</b> Structural Damage, Roofs	X			None
<b>External:</b> Playground/School Grounds, Windows/ Doors/Gates/Fences		X		None

## Overall Facility Rate

Exemplary	Good	Fair	Poor
		X	

## B. Pupil Outcomes

### State Priority: Pupil Achievement

The SARC provides the following information relevant to the State priority: Pupil Achievement (Priority 4):

#### Statewide Assessments

(i.e., California Assessment of Student Performance and Progress [CAASPP] System includes the Smarter Balanced Summative Assessments for students in the general education population and the California Alternate Assessments [CAAs] for English language arts/literacy [ELA] and mathematics given in grades three through eight and grade eleven. Only eligible students may participate in the administration of the CAAs. CAAs items are aligned with alternate achievement standards, which are linked with the Common Core State Standards [CCSS] for students with the most significant cognitive disabilities).

The CAASPP System encompasses the following assessments and student participation requirements:

1. **Smarter Balanced Summative Assessments and CAAs for ELA** in grades three through eight and grade eleven.
2. **Smarter Balanced Summative Assessments and CAAs for mathematics** in grades three through eight and grade eleven.
3. **California Science Test (CAST) and CAAs for Science** in grades five, eight, and once in high school (i.e., grade ten, eleven, or twelve).

#### College and Career Ready

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, or career technical education sequences or programs of study.

### Percentage of Students Meeting or Exceeding the State Standard on CAASPP

This table displays CAASPP test results in ELA and mathematics for all students grades three through eight and grade eleven taking and completing a state-administered assessment.

To protect student privacy, double dashes (--) are used in the table when the cell size within a selected student population is ten or fewer.

ELA and mathematics test results include the Smarter Balanced Summative Assessment and the CAA. The “Percent Met or Exceeded” is calculated by taking the total number of students who met or exceeded the standard on the Smarter Balanced Summative Assessment plus the total number of students who met the standard (i.e., achieved Level 3-Alternate) on the CAAs divided by the total number of students who participated in both assessments.

Subject	School 2022-23	School 2023-24	District 2022-23	District 2023-24	State 2022-23	State 2023-24
<b>English Language Arts/Literacy</b> (grades 3-8 and 11)	40	42	29	31	46	47
<b>Mathematics</b> (grades 3-8 and 11)	28	32	18	20	34	35

### 2023-24 CAASPP Test Results in ELA by Student Group

This table displays CAASPP test results in ELA by student group for students grades three through eight and grade eleven taking and completing a state-administered assessment.

ELA test results include the Smarter Balanced Summative Assessment and the CAA. The “Percent Met or Exceeded” is calculated by taking the total number of students who met or exceeded the standard on the Smarter Balanced Summative Assessment plus



the total number of students who met the standard (i.e., achieved Level 3–Alternate) on the CAA divided by the total number of students who participated in both assessments.

To protect student privacy, double dashes (--) are used in the table when the cell size within a selected student population is ten or fewer.

Note: The number of students tested includes all students who participated in the test whether they received a score or not; however, the number of students tested is not the number that was used to calculate the achievement level percentages. The achievement level percentages are calculated using only students who received scores.

CAASPP Student Groups	CAASPP Total Enrollment	CAASPP Number Tested	CAASPP Percent Tested	CAASPP Percent Not Tested	CAASPP Percent Met or Exceeded
All Students	258	249	96.51	3.49	41.77
Female	130	125	96.15	3.85	45.60
Male	128	124	96.88	3.12	37.90
American Indian or Alaska Native	--	--	--	--	--
Asian	--	--	--	--	--
Black or African American	--	--	--	--	--
Filipino	--	--	--	--	--
Hispanic or Latino	134	129	96.27	3.73	37.21
Native Hawaiian or Pacific Islander	0	0	0	0	0
Two or More Races	21	20	95.24	4.76	35.00
White	97	94	96.91	3.09	47.87
English Learners	--	--	--	--	--
Foster Youth	0	0	0	0	0
Homeless	--	--	--	--	--
Military	--	--	--	--	--
Socioeconomically Disadvantaged	98	92	93.88	6.12	30.43
Students Receiving Migrant Education Services	0	0	0	0	0
Students with Disabilities	52	48	92.31	7.69	2.08

## 2023-24 CAASPP Test Results in Math by Student Group

This table displays CAASPP test results in Math by student group for students grades three through eight and grade eleven taking and completing a state-administered assessment.

Mathematics test results include the Smarter Balanced Summative Assessment and the CAA. The “Percent Met or Exceeded” is calculated by taking the total number of students who met or exceeded the standard on the Smarter Balanced Summative Assessment plus the total number of students who met the standard (i.e., achieved Level 3–Alternate) on the CAA divided by the total number of students who participated in both assessments.

To protect student privacy, double dashes (--) are used in the table when the cell size within a selected student population is ten or fewer.

Note: The number of students tested includes all students who participated in the test whether they received a score or not; however, the number of students tested is not the number that was used to calculate the achievement level percentages. The achievement level percentages are calculated using only students who received scores.

CAASPP Student Groups	CAASPP Total Enrollment	CAASPP Number Tested	CAASPP Percent Tested	CAASPP Percent Not Tested	CAASPP Percent Met or Exceeded
<b>All Students</b>	258	252	97.67	2.33	32.14
<b>Female</b>	130	127	97.69	2.31	34.65
<b>Male</b>	128	125	97.66	2.34	29.60
<b>American Indian or Alaska Native</b>	--	--	--	--	--
<b>Asian</b>	--	--	--	--	--
<b>Black or African American</b>	--	--	--	--	--
<b>Filipino</b>	--	--	--	--	--
<b>Hispanic or Latino</b>	134	130	97.01	2.99	30.77
<b>Native Hawaiian or Pacific Islander</b>	0	0	0	0	0
<b>Two or More Races</b>	21	20	95.24	4.76	20.00
<b>White</b>	97	96	98.97	1.03	36.46
<b>English Learners</b>	--	--	--	--	--
<b>Foster Youth</b>	0	0	0	0	0
<b>Homeless</b>	--	--	--	--	--
<b>Military</b>	--	--	--	--	--
<b>Socioeconomically Disadvantaged</b>	98	93	94.90	5.10	17.20
<b>Students Receiving Migrant Education Services</b>	0	0	0	0	0
<b>Students with Disabilities</b>	52	50	96.15	3.85	0.00

## CAASPP Test Results in Science for All Students

This table displays the percentage of all students grades five, eight, and High School meeting or exceeding the State Standard.

Science test results include the CAST and the CAA for Science. The “Percent Met or Exceeded” is calculated by taking the total number of students who met or exceeded the standard on the CAST plus the total number of students who met the standard (i.e., achieved Level 3–Alternate) on the CAA for Science divided by the total number of students who participated in a science assessment.

To protect student privacy, double dashes (--) are used in the table when the cell size within a selected student population is ten or fewer.

The number of students tested includes all students who participated in the test whether they received a score or not; however, the number of students tested is not the number that was used to calculate the achievement level percentages. The achievement level percentages are calculated using only students who received scores.

Subject	School 2022-23	School 2023-24	District 2022-23	District 2023-24	State 2022-23	State 2023-24
<b>Science</b> (grades 5, 8 and high school)	39.19	35.80	4.55	0.00	30.29	30.73

## 2023-24 CAASPP Test Results in Science by Student Group

This table displays CAASPP test results in Science by student group for students grades five, eight, and High School. Double dashes (--) appear in the table when the number of students is ten or less, either because the number of students in this category is too small for statistical accuracy or to protect student privacy.

Student Group	Total Enrollment	Number Tested	Percent Tested	Percent Not Tested	Percent Met or Exceeded
<b>All Students</b>	81	81	100.00	0.00	35.80
<b>Female</b>	36	36	100.00	0.00	44.44
<b>Male</b>	45	45	100.00	0.00	28.89
<b>American Indian or Alaska Native</b>	--	--	--	--	--
<b>Asian</b>	--	--	--	--	--
<b>Black or African American</b>	0	0	0	0	0
<b>Filipino</b>	--	--	--	--	--
<b>Hispanic or Latino</b>	38	38	100.00	0.00	31.58
<b>Native Hawaiian or Pacific Islander</b>	0	0	0	0	0
<b>Two or More Races</b>	--	--	--	--	--
<b>White</b>	34	34	100.00	0.00	44.12
<b>English Learners</b>	--	--	--	--	--
<b>Foster Youth</b>	0	0	0	0	0
<b>Homeless</b>	--	--	--	--	--
<b>Military</b>	0	0	0	0	0
<b>Socioeconomically Disadvantaged</b>	31	31	100.00	0.00	22.58
<b>Students Receiving Migrant Education Services</b>	0	0	0	0	0
<b>Students with Disabilities</b>	19	19	100.00	0.00	0.00

## B. Pupil Outcomes

### State Priority: Other Pupil Outcomes

The SARC provides the following information relevant to the State priority: Other Pupil Outcomes (Priority 8): Pupil outcomes in the subject area of physical education.

#### 2023-24 California Physical Fitness Test Results

This table displays the percentage of students participating in each of the five fitness components of the California Physical Fitness Test Results. The administration of the PFT requires only participation results for these five fitness areas. Percentages are not calculated and double dashes (--) appear in the table when the number of students tested is ten or less, either because the number of students in this category is too small for statistical accuracy or to protect student privacy.

Grade Level	Component 1: Aerobic Capacity	Component 2: Abdominal Strength and Endurance	Component 3: Trunk Extensor and Strength and Flexibility	Component 4: Upper Body Strength and Endurance	Component 5: Flexibility
Grade 5	100	100	100	100	100
Grade 7	100	100	100	100	100

## C. Engagement

### State Priority: Parental Involvement

The SARC provides the following information relevant to the State priority: Parental Involvement (Priority 3): Efforts the school district makes to seek parent input in making decisions regarding the school district and at each school site.

#### 2024-25 Opportunities for Parental Involvement

Our school enjoys high parent involvement. We invite parent participation in myriad ways, including the following:

1. School Events: SVA and our Parent Teacher Organization sponsor many fun events throughout the school year, including monthly awards assemblies, musical performances (primary grade performances are 1 time per trimester) and middle school choir and band are 2 times per year, a Fall Carnival, parent's night out, field trips for every class, campus beautification days, and sports events.
2. Parent Teacher Organization (SVA PTO): The enthusiastic parents and guardians of Sycamore Valley Academy students have formed a PTO to promote the school's mission and support the staff of this school. The SVA PTO organizes and runs a Fall Carnival, a Jog-a-thon, and a Spring fundraiser event. This group meets monthly and the PTO board and subcommittees meet more frequently when working on specific projects.
4. Room Parents: Each classroom has a minimum of 1 room parent who organizes classroom parties and teacher appreciation activities.
5. Volunteering: Parents, guardians, and grandparents are invited to set up a regular time to volunteer in our classrooms or to chaperone on field trips. Parents help our staff by providing students with more attention and supervision during recess/ lunch, and more support during instructional time.
6. Parent Representative on the SVA Board of Directors: The governing board of our school always contains between 1-4 parents of current SVA students.
7. Parent Representatives serving on our organization's committees, collaborating with staff on items such as strategic planning, outreach for diversity, and policy updating.

## 2023-24 Chronic Absenteeism by Student Group

Student Group	Cumulative Enrollment	Chronic Absenteeism Eligible Enrollment	Chronic Absenteeism Count	Chronic Absenteeism Rate
All Students	422	420	72	17.1
Female	222	221	44	19.9
Male	200	199	28	14.1
Non-Binary	--	--	--	--
American Indian or Alaska Native	--	--	--	--
Asian	--	--	--	--
Black or African American	--	--	--	--
Filipino	--	--	--	--
Hispanic or Latino	226	224	48	21.4
Native Hawaiian or Pacific Islander	--	--	--	--
Two or More Races	20	20	0	0.0
White	151	151	22	14.6
English Learners	23	23	5	21.7
Foster Youth	--	--	--	--
Homeless	--	--	--	--
Socioeconomically Disadvantaged	165	163	43	26.4
Students Receiving Migrant Education Services	--	--	--	--
Students with Disabilities	80	79	9	11.4

Note: To protect student privacy, double dashes (--) are used in the table when the cell size within a selected student population is ten or fewer.

### C. Engagement

#### State Priority: School Climate

The SARC provides the following information relevant to the State priority: School Climate (Priority 6):

- Pupil suspension rates;
- Pupil expulsion rates; and
- Other local measures on the sense of safety

## Suspensions and Expulsions

This table displays suspensions data.

Suspensions								
School 2021-22	School 2022-23	School 2023-24	District 2021-22	District 2022-23	District 2023-24	State 2021-22	State 2022-23	State 2023-24
3.31	4.83	3.55	3.39	3.25	2.79	3.17	3.6	3.28

This table displays expulsions data.

Expulsions								
School 2021-22	School 2022-23	School 2023-24	District 2021-22	District 2022-23	District 2023-24	State 2021-22	State 2022-23	State 2023-24
0	0	0	0	0	0	0.07	0.08	0.07

## 2023-24 Suspensions and Expulsions by Student Group

Student Group	Suspensions Rate	Expulsions Rate
All Students	3.55	0.00
Female	0.90	0.00
Male	6.50	0.00
Non-Binary	0.00	0.00
American Indian or Alaska Native	0.00	0.00
Asian	0.00	0.00
Black or African American	0.00	0.00
Filipino	0.00	0.00
Hispanic or Latino	3.54	0.00
Native Hawaiian or Pacific Islander	0.00	0.00
Two or More Races	0.00	0.00
White	4.64	0.00
English Learners	4.35	0.00
Foster Youth	0.00	0.00
Homeless	0.00	0.00
Socioeconomically Disadvantaged	2.42	0.00
Students Receiving Migrant Education Services	0.00	0.00
Students with Disabilities	2.50	0.00

Note: To protect student privacy, double dashes (--) are used in the table when the cell size within a selected student population is ten or fewer.

## 2024-25 School Safety Plan

Sycamore Valley Academy has a fully compliant School Safety Plan. The plan was last reviewed and updated in September 2024. Staff receives full training annually regarding safety practices as well as active shooter training by local law enforcement. Our School Safety Plan consists of responses to lockdown, campus disorder, firearm/shooting, hostage/barricaded subject,

## 2024-25 School Safety Plan

threatening intruder, shelter in place, drop/cover/hold, earthquake, aircraft accident, fire/explosion, flood, and bomb threat. We run monthly fire drills and have earthquake/drop, cover, hold, and lockdown drills three times per year in accordance with state law. Our plan includes multiple campus maps detailing safe escape routes, emergency shut-off locations, two emergency command center locations, and setups, and general campus classroom and facility locations. We include a visual representation of our Incident Command Structure, with staff roles, indicated, a listing of all emergency response teams, and a buddy teacher list for emergency situations. There is also a student release plan, complete with the necessary release forms and information.

Further, the SVA Safety Plan includes an assessment of strategies currently in place, and concerns regarding the physical safety of students, school climate, youth development, compliance with laws, and community parenting.

## D. Other SARC Information Information Required in the SARC

The information in this section is required to be in the SARC but is not included in the state priorities for LCFF.

## 2021-22 Elementary Average Class Size and Class Size Distribution

This table displays the 2021-22 average class size and class size distribution. The columns titled “Number of Classes” indicates how many classes fall into each size category (a range of total students per class). The “Other” category is for multi-grade level classes.

Grade Level	Average Class Size	Number of Classes with 1-20 Students	Number of Classes with 21-32 Students	Number of Classes with 33+ Students
K	19	1	2	
1	14	3		
2	13	3		
3	15	3		
4	15	3		
5	14	3		
6	13	3		
Other	6	1		



## 2022-23 Elementary Average Class Size and Class Size Distribution

This table displays the 2022-23 average class size and class size distribution. The columns titled “Number of Classes” indicates how many classes fall into each size category (a range of total students per class). The “Other” category is for multi-grade level classes.

Grade Level	Average Class Size	Number of Classes with 1-20 Students	Number of Classes with 21-32 Students	Number of Classes with 33+ Students
K	20	3		
1	22		2	
2	15	3		
3	15	3		
4	15	3		
5	14	3		
6	44			1

## 2023-24 Elementary Average Class Size and Class Size Distribution

This table displays the 2023-24 average class size and class size distribution. The columns titled “Number of Classes” indicates how many classes fall into each size category (a range of total students per class). The “Other” category is for multi-grade level classes.

Grade Level	Average Class Size	Number of Classes with 1-20 Students	Number of Classes with 21-32 Students	Number of Classes with 33+ Students
K	21	1	1	
1	22		2	
2	15		3	
3	14		3	
4	15		3	
5	15		3	
6	23		2	
Other	28		4	

## 2023-24 Ratio of Pupils to Academic Counselor

This table displays the ratio of pupils to Academic Counselor. One Full Time Equivalent (FTE) equals one staff member working full time; one FTE could also represent two staff members who each work 50 percent of full time.

Title	Ratio
Pupils to Academic Counselor	0

## 2023-24 Student Support Services Staff

This table displays the number of FTE support staff assigned to this school. One Full Time Equivalent (FTE) equals one staff member working full time; one FTE could also represent two staff members who each work 50 percent of full time. The "Other" category is for all other student support services staff positions not listed.

Title	Number of FTE Assigned to School
<b>Counselor (Academic, Social/Behavioral or Career Development)</b>	
<b>Library Media Teacher (Librarian)</b>	
<b>Library Media Services Staff (Paraprofessional)</b>	
<b>Psychologist</b>	.5
<b>Social Worker</b>	.5
<b>Nurse</b>	.25
<b>Speech/Language/Hearing Specialist</b>	
<b>Resource Specialist (non-teaching)</b>	
<b>Other</b>	

## Fiscal Year 2022-23 Expenditures Per Pupil and School Site Teacher Salaries

This table displays the 2022-23 expenditures per pupil and average teacher salary for this school. Cells with N/A values do not require data.

Level	Total Expenditures Per Pupil	Expenditures Per Pupil (Restricted)	Expenditures Per Pupil (Unrestricted)	Average Teacher Salary
<b>School Site</b>	\$11629	\$2369	9260	81942
<b>District</b>	N/A	N/A	9260	
<b>Percent Difference - School Site and District</b>	N/A	N/A	0.0	
<b>State</b>	N/A	N/A	\$10,771	
<b>Percent Difference - School Site and State</b>	N/A	N/A	-15.1	

## Fiscal Year 2023-24 Types of Services Funded

Sycamore Valley Academy offers ELA, Mathematics, History, Art, Music, Instrumental Music, Spanish, Project-based learning, Social-emotional learning, service-learning, Science, and PE courses to our students. We also have clubs and teams (both academic, like Reading Revolution and Spelling Bee, and athletics such as flag football, boys and girls basketball, boys and girls soccer, boys and girls track, and baseball) that compete at county and league competitions.

Our disciplinary system is based on Restorative Justice principles and is called our "social contract". The social contract includes the use of mediation and counseling for disciplinary infractions. The focus is on helping students repair what was broken through their misbehavior--whether physical property, the functioning of a classroom, or relationships with peers or staff. This approach takes significant staff time to facilitate, but sends the right message to students and is worth the investment of time in the yield it produces by reducing suspensions and building strong, trusting relationships among students, parents, and staff.

## Fiscal Year 2022-23 Teacher and Administrative Salaries

This table displays the 2022-23 Teacher and Administrative salaries. For detailed information on salaries, see the CDE Certification Salaries & Benefits web page at <http://www.cde.ca.gov/ds/fd/cs/>.

Category	District Amount	State Average for Districts in Same Category
<b>Beginning Teacher Salary</b>	63722	39789
<b>Mid-Range Teacher Salary</b>	74078	87825
<b>Highest Teacher Salary</b>	99172	135860
<b>Average Principal Salary (Elementary)</b>	120000	
<b>Average Principal Salary (Middle)</b>		
<b>Average Principal Salary (High)</b>		
<b>Superintendent Salary</b>	171000	
<b>Percent of Budget for Teacher Salaries</b>	40	
<b>Percent of Budget for Administrative Salaries</b>	5	

## Professional Development

Professional development centered around project based learning and reading skills.

This table displays the number of school days dedicated to staff development and continuous improvement.

Subject	2022-23	2023-24	2024-25
<b>Number of school days dedicated to Staff Development and Continuous Improvement</b>	5	5	5



## Monitoring Goals, Actions, and Resources for the 2024-25 Local Control and Accountability Plan (LCAP)

This template is intended for internal monitoring purposes only. The 2024-25 LCAP template and instructions should be consulted when completing required documents.

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

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Blue Oak Academy	Donya Ball, Ed.D. Superintendent	dball@theacademiescharters.org 5597307422

# Goal 1

## Goal Description

**Provide Quality Education for All:** The goal of providing quality education is paramount for the Local Control Accountability Plan (LCAP) because it ensures that all students have equitable access to high-standard academic opportunities that foster their intellectual, social, and emotional development. Quality education supports diverse learning needs, prepares students for future success, and helps close achievement gaps among different student groups. By focusing on rigorous instruction, effective behavior management, and comprehensive support systems, the LCAP aims to create a nurturing and inclusive environment where every student can thrive and reach their full potential. This foundational goal drives all other initiatives within the LCAP, ensuring a holistic approach to student success and well-being.

## Expected Annual Measurable Objectives

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
1.1	SBAC English Language Arts Distance From Standard  CA School Dashboard	All Students- 42.5 Points Below Standard  SED- 60.9 Points below EL- 100.1 SWD- 125.5  FY Not reported on dashboard due to small group size  2023 Dashboard	All Students- 36.7 Points Below Standard (increase 5.8 points)  White Students- 25.4 Points Below standard (increase 3.6 points) Hispanic Students- 42.2 Points Below standard (increase 7.7 points)  SED- 63.2 Points below standard (decline 2.4 points) EL- 91.2 Points below standard (increase 8.9 points)  SWD- 125.8 Points below standard (decrease 0.3 points)  LTEL, Homeless and FY Not reported on dashboard due to small group size  2024 Dashboard		All Students- 36.7 Points Below Standard (increase 5.8 points)  White Students- 25.4 Points Below standard (increase 3.6 points) Hispanic Students- 42.2 Points Below standard (increase 7.7 points)  SED- 63.2 Points below standard (decline 2.4 points) EL- 91.2 Points below standard (increase 8.9 points)  SWD- 125.8 Points below standard (decrease 0.3 points)  LTEL, Homeless and FY Not reported on dashboard due to small group size  2024 Dashboard	All Students- 25 Points Below Standard  SED- 40 Points below EL- 75 SWD- 100  FY Not reported on dashboard due to small group size
1.2	SBAC Results English Language Arts	All Students- 34.36%	All Students 36.21% (increase of 1.85%)		All Students 36.21% (increase of 1.85%)	All Students- 45%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
	% of students meeting/exceeding standards <a href="https://caaspp-elpac.ets.org/caaspp/Default">https://caaspp-elpac.ets.org/caaspp/Default</a>	SED- 24.21% EL- 7.70% SWD- 14.29%  FY Not reported on dashboard due to small group size  2022-23 Results	SED- 23.36% (decrease of 0 .85%) EL- 0%- (decrease of 7.7%) SWD- 2.86% (decrease of 11.43%)  FY Not reported on dashboard due to small group size  2023-24 Results		SED- 23.36% (decrease of 0 .85%) EL- 0%- (decrease of 7.7%) SWD- 2.86% (decrease of 11.43%)  FY Not reported on dashboard due to small group size  2023-24 Results	SED- 35% EL- 20% SWD- 25%  FY Not reported on dashboard due to small group size
1.3	SBAC Mathematics Distance From Standard  CA School Dashboard	All Students- 78 Points Below Standard  SED- 103.8 Points Below EL- 136 Points Below SWD- 158.1 Points Below  FY Not reported on dashboard due to small group size  2023 Dashboard	All Students- 80.1 Points Below Standard (decrease 2.1 points)  White Students- 54.7 Points Below standard (increase 4 points) Hispanic Students- 93.5 Points Below standard (decline 4.7 points)  SED- 110.3 Points below standard (decline 6.5 points) EL- 131.2 Points below standard (increase 4.8 points)  SWD- 154.6 Points below standard (increase 3.5 points)  LTEL, Homeless and FY - Not reported on dashboard due to small group size  2024 Dashboard		All Students- 80.1 Points Below Standard (decrease 2.1 points)  White Students- 54.7 Points Below standard (increase 4 points) Hispanic Students- 93.5 Points Below standard (decline 4.7 points)  SED- 110.3 Points below standard (decline 6.5 points) EL- 131.2 Points below standard (increase 4.8 points)  SWD- 154.6 Points below standard (increase 3.5 points)  LTEL, Homeless and FY - Not reported on dashboard due to small group size  2024 Dashboard	All Students- 55 Points Below Standard  SED- 80 Points Below EL- 110 Points Below SWD- 130 Points Below  FY Not reported on dashboard due to small group size

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
1.4	SBAC Results Mathematics % of students meeting/exceeding standards  <a href="https://caaspp-elpac.ets.org/caaspp/Default">https://caaspp-elpac.ets.org/caaspp/Default</a>	All Students- 22.05%  SED- 14.74% EL- 0.00% SWD- 10.71%  FY Not reported on dashboard due to small group size  2022-23 Results	All Students 19.35% (decrease of 2.7%)  SED- 13.09% (decrease of 1.65%) EL- 0% SWD- 5.71% (decrease of 5%)  FY Not reported on dashboard due to small group size  2023-24 Results		All Students 19.35% (decrease of 2.7%)  SED- 13.09% (decrease of 1.65%) EL- 0% SWD- 5.71% (decrease of 5%)  FY Not reported on dashboard due to small group size  2023-24 Results	All Students- 35%  SED- 25% EL- 10% SWD- 20%  FY Not reported on dashboard due to small group size
1.5	SBAC CAST Distance From Standard  Not reported until 2024 CA Dashboard. Baseline data is locally calculated  CA School Dashboard	All Students - 17.3 Points Below Standard  SED- 22.2 Points Below EL- Not reported- small group size SWD- Not reported- small group size  2023 Dashboard	All Students- 13 Points Below Standard (increase 3.9 points)  Hispanic- 19.2 Points Below Standard (decrease 3.2 points) White- 0.7 Points Below Standard (increase 14.6 points)  SED- 19.5 points below standard (increase 2.6 points)  SWD- 35 points below standard (new baseline)  EL, LTEL and FY- not reported- small group size  2024 Dashboard		All Students- 13 Points Below Standard (increase 3.9 points)  Hispanic- 19.2 Points Below Standard (decrease 3.2 points) White- 0.7 Points Below Standard (increase 14.6 points)  SED- 19.5 points below standard (increase 2.6 points)  SWD- 35 points below standard (new baseline)  EL, LTEL and FY- not reported- small group size  2024 Dashboard	All Students- 5 Points Below Standard  SED- 10 Points Below EL- 15 Points Below SWD- 20 Points Below  FY Not reported on dashboard due to small group size
1.6	SBAC CAST % of students meeting/exceeding	All Students- 29.54%	All Students- 32.39% SWD- 7.69%		All Students- 32.39% SWD- 7.69%	All Students- 45%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
	standards Grades 5 Only  <a href="https://caaspp-elpac.ets.org/caaspp/Default">https://caaspp-elpac.ets.org/caaspp/Default</a>	SED- 13.64% EL- Not reported- small group size SWD- Not reported- small group size  FY Not reported on dashboard due to small group size  2022-23 Results	SED- 21.88% FY, LTEL, EL- No Data due to small group size  Grade 5 All students 32.5%  Grade 8 All students 32.26%  2023-24 Results		SED- 21.88% FY, LTEL, EL- No Data due to small group size  Grade 5 All students 32.5%  Grade 8 All students 32.26%  2023-24 Results	SED- 30% EL- 20% SWD- 25%  FY Not reported on dashboard due to small group size
1.7	English Learner Progress Indicator  % of students increasing one or more proficiency levels towards fluency  CA School Dashboard	52.9% of English Learners  Long Term English Learner progress will be reported on the 2024 Dashboard. That data will be used as a baseline for the LTEL group.  2023 Dashboard	50% of English Learners (decline 2.9%)  Long Term English Learner progress not reported due to small group size (n=9)  2024 Dashboard		50% of English Learners (decline 2.9%)  Long Term English Learner progress not reported due to small group size (n=9)  2024 Dashboard	65% of English Learners  10% increase to baseline reported on the 2024 Dashboard
1.8	English Learner Reclassification Rate % of students reclassified as "Fluent"  CALPADS Report	7.5% (3/ 40)  2022-23 CALPADS Report			3/38 = 7.9%  2023-24 site calculated from CALPADS reporting	20% of English Learners
1.9	Broad Course of Study is offered and available to all students.  Annual Local Survey	90% of Parents 92% of Students 90% of Staff Agree or Strongly Agree  2023-24			Data not available until end of 2024-25 School Year	95% of Parents 96% of Students 95% of Staff Will Agree or Strongly Agree



Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
1.10	Programs and Services were developed and provided to gifted learners and students with disabilities  Annual Local Survey	92% of Parents 83% of Students 69% of Staff Agree the school provides quality instruction for gifted learners.  97% of Parents 84% of Students 90% of Staff Agree and strongly agree the school provides quality instruction for students with disabilities.  2023-24			Data not available until end of 2024-25 School Year	96% of Parents 90% of Students 80% of Staff Will agree the school provides quality instruction for gifted learners.  99% of Parents 90% of Students 95% of Staff Will agree and strongly agree the school provides quality instruction for students with disabilities.
1.11	Programs and Services were developed and provided to unduplicated students including English Learners.	98% of Parents 87% of Students 100% of Staff Agree and strongly agree the school provides quality instruction for English Language Learners.  2023-24			Data not available until end of 2024-25 School Year	99% of Parents 92% of Students 100% of Staff Will agree and strongly agree the school provides quality instruction for English Language Learners.
1.12	Student Access to Standards-Aligned Curriculum Materials  Williams Aligned Self Review	100% of students have access to aligned materials.  2023-24	100% of students have access to aligned materials.  2024-25		100% of students have access to aligned materials.  2024-25	Maintain 100%
1.13	Student Satisfaction with Academic Progress  Annual Local Survey	77% of students are satisfied with their academic progress.  2023-24 Survey			Data not available until end of 2024-25 School Year	85% of students will report being satisfied with their academic progress.

Actions & Measuring and Reporting Results

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
1.1	<p><b>Integrate Gifted Education Strategies</b> Integrate TK-8 Grade Level Universal themes into classroom instruction. Provide full day Transitional Kindergarten to advance early literacy and numeracy skills. Includes cost of 2 full time teachers and 1/2 salary/benefits of instructional coach to support professional development.</p>	Yes	Fully Implemented		All staff hired	\$267,084.00	\$128,061.45
1.2	<p><b>Common Literacy Instruction</b> Research, select, and implement common literacy instruction across all grade levels. Includes 1/2 cost of salary/ benefits for instructional coach to lead this work.</p>	Yes	Fully Implemented		All staff hired	\$65,235.00	\$50,830.98
1.3	<p><b>Behavior Management</b> Research, select, and implement a common behavior management program across all programs. Continue the development of behavioral interventions as part of the MTSS Multi-Tiered Systems of Support for students. This includes an assistant principal to focus on behavioral interventions and parent relations/partnerships to support student success. due to the One emphasis of MTSS this year will be the SWD subgroup, due to their rate on the 2023 CDE Dashboard.</p>	Yes	Partially Implemented		Staff maintained. Power School Attendance Suite was not contracted for the current year due to the discontinuation of the product by the vendor.	\$166,172.00	\$75,174.25

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
1.4	<p><b>Coordination of Services</b> Develop the Coordination of Services Team. This includes the development of academic interventions as part of MTSS which incorporates instructional aides' salaries, i-Ready diagnostic assessment licenses and SEL supports including .5 FTE School Psych/ .5 FTE School Psych Intern/, and the hiring of a Licensed Marriage and Family Therapist. One area of emphasis for this team, in the 2024-25 school year will be the socio-economically disadvantaged student group in the area of mathematics, due to their results as reported on the December 2023 CDE School Dashboard.</p> <p>Title I Funding</p>	Yes	Fully Implemented		All staff hired and working on student services.	\$564,077.00	\$286,248.41

## Goal 2

### Goal Description

**Invest in People:** The goal of Investing in People is critical to the development of the LCAP because it directly impacts both staff and student recruitment and retention. For staff, this investment ensures the attraction and retention of highly qualified and motivated educators, leading to quality education and professional development opportunities that keep teachers updated with the latest educational practices. This, in turn, enhances job satisfaction, reduces turnover rates, and fosters a positive school culture, creating a stable and effective learning environment. For students, high-quality staff leads to better academic outcomes and engagement, contributing to the school's reputation and attracting more families to enroll their children. Additionally, a safe and supportive environment, bolstered by counselors and support staff, addresses students' social and emotional needs, aiding retention. Investment in staff also extends to extracurricular programs, which engage students and cater to diverse interests, making the school more attractive to prospective students. Overall, focusing on investing in people through the LCAP creates a sustainable, high-quality educational environment that supports both staff and students, leading to improved educational outcomes, a stronger school community, and long-term organization success.

### Expected Annual Measurable Objectives

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
2.1	Teachers Appropriately Assigned  CAL SAAS Report	100% of Teachers  2023-24	100% of Teachers  2024-25		100% of Teachers  2024-25	Maintain 100%
2.2	Teachers Fully Credentialed for their grade and subject area assignment.  CAL SAAS Report	70% of Teachers  2023-24	88% (increase of 18%)  2024.25		88% (increase of 18%)  2024.25	76% of Teachers
2.3	Chronic Absenteeism Rate  CA School Dashboard	All Students- 14.3%  SED- 18.7% EL- 9.8% SWD- 10.9%  Foster Youth- Not incl. on state report due to small group size	All Students- 16.3% (Increase 2%)  Hispanic- 18.1% (Increase 3.1%) White- 14.8% (Increased 1.4%) Two or More Races- 4.8% (New Baseline)  SED- 21.5% (Increased 2.8%) EL- 19.6% (Increased 9.8%) LTEL- 9.1% (New baseline) SWD- 23.3% (Increased 12.5%)		All Students- 16.3% (Increase 2%)  Hispanic- 18.1% (Increase 3.1%) White- 14.8% (Increased 1.4%) Two or More Races- 4.8% (New Baseline)  SED- 21.5% (Increased 2.8%) EL- 19.6% (Increased 9.8%) LTEL- 9.1% (New baseline) SWD- 23.3% (Increased 12.5%)	All Students- 10%  SED- 13% EL- 7% SWD- 8%  Foster Youth- Not incl. on state report due to small group size

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
			Foster Youth- Not incl. on state report due to small group size  2024 Dashboard		Foster Youth- Not incl. on state report due to small group size  2024 Dashboard	
2.4	Middle School Drop-Out Rate  CALPADS Report	0%  2022-2023	0%  2023-2024		0%  2023-2024	Maintain 0%
2.5	Suspension Rate  CA School Dashboard	All Students- 2.8%  SED- 5.2% EL- 4.9% SWD- 8.7%  Foster Youth- Not incl. on state report due to small group size	All Students- 2.9% (Increased 0.2%)  Hispanic- 3.8% (Increased 0.7%) White- 2%- (Increased 0.3%) Two or More Races- 0% (New Baseline)  SED- 3.1% (Decreased 2%) EL- 4.2% (Decreased 0.7%) LTEL- 7.7% (New baseline) SWD- 6.6% (Decreased 2.1%)  2024 Dashboard		All Students- 2.9% (Increased 0.2%)  Hispanic- 3.8% (Increased 0.7%) White- 2%- (Increased 0.3%) Two or More Races- 0% (New Baseline)  SED- 3.1% (Decreased 2%) EL- 4.2% (Decreased 0.7%) LTEL- 7.7% (New baseline) SWD- 23.3% (Increased 12.5%)  2024 Dashboard	All Students- 1.5%  SED- 3% EL- 2.5% SWD- 4%  Foster Youth- Not incl. on state report due to small group size
2.6	Expulsion Rate  CA School Dashboard	0%  2022-23	0%  2023-2024		0%  2023-2024	Maintain 0%
2.7	Facilities Conditions  Facilities Inspection Tool Report (FIT)	Overall Rating "Fair"  Spring 2023 FIT Report			Data not available until end of 2024-25 school year	Overall Rating "Good"

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
2.8	Comparison of charter program to local educational options. Statement: The charter is a better option than the local neighborhood alternative.  Local Survey	76% of parents Agree			Data not available until the end of 2024-25 School Year	90% of Parents Agree
2.9	Efforts by Charter to engage parent input. The organization encourages parental involvement.  Local Survey	95% Parents Agree			Data not available until the end of 2024-25 School Year	98% Parents Agree
2.10	Parent Participations in local survey.  Locally Calculated	112 Parents Completed the local survey  Spring 2023			Data not available until the end of 2024-25 School Year	200 Parents completing local survey
2.11	Parent Participation in Monthly Forums  Zoom Participation List Locally Calculated	52 Parents- Average Forum Attendance (Between 2 Forums Per Month)  2022-23			Data not available until the end of 2024-25 School Year	60 Parents- Average Forum Attendance (Between 2 Forums Per Month)

Actions & Measuring and Reporting Results

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
2.1	<b>Hire Quality Staff</b> Refine a comprehensive structure to hire new staff: This includes complete competitive competition analysis, expand recruitment to establish partnerships with external agencies, and central office participation in all interviews. Costs include extra time for Human	Yes	Fully Implemented		HR Director position opened and filled.	\$61,193.00	\$29,040.30

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
	Resource Director and 1/2 salary/benefits.						
2.2	<p><b>Retain highly qualified staff</b> Refine a comprehensive structure to retain high quality staff. This includes offering differentiated professional development for classified and certificated staff, and improvement of leadership skills through administrative professional development opportunities.</p> <p>Title II</p>	Yes	Partially Implemented		<p>Ongoing. Certificated, classified, and leadership training provided.</p> <p>Behavior Management training provided for all staff.</p> <p>Literacy/ writing training provided.</p> <p>ACSA academies training provided for leadership team.</p> <p>School Safety training and special education training planned for second semester.</p>	\$43,599.00	\$15,566.00
2.3	<b>Retain student enrollment</b>	Yes	Fully Implemented		Music teacher position	\$136,115.00	\$50,155.00

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
	Develop and refine a comprehensive structure to retain existing students. This includes expansion of extra and co-curricular activities as well as continued implementation of the music program.				maintained and stipends provided for athletics and club activities.		
2.4	<b>Student Recruitment</b> Develop and refine a comprehensive marketing plan for student recruitment, focusing on unduplicated students and families. This includes utilizing a common messaging platform and social media to communicate events and important information families, updating school website to provide centralized access of resources, and continued implementation of monthly parent forums- superintendent video messages highlighting organizational programs and services as well as social media advertising.	Yes	Partially Implemented		Parent Square implemented.  Operations director position maintained for outreach activities.  Videos not being done- removed from the plan. Social media campaign in process instead and monies from videos supporting.	\$73,639.00	\$36,509.45





# Local Control Accountability Plan (LCAP) Mid Year Report



## ► SUPERINTENDENT

Donya Ball

## ► BOARD OF TRUSTEES

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# Mid Year Reporting Requirements:

California Education Code (EC) sections 47606.5(e), 52062(a)(6), and 52068(a)(6) require LEAs (including charter schools and County Offices of Education) to present a report on the annual update to the LCAP and the Budget Overview for Parents on or before February 28th of each year at a regularly scheduled meeting of the governing board of the LEA.

The report must include both of the following:

- All available midyear outcome data related to metrics identified in the current year's LCAP.
- All available midyear expenditure and implementation data **on all** actions identified in the current year's LCAP.

## PURPOSE:

To provide the public with an update on the implementation of the current LCAP and to allow the LEA to be aware of, and plan for, changes that may need to be made based on revised estimates of revenue, budgeted expenditures and/or student performance

# Overview

- ▶ The Current 3-Year LCAP will take us through June 2027, with annual updates...

Our LCAP has 2 Goals in the areas of:

- ▶ Provide Quality Education for All: includes instruction, behavior management, support systems
- ▶ Invest in People: includes recruiting and retaining quality staff and students

▶ Each Goal has a set of metrics to measure success, actions to accomplish the goal, a budget for each action, and measurements for each action's success.

## Goal One

Provide Quality Education for All:

▶ Funds Allocated: \$1,062,568

Funds Expended through Dec. 2024: \$540,315.09





## 4 Actions included in this goal:

1. Integrated Gifted Education Strategies
2. Common Literacy Instruction
3. Behavior Management
4. Coordination of Services



# Mid- Year Metrics/Results for Goal One

- ▶ **SBAC English-Language Arts Results** Overall increase 5.8 points
- ▶ **SBAC Mathematics Results** Overall decrease 2.1 points
- ▶ **English Learner Progress Indicator** Decline of 2.9%
- ▶ **English Learner Reclassification Rate** Increase of 0.4%
- ▶ **Sufficient Materials**  
100% of students continue to have sufficient instructional materials in core subjects
- ▶ **Implementation of State Board Adopted Academic Content and Performance Standards, including ELD as shown by classroom observations**  
100% of classrooms demonstrate implementation - maintaining baseline

## Goal Two

### Invest in People

- ▶ Funds Allocated: \$314,546
- ▶ Funds Expended to Date: \$131,270.75





## Actions included in this goal:

1. Hire Quality Staff
2. Retain Highly Qualified Staff
3. Retain Student Enrollment
4. Student Recruitment





# Mid Year Metrics/Results for Goal Two

- ▶ **Teachers Assignments**

  - 100% of Teachers are Appropriately Assigned within their credential

  - 88% of teachers are fully credentialed 2024-25

- ▶ **Drop Out Rate**

  - 0% Maintained

- ▶ **Expulsion Rate**

  - 0% Maintained

## Mid Year Metrics/Results for Goal Two

- ▶ **Chronic Absenteeism Rate**      **Increased 2%**
- ▶ **Suspension Rate**                      **Increased 0.2%**



## Monitoring Goals, Actions, and Resources for the 2024-25 Local Control and Accountability Plan (LCAP)

This template is intended for internal monitoring purposes only. The 2024-25 LCAP template and instructions should be consulted when completing required documents.

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

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Sycamore Valley Academy	Donya Ball, Ed.D. Superintendent	dball@theacademiescharters.org (559) 622-3236

# Goal 1

## Goal Description

**Provide Quality Education for All:** The goal of providing quality education is paramount for the Local Control Accountability Plan (LCAP) because it ensures that all students have equitable access to high-standard academic opportunities that foster their intellectual, social, and emotional development. Quality education supports diverse learning needs, prepares students for future success, and helps close achievement gaps among different student groups. By focusing on rigorous instruction, effective behavior management, and comprehensive support systems, the LCAP aims to create a nurturing and inclusive environment where every student can thrive and reach their full potential. This foundational goal drives all other initiatives within the LCAP, ensuring a holistic approach to student success and well-being.

## Expected Annual Measurable Objectives

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
1.1	SBAC English Language Arts Average Distance from Standard  CA School Dashboard	All Students- 27.2 Points Below  SED- 67.8 Points Below EL- 98.8 Points Below SWD- 143.2 Points Below  Foster Youth- Group size too small for state reporting  2023 Dashboard	All Students- 21.9 Points Below Standard (Increase 5.3 points) White - 12.8 Points Below Standard (decline 8.9 points) Hispanic- 28.9 Points Below Standard (increase 15.5 points) Two or More Races- 32.9 Points below standard (decline 25.2 points)  SED- 55.5 Points Below Standard (increase 12.4 points) EL- 54.9 Points Below Standard (increase 43.9 points) SWD- 125.5 Points Below Standard (increase 18 points)  Foster Youth- Group size too small for state reporting  2024 Dashboard		All Students- 21.9 Points Below Standard (Increase 5.3 points) White - 12.8 Points Below Standard (decline 8.9 points) Hispanic- 28.9 Points Below Standard (increase 15.5 points) Two or More Races- 32.9 Points below standard (decline 25.2 points)  SED- 55.5 Points Below Standard (increase 12.4 points) EL- 54.9 Points Below Standard (increase 43.9 points) SWD- 125.5 Points Below Standard (increase 18 points)  Foster Youth- Group size too small for state reporting  2024 Dashboard	All Students- 10 Points Below  SED- 45 Points Below EL- 70 Points Below SWD- 110 Points Below  Foster Youth- Group size too small for state reporting
1.2	SBAC Results English Language Arts	All Students- 40.17%	All Students 41.77% (increase of 1.6%)		All Students 41.77% (increase of 1.6%)	All Students- 55%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
	Met or exceeded standards <a href="https://caaspp-elpac.ets.org/caaspp/Default">https://caaspp-elpac.ets.org/caaspp/Default</a>	SED- 28.23% EL- 8.33% SWD- 2.5%  Foster Youth- Group size too small for state reporting  2022-23 Data	SED- 30.44% (increase of 2.21%) SWD- 0% (decline of 2.5%)  EL, LTEL, and FY data not reported due to small group size  2023-24 Data		SED- 30.44% (increase of 2.21%) SWD- 0% (decline of 2.5%)  EL, LTEL, and FY data not reported due to small group size  2023-24 Data	SED- 40% EL-20% SWD-15%  Foster Youth- Group size too small for state reporting
1.3	SBAC Mathematics Average Distance from Standard  CA School Dashboard	All Students- 52.9 Points Below  SED- 88.2 Points Below EL- 149.9 Points Below SWD- 149.8 Points Below  Foster Youth- Group size too small for state reporting  2023 Dashboard	All Students- 49.3Points Below Standard (Increase 3.6 points)  White - 33 Points Below Standard (decline 2.7 points) Hispanic- 59.6 Points Below Standard (increase 11.9 points) Two or More Races- 79.3 Points below standard (decline 50.7 points)  SED- 90.5 Points Below Standard (decrease 2.6 points) EL- 122.1 Points Below Standard (increase 27.8 points) SWD- 144.5 Points Below Standard (increase 5.3 points)  Foster Youth- Group size too small for state reporting  2024 Dashboard		All Students- 49.3Points Below Standard (Increase 3.6 points)  White - 33 Points Below Standard (decline 2.7 points) Hispanic- 59.6 Points Below Standard (increase 11.9 points) Two or More Races- 79.3 Points below standard (decline 50.7 points)  SED- 90.5 Points Below Standard (decrease 2.6 points) EL- 122.1 Points Below Standard (increase 27.8 points) SWD- 144.5 Points Below Standard (increase 5.3 points)  Foster Youth- Group size too small for state reporting  2024 Dashboard	All Students- 30 Points Below  SED- 60 Points Below EL- 110 Points Below SWD- 110 Points Below  Foster Youth- Group size too small for state reporting

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
1.4	SBAC Results Mathematics % Met or exceeded standards  <a href="https://caaspp-elpac.ets.org/caaspp/Default">https://caaspp-elpac.ets.org/caaspp/Default</a>	All Students- 29.45%  SED- 14.12% EL- 0.00 SWD- 2.5%  Foster Youth- Group size too small for state reporting  2022-23 Data	All Students- 32.14% (increase of 2.69%)  SED- 18.28% (increase of 4.16%) SWD- 0%  2023-2024 Data		All Students- 32.14% (increase of 2.69%)  SED- 18.28% (increase of 4.16%) SWD- 0%  2023-2024 Data	All Students- 40%  SED- 25% EL- 10% SWD- 15% Foster Youth- Group size too small for state reporting
1.5	English Learner Progress Indicator % increased one proficiency level or more  CA School Dashboard	All English Learners 33.3% increased one proficiency level or more  Long Term English Learners (LTEL) Data not included in CA Dashboard until 2024 when baseline will be established  2023 Dashboard	All English Learners- 45% increased one proficiency level or more  LTEL data not reported due to small group size (n= 2)  2024 Dashboard		All English Learners- 45% increased one proficiency level or more  LTEL data not reported due to small group size (n= 2)  2024 Dashboard	All English Learners 50%  Long Term English Learners Establish baseline in 2024 and aim for a 15% increase from the baseline by year 3
1.6	SBAC CAST Grade 5 and 8 Only  CA School Dashboard 2024 and beyond	All Students- 9.4 points below  SED- 20.7 points below EL- N/A- small group size in 2022-23 SWD- N/A- small group size in 2022-23  Foster Youth- Group size too small for state reporting  Locally calculated from ETS results for 2023 Baseline	All Students- 8 points below standard (increase of 1.5 points)  White- 3.7 Points below standard (increase 0.1 point) Hispanic- 11.6 Points below standard (increase 2.4 points)  SED- 12.5 points below (increase 7 points) SWD- 26.7 points below standard (increase 1.6 points)		All Students- 8 points below standard (increase of 1.5 points)  White- 3.7 Points below standard (increase 0.1 point) Hispanic- 11.6 Points below standard (increase 2.4 points)  SED- 12.5 points below (increase 7 points) SWD- 26.7 points below standard (increase 1.6 points)	All Students- 5 points above standard  SED- 10 points below  EL- Establish baseline in 2024 and aim for 10 points below standard  SWD- Establish baseline in 2024 and aim for 15 points below standard  Foster Youth- Group size too small for state reporting

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
			EL, FY, Homeless data not reported due to small group size  2024 Dashboard		EL, FY, Homeless data not reported due to small group size  2024 Dashboard	
1.7	SBAC CAST % Met or exceeded standards  <a href="https://caaspp-elpac.ets.org/caaspp/Default">https://caaspp-elpac.ets.org/caaspp/Default</a>	All Students- 39.19%  SED- 23.81% EL- N/A- small group size in 2022-23 SWD- 0.0%  Foster Youth- Group size too small for state reporting  2022-23 Data	All Students- 35.81%  SED- 20.0% (decrease 3.81%) SWD- 0%  EL, LTEL and Foster Youth- Data not reported due to small group size  2023-24 Data		All Students- 35.81%  SED- 20.0% (decrease 3.81%) SWD- 0%  EL, LTEL and Foster Youth- Data not reported due to small group size  2023-24 Data	All Students- 55%  SED- 40%  EL-Establish baseline in the next assessment and aim for 25% meeting or exceeding standards  SWD- 15%  Foster Youth- Group size too small for state reporting
1.8	English Learner Reclassification % of EL students attaining fluency  CALPADS Report	7.4% (2/ 27) of EL attained fluency  2022-2023	0%  2023-24 CALPADS data		0%  2023-24 CALPADS data	20% attained fluency
1.9	Broad Course of Study is offered and available to all students.  The organization has broad offerings in both core subjects and enrichment opportunities.  Annual Local Survey	86% of Parents 96% of Students 97% of Staff  Agree and Strongly Agree  2023-24 Data			Data not available until end of 2024-25 School Year	92% of Parents 98% of Students 98% of Staff  Agree And Strongly Agree
1.10	Programs and Services were developed and provided to individuals with exceptional needs including SED gifted learners, SWD, and English Learners.	83% of parents 83% of students 88% of staff Agree and Strongly Agree the school provides quality			Data not available until end of 2024-25 School Year	89% of Parents 89% of Students 94% of Staff  Agree and Strongly Agree the school

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
	Annual Local Survey	<p>instructional for gifted learners.</p> <p>92% of parents 91% of students 100% of staff Agree and Strongly Agree the school provides quality instructional for students with disabilities.</p> <p>2023-24 Data</p>				<p>provides quality instructional for gifted learners.</p> <p>98% of Parents 97% of Students 100% of Staff</p> <p>Agree and Strongly Agree the school provides quality instructional for students with disabilities.</p>
1.11	<p>Programs and Services were developed and provided to unduplicated students including English Learners.</p> <p>Annual Local Survey</p>	<p>94% of parents 87% of students 94% of staff</p> <p>Agree and Strongly Agree the school provides quality instruction for English Learner students.</p> <p>2023-24 Data</p>			Data not available until end of 2024-25 School Year	<p>98% of Parents 93% of Students 98% of Staff</p> <p>Agree and Strongly Agree the school provides quality instruction for English Learner students.</p>
1.12	<p>Student Access to Standards-Aligned Curriculum Materials</p> <p>Williams Aligned Self Review</p>	<p>100% of Students have access to aligned materials.</p> <p>Fall 2023 Data</p>	<p>100% of Students have access to aligned materials.</p> <p>Fall 2024 Data</p>		<p>100% of Students have access to aligned materials.</p> <p>Fall 2024 Data</p>	Maintain 100% of students with access to aligned materials
1.13	<p>Student Satisfaction with Academic Progress</p> <p>Annual Local Survey</p>	<p>71% of students satisfied.</p> <p>Spring 2023 Data</p>			Data not available until end of 2024-25 School Year	80% of students satisfied.

Actions & Measuring and Reporting Results



Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
1.1	<p><b>Integrate TK-8 gifted education strategies into differentiated classroom instruction.</b> Integrate TK-8 Grade Level Universal themes into classroom instruction. This includes full day Transitional Kindergarten support with 1 additional full time teacher and 1/2 the salary/benefits of the instructional coach to support these programs.</p>	Yes	Fully Implemented		All staff hired	\$176,664.00	\$107,893.14
1.2	<p><b>Common Literacy Instruction</b> Research, select, and implement common literacy instruction across all grade levels. This includes aligning report cards, reading, and writing instruction across the organization. 1/2 the cost of the instructional coach's salary benefits will be paid to support this work.</p>	Yes	Fully Implemented		All staff hired	\$65,235.00	\$31,503.99
1.3	<p><b>Align behavior management approaches.</b> Research, select, and implement a common behavior management program across both schools. This includes the cost of a vice-principal to continue the implementation of behavioral interventions as part of</p>	Yes	Partially Implemented		Staff maintained. Power School Attendance Suite was not contracted for the current year due to the discontinuation	\$156,364.00	\$65,154.82

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
	Multi-Tiered Systems of Support (MTSS).				of the product by the vendor.		
1.4	<p><b>Coordination of Services Team (COST)</b>            Develop the Coordination of Services Team (COST). This includes:</p> <ul style="list-style-type: none"> <li>• Development and implementation of academic interventions as part of Multi Tiered Systems of Support (MTSS) and related instructional aides' salaries/ benefits</li> <li>• Cost of i-Ready diagnostic assessments annually</li> <li>• retainment of full-time school psychologist and school psych intern to conduct assessments and provide psych services. Salaries will be split between both charters so each site will pay .5 FTE of each.</li> <li>• Expansion of social emotional services through hiring of a Mental Health Clinician-LMFT</li> </ul> <p>Title I Funding</p>	Yes	Fully Implemented		All staff hired and working on student services.	\$397,582.00	\$174,821.46

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures

## Goal 2

### Goal Description

**Invest in People:** The goal of Investing in People is critical to the development of the LCAP because it directly impacts both staff and student recruitment and retention. For staff, this investment ensures the attraction and retention of highly qualified and motivated educators, leading to quality education and professional development opportunities that keep teachers updated with the latest educational practices. This, in turn, enhances job satisfaction, reduces turnover rates, and fosters a positive school culture, creating a stable and effective learning environment. For students, high-quality staff leads to better academic outcomes and engagement, contributing to the school's reputation and attracting more families to enroll their children. Additionally, a safe and supportive environment, bolstered by counselors and support staff, addresses students' social and emotional needs, aiding retention. Investment in staff also extends to extracurricular programs, which engage students and cater to diverse interests, making the school more attractive to prospective students. Overall, focusing on investing in people through the LCAP creates a sustainable, high-quality educational environment that supports both staff and students, leading to improved educational outcomes, a stronger school community, and long-term organization success.

### Expected Annual Measurable Objectives

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
2.1	Teachers Appropriately Assigned SAAS Report	100% Appropriately Assigned 2023 SAAS Report	100% Appropriately Assigned 2024 SAAS		100% Appropriately Assigned 2024 SAAS	Maintain 100% compliance with
2.2	Teacher Fully Credentialed in the subject area for the pupils they are teaching. SAAS Report	71% Fully Credentialed 2023 SAAS Report	67% Fully Credentialed (decline 4%) 2024-2025		67% Fully Credentialed (decline 4%) 2024-2025	77% Fully Credentialed
2.3	Chronic Absenteeism Rate CA School Dashboard	All Students- 19.6% SED- 26.1% EL- 31% SWD- 17.2% Foster Youth- Groups Size too small for state reporting 2023 Dashboard	All Students- 17.1% (decline 2.4%) Hispanic- 21.4% (decline 0.7%) Two or more races- 2.9% (decline 7.9%) White- 14.6%- (decline 4.1%) SED- 26.4% (increase 0.2%) EL- 21.7% (decline 9.3%) SWD- 11.4% (decline 5.8%)		All Students- 17.1% (decline 2.4%) Hispanic- 21.4% (decline 0.7%) Two or more races- 2.9% (decline 7.9%) White- 14.6%- (decline 4.1%) SED- 26.4% (increase 0.2%) EL- 21.7% (decline 9.3%) SWD- 11.4% (decline 5.8%)	All Students- 12% SED- 18% EL- 22% SWD- 10% Foster Youth- Groups Size too small for state reporting

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
			LTEL and Foster Youth- Data not reported due to small group size  2023 Dashboard		LTEL and Foster Youth- Data not reported due to small group size  2023 Dashboard	
<b>2.4</b>	Middle School Drop-Out Rate  CALPADS Report	0%  2022-23 CALPADS Report	0%  2023-24 CALPADS Report		0%  2023-24 CALPADS Report	Maintain 0%
<b>2.5</b>	Suspension Rate  CA School Dashboard	All Students- 4.5%  SED- 6.3% EL- 3.4% SWD- 11.3%  Foster Youth- Groups Size too small for state reporting  2023 Dashboard	All Students- 3.6% (decline 1%)  Hispanic- 3.5% (decline 1.6%) Two or more races- 0% (decline 5.3%) White- 4.6%- (increase 0.7%)  SED- 2.4% (decline 3.9%) EL- 4.3% (increase 0.9%) SWD- 2.5% (decline 8.8%)  LTEL and Foster Youth- Data not reported due to small group size  2023 Dashboard		All Students- 3.6% (decline 1%)  Hispanic- 3.5% (decline 1.6%) Two or more races- 0% (decline 5.3%) White- 4.6%- (increase 0.7%)  SED- 2.4% (decline 3.9%) EL- 4.3% (increase 0.9%) SWD- 2.5% (decline 8.8%)  LTEL and Foster Youth- Data not reported due to small group size  2023 Dashboard	All Students- 3%  SED- 4.5% EL- 2.5% SWD- 7%  Foster Youth- Groups Size too small for state reporting  2023 Dashboard
<b>2.6</b>	Expulsion Rate  CA School Dashboard	0%  2023 Dashboard	0%  2023-24 CALPADS Report		0%  2023-24 CALPADS Report	Maintain 0%

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
2.7	Facilities Conditions Facilities Inspection Tool Report (FIT)	Overall Fit Report Rating "Fair" Spring 2022			Data not available until end of 2024-25 School Year	Overall Fit Report Rating "Good"
2.8	Comparison of charter program to local educational options. (Neighborhood school) Local Survey	83% of parents - better option Spring 2023			Data not available until end of 2024-25 School Year	90% of parents - better option
2.9	Efforts by Charter to engage parent input. The organization encourages parental involvement. Local Survey	87% of parents agree and strongly agree Spring 2023			Data not available until end of 2024-25 School Year	93% of parents agree and strongly agree
2.10	Parent Participations in local survey. Locally Calculated	106 Parents completed the local organizational climate survey. Spring 2023			Data not available until end of 2024-25 School Year	150 parents completing the survey
2.11	Parent Participation in Monthly Forums Sign-in Sheets- locally calculated.	52 Parents average attendance at forums 2022-2023			Data not available until end of 2024-25 School Year	60 Parents Average attendance at forums
2.12	Parent, Student and Teacher sense of Safety on Campus Local Survey	Parents- 94% Students- 71% Staff- 94%  Agree and strongly agree that students and staff are safe at school.  Spring 2023 Survey Results			Data not available until end of 2024-25 School Year	Parents- 98% Students- 90% Staff- 98%  Agree and strongly agree that students and staff are safe at school.

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
2.13	Parent, Student and Teacher sense of Connectedness to school.  Local Survey	Parents- 82% Students- 76% Staff- 97%  Agree and strongly agree that the school offers sufficient extra and co-curricular activities.  Spring 2023 Survey Results			Data not available until end of 2024-25 School Year	Parents- 90% Students- 85% Staff- 98%  Agree and strongly agree that the school offers sufficient extra and co-curricular activities.

Actions & Measuring and Reporting Results

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
2.1	<b>Comprehensive new staff hiring structure</b> Develop and refine a comprehensive structure to hire new staff. This includes: <ul style="list-style-type: none"> <li>Complete competitive compensation analysis, expand recruitment to establishing partnerships with external agencies, and central office participation in all job interviews. 1/2 of HR Director salary will be paid to support this goal</li> </ul>	Yes	Fully Implemented		HR Director position opened and filled.	\$61,193.00	\$29,040.30
2.2	<b>Retain High Quality Staff</b>	Yes	Partially Implemented		Ongoing. Certificated, classified, and	\$46,868.00	\$14,509.00

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
	<p>Develop and refine a comprehensive structure to retain high quality staff. This includes:</p> <ul style="list-style-type: none"> <li>• Differentiated professional development for classified and certificated staff.</li> <li>• Improvements of leadership through administrative and professional development.</li> </ul> <p>Title II Funding</p>				<p>leadership training provided.</p> <p>Behavior Management training provided for all staff.</p> <p>Literacy/ writing training provided.</p> <p>ACSA academies training provided for leadership team.</p> <p>School Safety training and special education training planned for second semester.</p>		
2.3	<p><b>Retain Existing Students</b> Develop and refine a comprehensive structure to retain existing students. This includes expansion of co-curricular and extracurricular activities as well as continuation of the music program. A focus for this area will be the Socio-Economically Disadvantaged student suspension rate to keep these students in the program and successfully matriculating to high school.</p>	Yes	Fully Implemented		Music teacher position maintained and stipends provided for athletics and club activities.	\$98,986.00	\$41,684.92



Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
2.4	<p><b>Student Recruitment</b> Develop and refine a comprehensive marketing plan for student recruitment. This includes:</p> <ul style="list-style-type: none"> <li>Utilization of common messaging platform and social media to communicate events and important information to families.</li> <li>Update of school website to provide centralized access of resources</li> <li>Continued implementation of monthly parent forums, superintendent video messages highlighting organization programs and services, and social media advertising.</li> </ul> <p>Associated costs include Bloomz or another parent messaging system license fees,, 1/2 of the Operations Director salary to support website services, and 1/2 the cost of Ellie the Editor and Facebook ads (split between the two charter sites.)</p>	Yes	Partially Implemented		<p>Parent Square implemented.</p> <p>Operations director position maintained for outreach activities.</p> <p>Videos not being done-removed from the plan. Social media campaign in process instead and monies from videos supporting.</p>	\$73,981.00	\$36,843.45



# Local Control Accountability Plan (LCAP) Mid Year Report



## ► SUPERINTENDENT

Donya Ball

## ► BOARD OF TRUSTEES

Harold Rollin, Esq. - Chair

Alex Tietjen, Vice Chair

Marilou Monsivais, Treasurer

Cristina Gutierrez, Secretary

Craig Wheaton, Member

Sheridyn Blain, Member

Mary Aceves, Member

# Mid Year Reporting Requirements:

California Education Code (EC) sections 47606.5(e), 52062(a)(6), and 52068(a)(6) require LEAs (including charter schools and County Offices of Education) to present a report on the annual update to the LCAP and the Budget Overview for Parents on or before February 28th of each year at a regularly scheduled meeting of the governing board of the LEA.

The report must include both of the following:

- All available midyear outcome data related to metrics identified in the current year's LCAP.
- All available midyear expenditure and implementation data **on all** actions identified in the current year's LCAP.

## PURPOSE:

To provide the public with an update on the implementation of the current LCAP and to allow the LEA to be aware of, and plan for, changes that may need to be made based on revised estimates of revenue, budgeted expenditures and/or student performance

# Overview

- ▶ The Current 3-Year LCAP will take us through June 2027, with annual updates.

Our LCAP has 2 Goals in the areas of:

- ▶ Provide Quality Education for All: includes instruction, behavior management, support systems
- ▶ Invest in People: includes recruiting and retaining quality staff and students

- ▶ Each Goal has a set of metrics to measure success, actions to accomplish the goal, a budget for each action, and measurements for each action's success.

## Goal One

Provide Quality Education for All:

▶ Funds Allocated: \$1,062,568

Funds Expended through Dec. 2024: \$379,373.41





## 4 Actions included in this goal:

1. Integrated Gifted Education Strategies
2. Common Literacy Instruction
3. Behavior Management
4. Coordination of Services



# Mid- Year Metrics/Results for Goal One

- ▶ **SBAC English-Language Arts Results** Overall increase 5.3 points
- ▶ **SBAC Mathematics Results** Overall increase 3.6 points
- ▶ **English Learner Progress Indicator** Overall increase 11.7%
- ▶ **English Learner Reclassification Rate** Increase of 0.4%
- ▶ **Sufficient Materials**  
100% of students continue to have sufficient instructional materials in core subjects
- ▶ **Implementation of State Board Adopted Academic Content and Performance Standards, including ELD as shown by classroom observations**  
100% of classrooms demonstrate implementation - maintaining baseline

## Goal Two

### Invest in People

- ▶ Funds Allocated: \$314,546
- ▶ Funds Expended to Date: \$122,077.67





# Actions included in this goal:

1. Hire Quality Staff
2. Retain Highly Qualified Staff
3. Retain Student Enrollment
4. Student Recruitment



# Mid Year Metrics/Results for Goal Two

- ▶ **Teachers Assignments**

  - 100% of Teachers are Appropriately Assigned within their credential

  - 67% of teachers are fully credentialed 2024-25

- ▶ **Drop Out Rate**

  - 0% Maintained

- ▶ **Expulsion Rate**

  - 0% Maintained

## Mid Year Metrics/Results for Goal Two

- ▶ **Chronic Absenteeism Rate**      **17.1% overall- decline 2.4%**
- ▶ **Suspension Rate**                      **3.6% overall- decline 1%**

	Name	Board Member Since	Parent?	Office	Term Expiration 2 Year Terms w/ option to renew
1	Harold Rollin, Esq.	Mar 2015	SVA	Chair	January 31, 2026
2	Alex Tietjen	Feb 2018	BOA	Vice Chair	January 31, 2026
3	Cristina Gutierrez	Apr 2021	No	Secretary	January 31, 2025
4	Marilou Monsivais	Apr 2021	No	Treasurer	January 31, 2025
5	Craig Wheaton	Feb 2017	No	Member	January 31, 2026
6 (min)	Mary Aceves	Jan 2024	SVA	Member	January 31, 2026
7	Sheridyn Blain	Aug 2024	BOA	Member	July 31, 2026
8			No/ BOA/ SVA	Member	
9 (max)			No/ BOA/ SVA	Member	

By 19-20: min =6, max= 9; No fewer than 4 and no greater than 8 members are Parent Reps with no fewer than 2 per school; minimum one non-parent community member on the Board; authorizer MAY (but is not required to) have a representative on the Board.

SVA Administration	
Name	Title
Donya Ball	Superintendent
Corey Morse	Principal
Mackenzie Souza	Vice Principal

BOA Administration	
Name	Title
Donya Ball	Superintendent
Staci Soares	Principal
Alexis Vance	Vice Principal

**BEFORE THE GOVERNING BOARD**  
**THE ACADEMIES CHARTER MANAGEMENT ORGANIZATION**  
**RESOLUTION 25-001**

IN THE MATTER OF  
REORGANIZATION OF BOARD OFFICES  
FOR THE BOARD OF DIRECTORS OF THE ACADEMIES CHARTER MANAGEMENT ORGANIZATION

WHEREAS, The Academies Charter Management Organization must vote annually upon officers and members of its Board of Directors, pursuant to Article IV, Section 4 of The Academies CMO corporate bylaws,

THEREFORE BE IT RESOLVED THAT the Governing Board has voted this evening to elect individuals to voting membership in The Academies Charter Management Organization Board of Directors, and to the following positions within the Board:

- \_\_\_\_\_ - Board Chairperson
- \_\_\_\_\_ - Board Vice Chairperson
- \_\_\_\_\_ - Board Secretary
- \_\_\_\_\_ - Board Treasurer
- \_\_\_\_\_ - Board Member
- \_\_\_\_\_ - Board Member
- \_\_\_\_\_ - Board Member

I, \_\_\_\_\_, Secretary of The Academies Charter Management Organization Board of Directors, do hereby certify that the foregoing is a true account of the Board's voting for reorganization, and is a true copy of a resolution passed by the Board at a regular meeting of the Board held on January 21, 2025.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Secretary, The Academies CMO Board of Directors

**BEFORE THE GOVERNING BOARD**  
**THE ACADEMIES CHARTER MANAGEMENT ORGANIZATION**  
**RESOLUTION 25-002**

IN THE MATTER OF

APPLYING FOR GRANTS IN THE 2025 CALENDAR YEAR

ON BEHALF OF THE ACADEMIES CHARTER MANAGEMENT ORGANIZATION, SYCAMORE VALLEY ACADEMY, AND BLUE OAK ACADEMY

WHEREAS, The Academies Charter Management Organization and its schools may benefit from securing additional funding in the form of grants,

THEREFORE BE IT RESOLVED THAT the Governing Board has voted this evening to permit the Superintendent to apply for grants on behalf of the Academies Charter Management Organization, Sycamore Valley Academy and Blue Oak Academy, consistent with the mission and vision for the organization.

Ayes \_\_\_\_\_

Nos \_\_\_\_\_

Abstentions \_\_\_\_\_

Absent \_\_\_\_\_

I, \_\_\_\_\_, Secretary of The Academies Charter Management Organization Board of Directors, do hereby certify that the foregoing is a true account of the Board's voting, and is a true copy of a resolution passed by the Board at a regular meeting of the Board held on January 21, 2025.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Secretary, The Academies CMO Board of Directors