

PUENTE Learning Center

PUENTE Charter School Board of Directors Meeting Agenda

Wednesday, June 28, 2023

3:00pm

501 S. Boyle Avenue, Los Angeles, CA 90033

Join Zoom Meeting

<https://puente-org.zoom.us/j/87159333835>

Meeting ID: 871 5933 3835

Notice is hereby given that the PUENTE Learning Center Board of Directors of PUENTE Charter School will hold a public meeting at the above-referenced time and Zoom link. The purpose of the meeting is to discuss and take action on the following agenda. The agenda shall provide an opportunity for members of the public to address the board directly at each location. (GOV CODE: 54954.3).

If you require special accommodations in order to attend this meeting, please call Jerome Greening at (626) 260 – 0070 or e-mail at jerome@puente.org.

Agendas for all regular board meetings are posted at least 72 hours prior to the meeting, and agendas for all special board meetings are posted at least 24 hours prior to the meeting at the entrances of the PUENTE facility and on the Parent Board at PUENTE Charter School, teleconference locations, and on www.puente.org. (GOV CODE: 54954.2. 54956)

Agenda Item	Proposed Action	Attachments	Who
1. Call to Order and Roll Call to Establish Quorum	Roll Call	Board Roster	Board Chair, Chun Wong
2. Minutes – February 22, 2023	Approval	Minutes	
3. Public Comment Members of the public are welcome to address the PUENTE Charter School Board directly at a regular meeting to address any item of interest, or on the agenda and at a special meeting to address any item on the agenda, before or during the consideration of the item. Comments will be limited to three minutes. (GOV CODE: 54954.3) No action shall be taken on any item not appearing on the agenda unless the action is otherwise authorized by subdivision (b) of GOV CODE Section 54954.2.			
4. Operations & Programs			
i. Charter School Operations Update; Including 2022-23 LAUSD Oversight Visit Report & Local Indicators	Review	LAUSD Oversight Report for 2022-23 & PowerPoint	Principal; Brenda Meza Charter School Advisory Member; Oscar Cabrales; CEO; Jerome Greening
ii. Instructional Calendar for Upcoming 2023-2024 Academic Year	Approval	Calendar	
iii. Special Educational Renewal - Comprehensive Therapy Associates Contract for as-needed special education services	Approval	Renewal Contract	
iv. School Nutrition Renewal- School Nutrition Plus Contract for meal service consisting of breakfast, lunch and snack	Approval	Renewal Contract	
v. After School Provider – Think Together; Contract continuation through June 2024	Informational	PowerPoint	
vi. EPA Funding- Spending plan to allocate these funds to support teacher salaries and benefits. This funding is approximately 17% of the LCFF base rate	Approval	Regulatory Percentage of 17%	

vii. Local Control Accountability Plan(LCAP) Packet 23-24. Budget allocation for school goals and outcomes for 2023-24	Approval	LCAP FY24	
5. Finance Report			
i. Charter Financials as of March 31, 2023	Informational	Finance Report	VP of Finance & Administration,Angelica Castro, CEO, Jerome Greening Finance Committee Members,Chun Wong, Jocelyn Rosenwald
ii. Proposed Budget for FY24	Approval	Proposed FY24 Budget	
iii. Accounting Policies & Procedures	Approval	Accounting Policies & Procedures	
6. Adjournment			Board Chair, Chun Wong
Certification of Posting I, Isabel Ocampo, hereby certify that this agenda was posted on 6/16/2023 at 11am at: - PUENTE Learning Center website: www.puente.org			



Governing Board Member Roster

PUEENTE Charter School

PUEENTE Learning Center

Board Meeting June 14, 2023 – 8:30 am

Board of Directors
Board Chair, Chun Wong
Board Vice Chair, Tyler M.P. Sutherland
Board Treasurer, Jocelyn Rosenwald
Board Secretary, Oscar Cabrales
Board Member, Greg Gonzalez
Board Member, Lara Lightbody
Board Member, Albert Reyes



PUENTE Learning Center
501 S. Boyle Avenue, Los Angeles, CA 90033
BOARD MEETING MINUTES
February 22, 2023
8:30 am

<https://puente-org.zoom.us/j/89195820438>

Meeting ID: 891 9582 0438

The PUENTE Charter School board meeting was conducted via Zoom due to COVID-19 on Wednesday, February 22, 2023 at 8:32 am.

Board Members in Attendance: Chun Wong, Tyler Sutherland, Oscar Cabrales, Lara Lightbody and Albert Reyes

Board Members not in Attendance: Jocelyn Rosenwald, Greg Gonzalez,

PUENTE Staff in Attendance: Jerome Greening, Brenda Meza, Angelica Castro, Matt Wells, Michele Wolfe, and Isabel Ocampo

Call to Order

Chun Wong called the meeting to order at 8:32am. A quorum was established.

Roll Call

Board Chair Chun Wong conducted a roll call for Board Members. Present were: Chair, Chun Wong, Tyler Sutherland, Oscar Cabrales, Lara Lightbody and Albert Reyes.

Absent: Greg Gonzalez, Jocelyn Rosenwald

Approval of Board Meeting Minutes from December 7, 2022

Motion: A motion was duly made by Chung Wong and seconded by Oscar Cabrales to approve the December 7, 2022 minutes. The board moved to accept the minutes as written. *Wong, "yes"; Sutherland "yes"; Cabrales, "yes"; Lightbody "yes"; Reyes, "yes"*

Public Comment

Chun invited anyone present who wished to make public comments to do so. There were none.



Principal, Brenda Meza, presented the Operations & Programs update to the board.

Staff Report

Operations & Programs

Data Dashboard and School Operations

This month PUENTE Charter will begin Student Study Team “MTSS”. A meeting will be held with a group of educators and parents to provide intensive intervention for students who are most likely not benefiting from whole group and small group instruction. If students are not demonstrating any progress after having a “MTSS” will lead to screen for special education. These intensive interventions are conducted twice a year.

Priority number four, PUENTE Charter moved forward with Gifted testing. This month we had a total of six students. This month we also started with ELPAC an assessment that is given to all English Language Learners. This year PUENTE Charter has a total of 84 students taking the ELPAC test.

Ms. Meza provided an update for school priority number five, attendance for the last five months of the academic school year. The numbers have been pretty consistent.

Board member Albert Reyes, asked if kids are missing because of the flu, or other reasons why they are not attending schools.

Ms. Meza shared families are now taking precautions, if kids are coughing, they are now staying home. Vice Principal, Diana Juarez is having meetings with parents to see what we can do to support students at home while out sick.

Ms. Meza shared priority number six School Climate: PUENTE Charter provided a Winter student survey to 3rd, 4th and 5th grades of 12 multiple choice questions and 2 short answers. The first question was, “Do the teachers and other grown-ups from your school want you to do your best?” the response was 89.9% Yes, all of the time.

Principal Meza shared priority number seven course access, PUENTE Charter has seen an increase in counseling services this academic school year. Making a comparison between last academic and this year, last year our counselor would only see five students and most of her work was providing small group instruction or small group services or going into classrooms and facilitating social emotional learning. This academic school year our counselor sees over 23 students, 11 of these students have special needs and 12 are because parents requested services. We are seeing a lot of social anxiety and separation anxiety and overall, the traumatic events that they have been through in the last few years.



For special education, PUENTE Charter was selected by the State for Small LEA's. This involved two different cycles to ensure we are monitoring our special education students, both cycles have been completed and are now waiting on the results.

Ms. Meza shared highlights from last Friday. PUENTE had an exciting and wonderful event in collaboration with Vision to Learn. They screened 257 for vision and 70 students received glasses through Vision to Learn, completely free of charge. On Friday we disbursed the glasses and it was wonderful seeing the kids with their new glasses. PUENTE Charter hopes to continue with this partnership each year.

CEO Jerome Greening thanks Mr. Greg Gonzalez who connected PUENTE Charter with Vision to Learn. The services were given to PUENTE but the funds were gifted by the Riordan Foundation. On Friday's event Mrs. Riordan attended and was able to re-connect with PUENTE.

PUENTE Charter was a California MTSS awardee. This is an integrated framework that focuses on providing core instruction to ensure we are meeting all of our students' needs. As a school we will be going through a certification course, about 20- 30 hours of training and we are making this a focus for next academic school year for all instructional staff.

Ms. Meza shared USC will be providing dental exams very similar to Vision to Learn. USC will be at PUENTE later on in March. We will also be providing with emotional well-being healthcare. The oral health services will be onsite. The social emotional services will be at a different location.

Priority number 8 student outcomes, PUENTE Charter administered the English assessment for all TK to Fifth grade students. This assessment is administered three times a year, for the Winter assessment we see 46% of our students were able to meet or exceed their projected growth. Every student has different projected growth. The project growth is anywhere between 2-10 points and we can see 46 of our students at PUENTE were able to meet or exceed. Overall, we noticed 83% were able to make progress in English Language Arts. For Math we had 44% that met or exceeded projected growth and a 92% progress. We have another opportunity this academic school year, we will be administering the next Math assessment at the end of May.

Board President Chun Wong, thanked Ms. Meza.



CEO, Jerome Greening provided a LAUSD Oversight Visit Preparation Update

LAUSD Oversight Visit Preparation

Jerome, in collaboration with Ms. Meza, are preparing for the oversight visit. PUENTE Charter received a call from a new colleague at LAUSD, Ms. Fabiola Garcia, who requested to postpone the visit to March 22, 2023. The fiscal oversight is being conducted right now and Jerome thanked Angelica Castro, Vice President of Finance , and Kim Denes, PUENTE Charter Accountant for working with Helena Han from LAUSD and Alan Villamor who lead the LAUSD Charter fiscal oversight component.

Update on Form 700 Reporting

Jerome thanked board members Mr. Wong, Mr. Cabrales and Mr. Reyes who completed the form. Jerome informed the board of the LACountyForm 700 is now a very user-friendly form and, if needed, staff can provide support.

Via zoom chat board member Tyler, informed those in attendance she did not receive the LAC Form 700. IJerome will follow up and send the form to the appropriate email.

VP of Finance and Administration, Angelica Castro, presented the Charter financials as of December 31, 2022 to the board.

Staff Report

Financial Report

As of December 31, 2022, the Charter School reported total revenue of \$2,733,238 and expenses of \$2,555,331 for a net surplus of \$177,907. Total actual expenses are \$40,726 in excess of the YTD total budget.

Line items to highlight are as follow:

- **Personnel cost:** Personnel cost was \$1,499,862 or approximately 58.7% of expense allocation. Budgeted amount exceeded total actuals by \$114,310.
- **Professional Services:** Professional services was \$224,494 or approximately 8.79% of expense allocation. It exceeded YTD budgeted amount by approximately \$11,464. This is mainly due to the hiring of substitute teachers, after school program and custodial contractor.
- **Special Ed Contract:** Special Ed Contract was \$135,774 or 5.31% of expense allocation and exceeded budgeted amount by approximately \$63,574. This was mainly due to the expanded health and wellness component requirements from the CDE for ESSERS funding.



- Special Ed Fair Share: The Charter School is fiscally responsible for a partial payment of expense associated with Special Education Programs that the School District is responsible for and pays for out of its General Fund.
- Special Ed Fair Share was \$105,975 or 4.15% expense allocation and exceeded YTD budgeted amount by approximately \$23,199.
- Food Service Contract: Food Service Contract was \$81,333 or 3.18% expense allocation and exceeded YTD budgeted amount by approximately \$28,984. This was mainly due to the afterschool program.
- Textbooks: Textbook expenses were \$37,632 or approximately 1.47% of expense allocation. It exceeded YTD budgeted amount by approximately \$18,907. This was mainly due to the unexpected increase of textbook costs and the addition of Reading Wonders books for all students Grades 1 – 5.
- Staff Development: Staff Development expenses were \$17,081 or approximately 0.67% of expense allocation and exceeded YTD budgeted amount by approximately \$14,140. This was mainly due to the cost associated with the Community Training Workshop.
- Advertising & Publicity: Advertising & Publicity was \$19,511 or approximately 0.76% of expense allocation and exceeded YTD budgeted amount by approximately \$13,255. This was mainly due to expenses related to the recruitment of new teachers and staff.
- Student Activities: Student activities was \$12,270 or 0.48% of expense allocation and exceeded budgeted amount by approximately \$8,870. This is mainly due to unbudgeted expenses associated with summer school extended learning activities required by stimulus funding.

Statement of Financial Position

Cash & cash equivalent: Cash balance was \$987,552. An increase of \$147,319 from June 30, 2022. This was mainly due to the following:

- Increase of receivables' collection of \$193,085.
- Deferred revenue: Deferred revenue was \$608,389. An increase of \$359,904 in advance payments.
- Furniture & Fixtures: Furniture & Fixtures balance of \$385,508 is an increase of \$90,622. This is mainly due to the purchase of classroom furniture, computer equipment & leasehold improvements.

Financial Key Indicators

Working Capital

- The Working Capital: PUENTE has \$1,335,086 available for current and future use.
- Asset performance.
- Cash Ratio is \$1.42: This is another indicator of future cash flow. This means that for every \$1 of liability, the Charter School has \$1.42 of liquid cash.



- Quick Ratio \$2.92: Measures the ability to pay PUENTE's short-term liabilities by having assets that are readily convertible into cash. This means that the Charter School has capacity to pay off its current liabilities with the current assets and can easily fund its day-to-day operations. Here for every \$1 of current liability, the Charter School has \$2.92 of quick assets to pay for it.
- Months of Cash on Hand: Represents the number of months of operating expenses that the Center can pay with its current cash available. The Charter School has 2.3 months of cash on hand.

Capitalization structure assess long-term solvency and stability:

- Debt-to-equity Ratio: Debt-to-equity Ratio of 0.363. This ratio indicates that most of PUENTE's assets and resources are provided by funding from the school district and not creditors or vendors. PUENTE Charter uses 0.363 of debt financing for every \$1 of equity financing.

Statement of Cash Flow

The Charter School's cash increased by \$147,317. This increase was mainly due to the following:

- a. As the Statement of Activities reports equity earnings, the Statement of Cash Flow reports how much cash is coming from the equity earnings reported on the Statement of Activities. As such, on this statement we eliminate noncash items such as depreciation expense. (A non-cash item). As a non-cash item, change in depreciation of \$24,485 is added to the net surplus to reconcile the cash from operations.
- b. Accounts receivable increased by \$191,238. Increasing receivables means less inflow of cash through decrease in collections. Therefore, the \$191,238 is subtracted from the net surplus.
- c. Contribution receivables increased by \$1,836. Increasing receivables means less cash through the decrease in collections. Therefore, the \$1,836 is subtracted from the net surplus.
- d. Deferred revenue increased by \$359,904. Increasing deferred revenue means that we received and advance payment for future programs. The increase results in an inflow of cash. The \$359,904 is added to the net surplus.
- e. Due to Other Programs to the Center decreased by \$131,284. Decreasing liabilities means that obligations are paid sooner than later. As such, the Charter School has less cash on hand, as the \$131,284 is subtracted from the net surplus.
- f. Property & Equipment increased by \$90,622. This was mainly due to the payments related to the purchase of laptops and desktop computers for our students and staff. The increase resulted in a decrease in cash. As such, the change is subtracted from the total change in net assets.
- g. The total increase in cash of \$147,317 is added to the beginning cash of \$840,234 resulting in ending cash balance of \$987,553.



Approval of LAUSD 2ND Interim Financials for FY23

Angelica Castro shared the PUENTE FY23 LAUSD 2nd Interim Report.

Motion: A motion was duly made by Board Chair Chun Wong and seconded by Albert Reyes to approve the LAUSD 2nd Interim Financials for FY23. Board moved to approve the LAUSD 2nd Interim FY23 Financial Report. *Wong, "yes"; Sutherland "yes"; Cabrales, "yes"; and Reyes "yes".*

Approval of the FY23 Audit Engagment Letter from Audit Firm Maginnis, Knechtel & McIntyre

Angelica Castro, Chun Wong, & Albert Reyes presented the FY23 Audit Engagement Letter from Maginnis, Knechtel & McIntyre for approval.

Motion: A motion was duly made by Board member Albert Reyes and seconded by Board Chair Chun Wong to approve. The board moved to approve the FY23 Audit Engagement Letter. *Wong, "yes"; Sutherland "yes"; Cabrales, "yes" and Reyes "yes".*

Adjournment of Meeting

Chun Wong thanked everyone for their participation and adjourned the meeting at 9:00 am.

Submitted

Respectfully,

Isabel Ocampo



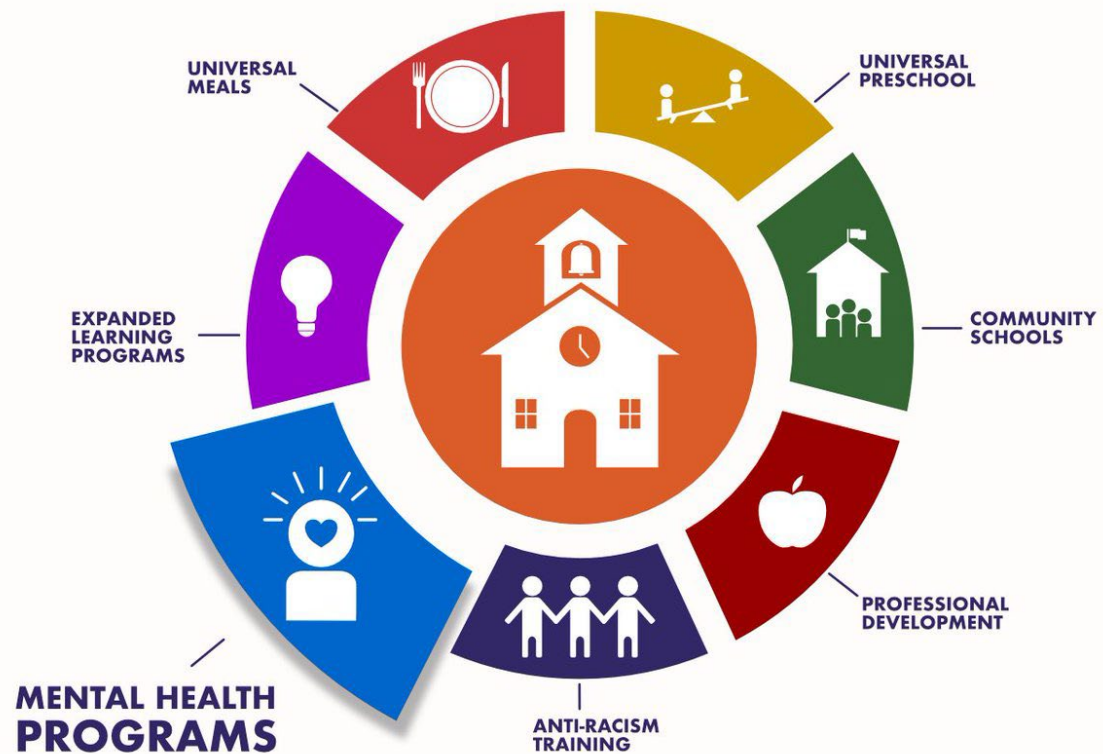
CHARTER BOARD MEETING WEDNESDAY, JUNE 14, 2023



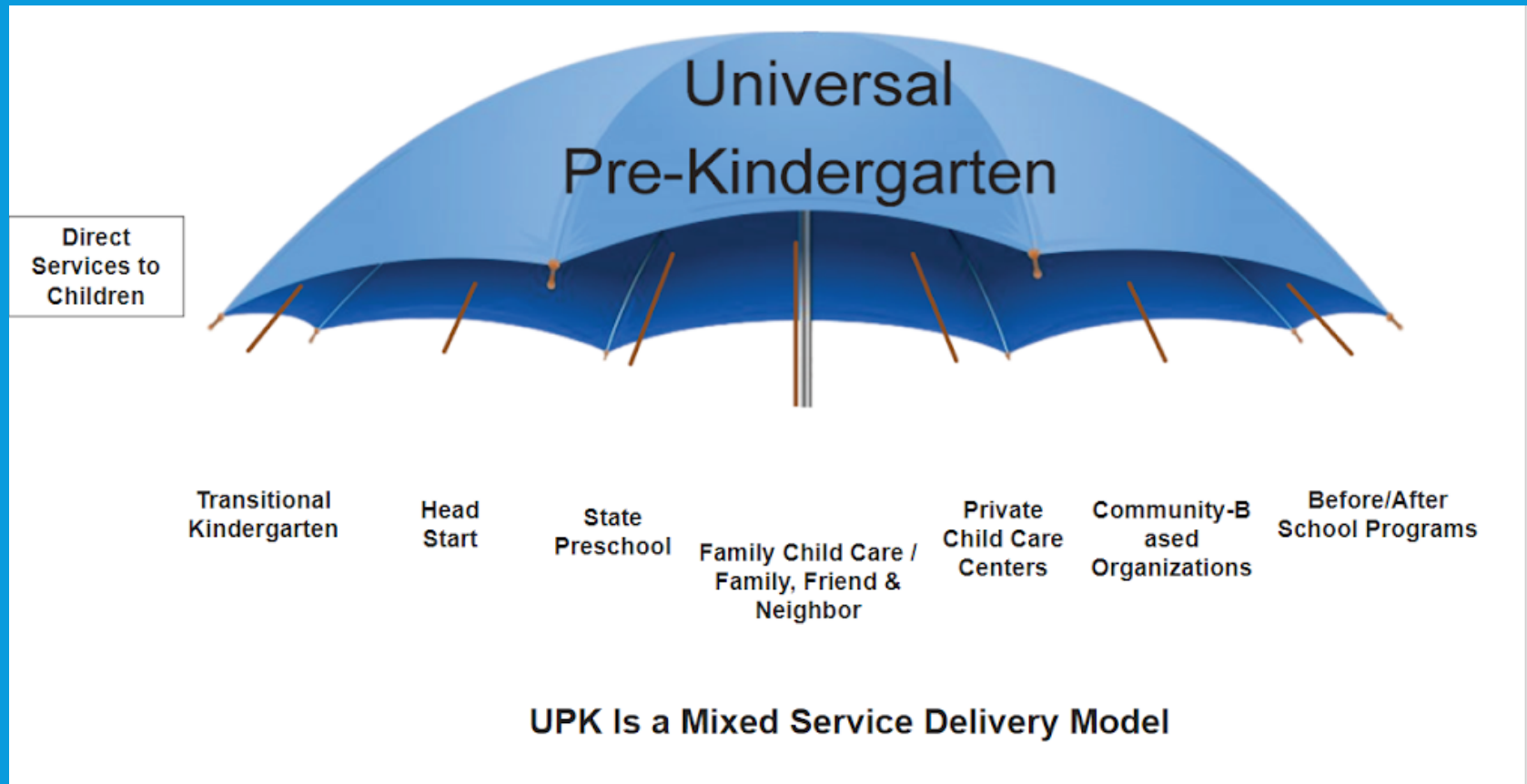
California State Initiatives



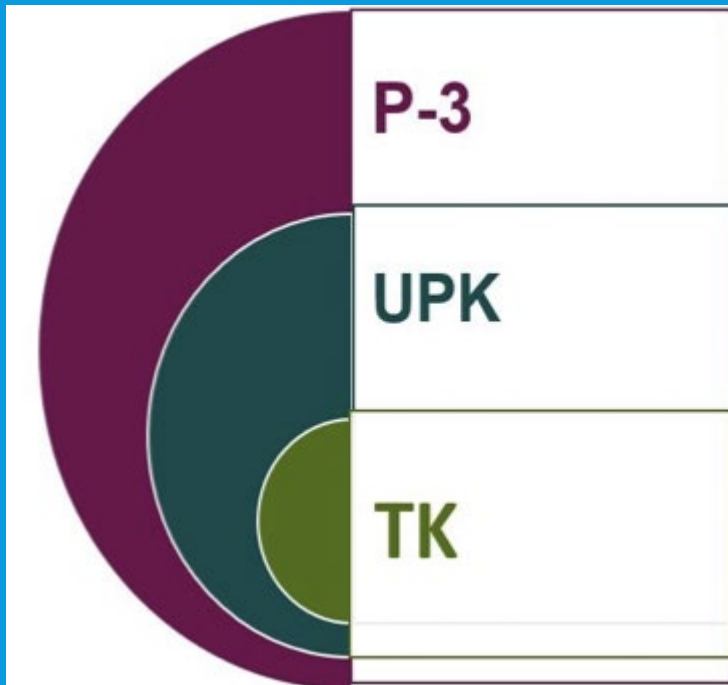
TRANSFORMING CALIFORNIA SCHOOLS



UNIVERSAL PREKINDERGARTEN



PK – 3RD GRADE ALIGNMENT



UPK is a mixed-delivery system of UTK, CSPP, Head Start, private providers, and more

Provides every four-year old access to high quality learning the year before kindergarten

TK as a service delivery option, is an integral program in the mixed delivery system for achieving UPK

P-3 Connects UPK with Kindergarten, 1st, 2nd, and 3rd grade

Aligning developmentally informed best practices, UPK– 3rd grade.



AUTHORIZER (LAUSD) OVERSIGHT VISIT FOR 2022-2023

*The following are results of the Los Angeles Unified School District Charter Schools Division Comprehensive Oversight/Evaluation Visit to PUENTE during the 2022-2023 school year
(on a scale of 1 to 4; with 4 being the highest):*

- ***Programs, Management & Operations:*** **4**
(Accomplished School Operations)
- ***Governance:*** **4**
- ***Fiscal:*** **3**
- ***Student Achievement:*** **3**





Academic Year 2023-2024 Calendar

2023-2024 Academic Year
Begins Monday, August 14
and
Concludes on June 6 (180
Days)



PUENTE Charter School 2023-2024 School Calendar | Calendario escolar

July Julio						
Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

August Agosto						
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26	27	28	29	30	31	

September Septiembre						
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17	18	19	20	21	22	23
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October Octubre						
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22	23	24	25	26	27	28
29	30	31				

November Noviembre						
Su	Mo	Tu	We	Th	Fr	Sa
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26	27	28	29	30		

December Diciembre						
Su	Mo	Tu	We	Th	Fr	Sa
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17	18	19	20	21	22	23
24	25	26	27	28	29	30

January Enero						
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7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

February Febrero						
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4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

March Marzo						
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14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

May Mayo						
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26	27	28	29	30	31	

June Junio						
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						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

Instructional/Event Day Color Key

Summer School (ELOP)	
Escuela de Verano (ELOP)	
No classes: Holiday or Pupil Free Day	
No Clases: Días festivos o Día para Estudiantes	
Instructional Day	
Día de Instrucción	

Clave de color del Día de Instrucción/ Eventos

PUENTE Charter School Parent Event	
Evento de Padres de PUENTE Charter School	
PUENTE Learning Center Event	
Evento de PUENTE Learning Center	
Parent Conferences	
Conferencias de Padres	

*Events are subject to change for updated information please consult ParentSquare. *Los eventos están sujetos a cambios para obtener información actualizada, consulte ParentSquare.



Academic Year 2023-2024

Calendar

For Approval

- INSTRUCTIONAL CALENDAR FOR 2023-2024 WILL FOLLOW THE LAUSD BOARD-APPROVED CALENDAR FOR DISTRICT SCHOOLS. SCHOOL BEGINS AUGUST 14, 2023 AND CONCLUDES JUNE 6, 2024

- HOLIDAY BREAKS AT THANKSGIVING, WINTER, SPRING AND RECOGNIZED FEDERAL/STATE HOLIDAYS

- PUENTE WILL OFFER 180 DAYS OF INSTRUCTION

BOARD ACTION: APPROVE THE 2023-2024 PUENTE CHARTER SCHOOL INSTRUCTIONAL CALENDAR



Local Control Funding Formula Guide (Priorities for the Use of Revenue)

Designates state funds to be used for
“State Priorities” for school operation

- Student Achievement
- Student Engagement
- Parental Involvement
- Implementation of Common Core
- School Climate (School Culture & Client Satisfaction)
- Basic Services (including facilities in good repair and access to standards-aligned instructional materials)



PUENTE Priorities for 2023-2024 School Year

Instructional Priorities – Data Informed Practices:

- Ensure school spaces are compliant
- Assess students with the standardized testing tools
- ELPAC – English Language Proficiency Assessments for California to exceed English language proficiency level and our Reclassification rate for 22-23
- NWEA-MAP for grade-level mastery (below; near; met or exceeds)
- Strengthen our school “safe-place” designation and support social-emotional development
- Provide intensity of support for occurrences of learning loss
- Partner with families to meet the needs of each student





Local Control Accountability Plan

Local Control Funding Formula (LCFF), the supplemental and concentration grants, and the additional state, local and federal funds of \$5.9 million will support the following FY24 data goals:

- ✓ Maintain a 95% daily attendance average
- ✓ Maintain and/or exceed reclassification rate of 33%
- ✓ Maintain and/or exceed the Common Core English Language Arts & Mathematics mastery rate from 22-23
- ✓ Offer weekly Friday professional development sessions to instructional team in support of deepening PUENTE's student progress monitoring school operations
- ✓ Strengthen social-emotional learning supports
- ✓ Maintain designated service to the special education students
- ✓ Maintain meal program service
- ✓ Maintain after school program service
- ✓ Provide Gifted & Talented Education (GATE)
- ✓ Build on parent involvement to the school community





LCAP GOALS

- **GOAL #1:** Continue to implement a “whole child approach” through MTSS, addressing the academic, social-emotional, behavioral, and/or mental health needs of our students through standards-aligned culturally relevant learning.
- **GOAL #2:** Continue to provide evidence-based professional learning opportunities for all educators, instructional support staff and administrators to build capacity, support teacher retention, to address the diverse learning needs of our students.
- **GOAL #3:** Engage educational partners to design and implement strategies to engage parents/families in our school community, and solicit input in decision-making that will impact student outcomes.



Special Education Contracts For Approval

PUENTE SERVES APPROXIMATELY 5 – 10% SPECIAL EDUCATION STUDENTS EVERY ACADEMIC YEAR

- CONTRACT SERVICES PROVIDE THE NEEDED SUPPORT INCLUDING SPEECH AND LANGUAGE AND RESOURCE SPECIALIST PROGRAM

- PUENTE HOLDS A CONTRACT WITH COMPREHENSIVE THERAPY ASSOCIATES (CTA), WHICH ARE FEE FOR SERVICES CONTRACTS

BOARD ACTION: APPROVE THE RENEWAL OF THE CTA CONTRACT FOR THE 2023-2023 ACADEMIC YEAR



Comprehensive Therapy Associates, Inc.
Puente Charter
2023-2024 School Year

COMPREHENSIVE THERAPY ASSOCIATES, INC.

Comp Therapy

SERVICES AND CONSULTING AGREEMENT

This Services and Consulting Agreement (this "Agreement") is entered into effect as of July 1st, 2023, by and between Comprehensive Therapy Associates, Inc. ("Comp Therapy") located at 1017 N. Lake St. Burbank, CA 91502 and PUENTE Charter ("Client") located at 501 S Boyle Ave, Los Angeles, CA 90033 ("service location").

RECITALS

Comp Therapy is a registered Non-Public Agency (NPA Code: 1A-19-532) with the California Department of Education.

WHEREAS, Client is a California nonprofit public benefit corporation that offers educational programs to students identified at its public or private schools ("Service Location"); and

WHEREAS, Comp Therapy wishes to provide certain services with respect to education and/or other social services to Client at the Service Location (the "Services");

NOW THEREFORE, in consideration of the premises and covenants herein contained, and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the parties hereto agree as follows:

AGREEMENT

In consideration of the promises and covenants contained herein, the parties agree as follows:

1. COMMENCEMENT DATE AND TERM

This Agreement shall commence at 12:01 a.m. on July 1st, 2023 (the "Commencement Date") and shall continue until 11:59 p.m. on June 30th, 2024 (the "Term").



Food Service Management Company Renewal for 2023-2024 For Approval

- 1) PUEENTE Meal Program provider for four years –
- 2) Adheres to meal requirements as per the U.S. Dept. of Agriculture
- 3) Food Service is compliant with the *Code of Federal Regulations for Meals*
- 4) Quality food products
- 5) Responsive and reliable service
- 6) Overall student and parent satisfaction
- 7) Adhere to safety protocols

Board Action: : Approve the extension of the school food service contract with School Nutrition Plus for the 2023-2024 academic year.

California Department of Education
Nutrition Services Division
Form ID PRU-07b

Procurement Resources Unit
January 2022

CONTRACT EXTENSION

☐ CHECK HERE IF ADDITIONAL PAGES ARE ATTACHED

Pages

Renewal (Extension Number)	Agreement Number (Base year)
1	201602

1. This Extension Agreement is entered into between the School Food Authority and Contractor named below:

SCHOOL FOOD AUTHORITY'S NAME

PUEENTE Learning Center

FOOD SERVICE MANAGEMENT COMPANY'S NAME AND FEDERAL TAX IDENTIFICATION NUMBER

School Nutrition Plus

2. Base year contract term: Effective date: **7/1/2022** Expiration date: **6/30/2023**

Extension year: Effective date: **7/1/2023** Expiration date: **6/30/2024**

3. The maximum dollar amount of this contract is equal to the fixed cost per meal multiplied by the number of meals:
\$253,165.50 (maximum dollar amount)



After School Provider Think Together
Renewal for 2023-2024
Informational

- 1) PUENTE After School provider for four years . Current approved contract extends to June 2024
- 2) Offers extended school services until 6 pm, Monday through Friday
- 3) Provides on-site coordinator and classroom instructors
- 4) Provides additional support for additional 30 days of instruction during summer, with each day operating for 9 hours
- 5) Favorable feedback from student and parent community



June 5, 2023

PUENTE LEARNING CENTER

Think Together Expanded Learning Services Program

Background

Puente Learning Center (PLC) has solicited Think Together to expand enrollment at After School Education and Safety (ASES) programs operating within the Charter during the 2023/24 school year. This proposal responds to that request.



UPDATE ON 4TH RENEWAL FOR PUENTE CHARTER SCHOOL

Pending California state legislation, all LAUSD charter schools that would renew their petitions are receiving another one-year extension to their current petitions due to COVID-19 impact on outcomes data.

PUENTE's current petition will extend through June 30, 2025.





LOS ANGELES UNIFIED SCHOOL DISTRICT

CHARTER SCHOOLS DIVISION

ANNUAL PERFORMANCE-BASED OVERSIGHT VISIT REPORT*

2022-2023 SCHOOL YEAR

FOR

PUENTE CHARTER (2621)

Name and Location Code of Charter School

LAUSD Vision

L.A. Unified will be a progressive global leader in education, providing a dynamic and inspiring learning experience where all students graduate ready for success.

CSD Mission

The LAUSD Charter Schools Division (CSD) fosters high quality educational opportunities and outcomes for students in the greater Los Angeles community through exemplary charter public school authorizing, oversight, and sharing of promising practices so that all students maximize their potential.

CSD Core Values

We believe that our success depends on:

- Making decisions that put the interests of students first.
- Serving with high expectations, integrity, professionalism, and commitment.
- Employing authentic, responsive, and effective leadership and teamwork.
- Continuously learning as a dynamic organization.
- Building and sustaining a healthy workplace culture where high performance, diversity, and creativity thrive.
- Developing productive relationships with our charter schools and all stakeholders.

* Charter School shall comply in a timely manner with all applicable federal and state laws and regulations, as they may change from time to time, including but not limited to matters related to the school's governance, programs, facilities, operations, and/or fiscal management. Elements of the oversight process may be modified as LAUSD continues to



respond to the COVID-19 pandemic. To support the well-being of all at a school site, all are expected to follow applicable COVID-19 public health guidelines, including related District requirements for operations at District facilities. The assigned CSD Administrator will provide any updated information reach out with more details, as needed.

Charter School Name:	Puente Charter Elementary			Location Code:	2621
Current Address:	City:	ZIP Code:	Phone:	Fax:	
501 S. Boyle Heights Ave.	Los Angeles	90003	323-780-8900		
Current Term of Charter¹:		LAUSD Board District:	LAUSD Region:		
July 1, 2017 to June 30, 2022		2	East		
Number of Students Currently Enrolled:	Enrollment Capacity Per Charter:	Number Above/Below Enrollment Capacity (day of visit):		Below By 13	
287	300 (PER MATERIAL REVISION)				
Grades Currently Served:	Grades To Be Served Per Charter:	Percent Above/Below Enrollment Capacity (day of visit):		Below By 4.33%	
TK-5	TK-5 (PER MATERIAL REVISION)				
Norm Enrollment Number:	300				
Total Number of Staff Members:	33	Certificated:	14	Classified:	19
Charter School's Leadership Team Members:	Brenda Meza, Principal; Jerome Greening, CEO; Diana Juarez, Vice Principal; Isabel Salas, Director of SPED, Daniela Garcia, Comp Therapy Case Manager; Angelica Castro, VP of Finance and Administration				
Charter School's Contact for Special Education:	Isabel Salas, Director of Special Ed.	SELPA & Option:	2		
CSD Assigned Administrator:	Fabiola Garcia De Alba, Specialist	CSD Fiscal Services Manager:	Helena Han		
Other School/CSD Team Members:	N/A				
Oversight Visit Date(s):	March 22, 2023 & March 28, 2023		Fiscal Review Date (if different):	N/A	
Is school located on a District facility? If so, please indicate the applicable program (e.g. Prop 39, PSC, conversion, etc.):	N/A		LAUSD Co-Location Campus(es) (if applicable):	N/A	
Certificate of Occupancy (COO) or Temporary Certificate of Occupancy Type: (if a TCO, please note expiration date)	COO		COO/TCO Approved Grade Levels and Occupancy Loads:	Max Capacity 400 Elementary	

¹ AB 130 added Section 47607.4 to the California Education Code (Ed. Code), which extends the term of all charter schools whose term expires on or between January 1, 2022, and June 30, 2025, inclusive, by two years.



SUMMARY OF RATINGS			
<i>(4)=Accomplished (3)=Proficient (2)=Developing (1)=Unsatisfactory</i>			
Governance	Student Achievement and Educational Performance	Organizational Management, Programs, and Operations	Fiscal Operations
4, Accomplished	3, Proficient	4, Accomplished	3, Proficient

**CHARTER RENEWAL CRITERIA**

In accordance with Education Code §§ 47605, 47607, and 47607.2, in order to renew a charter, the District must determine whether the charter school has met the statutory requirements.

REPORT GUIDE

LAUSD's oversight procedures are intended to balance a charter school's autonomy of operation with its accountability to the public. LAUSD utilizes a holistic, performance-based approach to evaluate all charter schools, guided principally by making decisions in the best interest of students. The CSD observes and monitors each charter school in accordance with applicable laws, regulations, LAUSD policy, memoranda of understanding, and the school's operative charter. Information gathered through oversight serves as part of the charter school's ongoing record for the District to make informed decisions about charter school authorization, renewal, material revisions, sharing of promising practices, and if need be, revocation. While LAUSD is responsible to provide oversight of its charter schools and the entities managing charter schools, the primary oversight of each charter school must first and foremost be performed by the charter school's own Governing Board. The Governing Board of a charter school has an ongoing responsibility to oversee the operations of its charter school(s), ensuring that every charter school it oversees is providing a high-quality educational program for students enrolled, is successfully fulfilling the terms of their charter, is fiscally sound, and complies with applicable laws, regulations, and court orders. In designing this document, the District has considered California charter school law, as well as the *LAUSD Policy and Procedures for Charter Schools*, California State Board of Education's criteria for evaluating charter schools, and the National Association of Charter School Authorizers' *Principles and Standards of Quality Authorizing*. This reporting tool provides guidelines and criteria used by the CSD to observe, record, assess, and reflect with the charter school on school performance as captured during the annual oversight visit process in these four categories:

Governance – demonstrating fulfillment of the Governing Board's fiduciary responsibility to effectively direct and provide oversight for the charter public school, including but not limited to enactment and monitoring of policies and procedures to ensure the school's full compliance with applicable law, policy, and the terms of the charter approved by the LAUSD Board of Education

Student Achievement and Educational Performance – demonstrating positive academic achievement and growth for all students

Organizational Management, Programs, and Operations – demonstrating effective leadership and implementation of the governing board's policies and procedures, as well as the school's educational program and systems and procedures for the day-to-day operations of the school

Fiscal Operations – demonstrating sound fiscal management, appropriate use of public funds, and compliance with regulatory requirements

This report, including the ratings in each category, is based on information and evidence gathered at the time of the annual oversight visit. The CSD considers evidence provided through CSD staff observations, document review, interviews, and discussion with school representatives and stakeholders. All charter schools are expected to prepare for the visit and have available, as applicable, all documentation requested in the *Annual Performance Based Oversight Visit Preparation Guide 2022-2023*. The "Sources of Evidence" sections below identify key information sources generally relevant to their respective indicators; these lists are not exhaustive, however, and some items may not be applicable to the grades served. Schools may present additional evidence as deemed relevant and appropriate. As needed, CSD staff also may request additional information and/or documentation prior to, during, and/or following the visit.

The tool employs the following four-point rubric to rate the school's performance in each category: (4) *Accomplished*, (3) *Proficient*, (2) *Developing*, and (1) *Unsatisfactory*. In addition, the *Summary of School Performance* section in each category captures key findings under one or more of the following headings: (1) Areas of Demonstrated Strength and/or Progress (Note: potential "promising practices" are identified within this section with an asterisk [*]); (2) Areas Noted for Further Growth and/or Improvement; and, if applicable, (3) Corrective Action Required. Under "Corrective Action Required," the CSD reports findings of material noncompliance with applicable law, LAUSD charter policy, or the school's approved charter. **If the report includes any findings under "Corrective Action Required," the charter school must take immediate and appropriate steps to remedy the identified concern.** In accordance with its "tiered intervention" approach to charter school non-compliance and poor performance, the CSD may also send the school appropriate notices, separate and apart from this report, to provide and document time-specific follow-up, as necessary. At the other end of the spectrum of performance, any school that earns a rating of *Accomplished* in any category is encouraged to submit to the CSD a summary of those "promising practices" that the school believes have contributed to its success, in order to support the CSD's ongoing efforts to promote and facilitate reciprocal sharing of promising practices among education leaders from across all LAUSD schools.



GOVERNANCE	RATING*
Summary of School Performance	4, Accomplished
<u>Areas of Demonstrated Strength and/or Progress</u>	
G1: GOVERNANCE STRUCTURE AND EVALUATION OF SCHOOL LEADER(S)	
Governing Board has fully implemented the organizational structure set forth in approved charter, including evidence of seeking input from all committees/councils, and a well-developed system for the evaluation of the school's executive level leadership.	
<ul style="list-style-type: none">As per evidence provided by the Charter in Binder 1 as response to CSD inquiries, the following information is present; Bylaws (signed 12/2/17 and executed on 1/24/18), Board member roster, agendas and minutes. Currently, there are 7 Board members. Organizational Chart 2022-2023 shows Executive Director oversees Principal, VP of Programs, Director of Early Education, VP of Finance, and VP Advancement which oversee the school-based positions. Binder 1 also shows evidence of the school's Committee/council calendars, agendas, roster(s), and sign-ins for Charter School Advisory and Wellness Committee, English Learner Advisory Committee (ELAC), Puente Charter Advisory Committee and Finance Committee.	
G2: BROWN ACT	
The Governing Board complies with all material provisions of the Brown Act. Per evidence provided on the school's website and in Binder 1, the school board held Brown Act training on April 20, 2022.	
<ul style="list-style-type: none">Based on the review of Binder 1, review of the School's Website, and discussion with school's leadership team, the governing board agendas are posted within the 72 hours required notice for regular meetings and within 24 hours for special meetings. Documentation provided by Charter provides evidence of the board approved meetings, agendas, minutes and board meeting calendar which shows that regular governing board meetings occur monthly (9/21/22, 12/07/22, 2/22/23, and 6/14/23).	
G3: DUE PROCESS	
The Governing Board has systems in place to ensure that the school provides adequate due process, in accordance with applicable law, the charter, and LAUSD charter policy, for students, employees, parents, and the public.	
<ul style="list-style-type: none">Documentation provided by the Charter school during Oversight visit and in response to CSD inquiries include but are not limited to the following; Board meeting agendas and minutes, 2022-2023 Parent Students Handbook, Employee Handbook, and the school's Uniform Complaint Procedures. The Parent student handbook contains health and student safety, communication, complaint resolution and student discipline, as well as the following policies; Title IX, Harassment, Discrimination Intimidation, Bullying policy, Suspension and Expulsion, Uniform complaint policy and suicide prevention policy.	
G4: RESPONSIVE AND ACCOUNTABLE GOVERNANCE	
The Governing Board regularly considers school performance data, stakeholder input, and other data to inform decision-making (e.g., approving action plans, resources, evaluation criteria)	



- Documentation review and discussion with school leadership, along with observation of governing board meetings, showed the governing board implements decision making and monitoring systems that include Compliance collective reports, multiple stakeholder input and feedback, analysis of data reports, including but not limited to Instruction, assessments, Dashboard Indicators, enrollment and staffing data, and CAASPP.

Areas Noted for Further Growth and/or Improvement

None

Corrective Action Required

None noted that require immediate action to remedy concerns indicated in this report.

Notes:

None

****NOTE: A charter school may receive a rating of 1 in this category for the following: (1) Evidence of conflict (s) of interest within the organization (i.e. Governing Board, staff, contracted external parties, etc.), (2) School is in breach of the operative charter, including Federal, State, and District Required Language, (3) School is "Not in Good Standing", and/or (4) If there are serious concerns related to fiscal matters (e.g., negative financial condition, fiscal mismanagement, and/or significant audit findings, etc.).***

**G1: GOVERNANCE STRUCTURE AND EVALUATION OF SCHOOL LEADER(S) - QUALITY INDICATOR #1**

The Governing Board has implemented the organizational structure, roles and responsibilities set forth in the approved charter, including:

- Governing Board composition, structure, roles, and responsibilities as set forth in the approved charter
- Governing Board seeks input from committees/councils described in the school's charter including but not limited to those mandated by laws or regulations as applicable (e.g., School Site Council and English Learner Advisory Committee)
- Evaluation of school's executive level leadership (including, but not limited to, those positions reporting to the Governing Board, as indicated in Element 4 of the approved charter, such as Executive Director, Area Superintendent, Principal, etc.)

Rubric		Sources of Evidence
Performance	<ul style="list-style-type: none"><input type="checkbox"/> The Governing Board has fully implemented the organizational structure set forth in approved charter, including evidence of seeking input from all committees/councils, and a well-developed system for the evaluation of the school's executive level leadership<input checked="" type="checkbox"/> The Governing Board has fully implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and a system for the evaluation of the school's executive level leadership<input type="checkbox"/> The Governing Board has partially implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and a system for the evaluation of the school's executive level leadership<input type="checkbox"/> The Governing Board has not implemented the organizational structure set forth in approved charter, nor any mandated committees/councils or a system for the evaluation of the school's executive level leadership	<ul style="list-style-type: none"><input checked="" type="checkbox"/> Current organizational chart (B1.1a)<input type="checkbox"/> Organizational chart in Board approved charter (B1.1b)<input checked="" type="checkbox"/> Bylaws (B1.2)<input checked="" type="checkbox"/> Board member roster (B1.3)<input checked="" type="checkbox"/> Board meeting agendas and minutes (B1.4)<input checked="" type="checkbox"/> Observation of Governing Board meeting(s)<input checked="" type="checkbox"/> Committee/council calendars, agendas, roster(s), and sign-ins (B1.6)<input checked="" type="checkbox"/> Documentation related to system for evaluation of executive level leadership. (B1.7)<input checked="" type="checkbox"/> Discussion with leadership<input type="checkbox"/> Other: (Specify)

**G2: BROWN ACT - QUALITY INDICATOR #2**

The Governing Board has a system in place to ensure it is adhering to applicable open meeting requirements, which protect the public interest in transparency and help to ensure that decisions are made without apparent or actual conflicts of interest:

- Governing Board meetings occur regularly, are conducted openly, and provide opportunity for public participation in accordance with the Ralph M. Brown Act ("Brown Act") (Gov. Code, §§54950, et seq.)
- Governing Board holds its meetings at a location(s) and in a manner that complies with applicable Brown Act requirements and Ed. Code, §47604.1, including but not limited to teleconferencing, closed session, public comment, and Reasonable Accommodations.
- The public has access to the meetings from a location(s) within the jurisdictional boundaries of LAUSD, as required by applicable Brown Act provisions, Ed. Code, § 47604.1(c)(1)(A) and as described in the approved charter.
- Governing Board meeting agendas contain adequate item descriptions and are posted on the school's website and on campus in accordance with the requirements of the Brown Act.
- Governing Board meetings are held in accordance with the Brown Act including the requirements set forth in Ed. Code § 47604.1.

Rubric		Sources of Evidence
Performance	<input checked="" type="checkbox"/> The Governing Board complies with all material provisions of the Brown Act <input type="checkbox"/> The Governing Board complies with most material provisions of the Brown Act <input type="checkbox"/> The Governing Board complies with some material provisions of the Brown Act <input type="checkbox"/> The Governing Board complies with few material provisions of the Brown Act	<input checked="" type="checkbox"/> Board meeting agendas (B1.4) <input checked="" type="checkbox"/> Board meeting calendar (B1.5) <input checked="" type="checkbox"/> Brown Act training documentation (B1.8a) <input checked="" type="checkbox"/> Compliance with E.C. 47604.1 (B1.8b) <input checked="" type="checkbox"/> Documentation of the school's agenda posting procedures (B1.9) <input checked="" type="checkbox"/> School website <input checked="" type="checkbox"/> Observation of Governing Board meeting(s) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)

**G3: DUE PROCESS - QUALITY INDICATOR #3**

The Governing Board has systems in place to ensure that the school provides adequate due process, in accordance with applicable law, the school's charter, and LAUSD charter school policy, to honor and protect the rights of students, employees, parents, and the public in the following areas:

- Student discipline
- Employee grievances and discipline
- Stakeholder complaint resolution pursuant to the Uniform Complaint Procedures (UCP)
- Parent/stakeholder complaint resolution for complaints outside regulatory scope of UCP

Rubric		Sources of Evidence
Performance	<ul style="list-style-type: none"><input type="checkbox"/> The Governing Board has well-developed systems in place to ensure that the school provides adequate due process, in accordance with applicable law, the charter, and LAUSD charter policy, for students, employees, parents, and the public<input checked="" type="checkbox"/> The Governing Board has systems in place to ensure that the school provides adequate due process, in accordance with applicable law, the charter, and LAUSD charter policy, for students, employees, parents, and the public<input type="checkbox"/> The Governing Board has partially developed systems in place to ensure that the school provides adequate due process, in accordance with applicable law, the charter, and LAUSD charter policy, for students, employees, parents, and the public<input type="checkbox"/> The Governing Board has minimal or no systems in place to ensure that the school provides adequate due process, in accordance with applicable law, the charter, and LAUSD charter policy, for students, employees, parents, and the public	<ul style="list-style-type: none"><input checked="" type="checkbox"/> Board meeting agendas and minutes (B1.4)<input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10a)<input checked="" type="checkbox"/> Employee Handbook(s) (B1.10b)<input checked="" type="checkbox"/> Uniform Complaint Procedures policy and form(s) (B1.11)<input checked="" type="checkbox"/> Stakeholder complaint procedures and form(s) (B1.12)<input checked="" type="checkbox"/> Human Resources (HR) policies and procedures (B1.13)<input checked="" type="checkbox"/> Observation of Governing Board meeting(s)<input type="checkbox"/> Discussion with school leadership<input type="checkbox"/> Other: (Specify)

**G4: RESPONSIVE AND ACCOUNTABLE GOVERNANCE - QUALITY INDICATOR #4*****The Governing Board has systems in place to ensure ongoing:***

- Review and use of academic performance data (e.g., CA School Dashboard, internal assessments, etc.) and other school data and information to ensure sound Governing Board decision-making in support of continuous improvement of student achievement, fiscal viability, compliance, and overall public school excellence
- Monitoring of the school's implementation of its Local Control and Accountability Plan (LCAP) and additional school plans, (e.g., Comprehensive Support and Improvement (CSI), Additional Targeted Support and Improvement (ATSI), School Plan for Student Achievement (SPSA), and action plans for making progress toward LCAP goals)
- Transparent governance and accountability to stakeholders, including consideration of input from the school's committees/councils and stakeholders
- Monitoring of staffing needs and the school's compliance with all applicable credentialing, clearance, and training requirements

Rubric		Sources of Evidence
Performance	<ul style="list-style-type: none"><input checked="" type="checkbox"/> The Governing Board regularly considers school performance data, stakeholder input, and other data to inform decision-making (e.g., approving action plans, resources, evaluation criteria)<input type="checkbox"/> The Governing Board considers school performance data, stakeholder input, and other data to inform decision-making (e.g., approving action plans, resources, evaluation criteria, etc.)<input type="checkbox"/> The Governing Board inconsistently considers school performance data, stakeholder input, and other data to inform decision-making (e.g., approving action plans, resources, evaluation criteria, etc.)<input type="checkbox"/> The Governing Board seldom considers school performance data, stakeholder input, and other data to inform decision-making (e.g., approving action plans, resources, evaluation criteria, etc.)	<ul style="list-style-type: none"><input checked="" type="checkbox"/> Board meeting agendas, minutes, and meeting materials for meetings at which the Board reviewed: (B1.14a)<ul style="list-style-type: none"><input checked="" type="checkbox"/> CA School Dashboard Academic Performance Indicators (ELA, MATH, ELPI, CCI)<input type="checkbox"/> CA School Dashboard Academic Engagement Indicators (Chronic Absenteeism, Graduation Rate)<input type="checkbox"/> CA School Dashboard Conditions and Climate Indicator (Suspension Rate)<input checked="" type="checkbox"/> Attendance rate<input type="checkbox"/> Internal assessment data<input checked="" type="checkbox"/> Enrollment data<input type="checkbox"/> Staffing data (retention, turnover, certification, etc.)<input checked="" type="checkbox"/> Board meeting calendar (B1.5)<input checked="" type="checkbox"/> Human Resources (HR) policies and procedures (B1.13)<input checked="" type="checkbox"/> Other evidence of a system for Board review and analysis of internal school data to inform decision-making (B1.14b)<input type="checkbox"/> Documentation of Board member and/or executive leadership training on topics that support responsive and accountable governance (e.g., data-driven decision making, Board roles and responsibilities, etc.) (B1.14c)<input checked="" type="checkbox"/> Observation of Governing Board meeting(s)<input checked="" type="checkbox"/> Discussion with school leadership<input type="checkbox"/> Stakeholder focus group<input type="checkbox"/> Other: (Specify)

**G5: FISCAL CONDITION - GOVERNANCE QUALITY INDICATOR #5*****The Governing Board has a system in place to ensure fiscal viability:***

- The school is fiscally strong and net assets are positive in the prior two independent audit reports.
- If applicable, all LAUSD Board of Education-approved fiscal condition-related benchmark(s) are met by the required deadline(s).

Rubric		Sources of Evidence
Performance	<div><input checked="" type="checkbox"/> The school is fiscally strong with positive net assets in the prior two independent audit reports, and, if applicable, all LAUSD Board of Education-approved fiscal-condition related benchmark(s) are met by the required deadline(s)</div> <div><input type="checkbox"/> The school is fiscally stable, with positive net assets in the most current independent audit report*</div> <div><input type="checkbox"/> The school is fiscally weak or unstable**, net assets are negative in the most current independent audit report, or the school does not have an independent audit report on file with the Charter Schools Division*</div> <div><input type="checkbox"/> The school is consistently fiscally weak, net assets are negative in the prior two independent audit reports, or the school does not have an independent audit report on file with the Charter Schools Division*</div> <p>*Additional considerations that could influence the rating may include: inadequate cash flow; financial condition and/or enrollment reflecting a downward trend and/or beginning to show signs of deteriorating financial health potentially leading to negative net assets in the current fiscal year and/or the foreseeable future fiscal years; multi-year reliance on financing resources for the school's operations (e.g., factoring of receivables, intraorganizational loans, third party loans, continuing deficit spending, etc.); or that the school may not be able to carry out quality educational programs when the student enrollment drops to a certain level.</p> <p>**For example, the school's financial condition fluctuates from year to year, with significant net losses, leading to negative net assets in the current fiscal year and/or the foreseeable future fiscal years.</p>	<div><input checked="" type="checkbox"/> Board meeting agendas and minutes (B1.4)</div> <div><input checked="" type="checkbox"/> Other evidence of a system for Board review and monitoring of fiscal policies, procedures, budget, and finances (B1.15)</div> <div><input checked="" type="checkbox"/> Observation of Governing Board meeting</div> <div><input checked="" type="checkbox"/> Discussion with leadership</div> <div><input checked="" type="checkbox"/> Independent audit report(s)</div> <div><input checked="" type="checkbox"/> Other financial information submitted by the school</div> <div><input checked="" type="checkbox"/> Other: (see Fiscal Operations section below)</div>

**G6: FISCAL MANAGEMENT AND ACCOUNTABILITY - GOVERNANCE QUALITY INDICATOR #6***The Governing Board has a system in place to ensure sound fiscal management and accountability:*

- The school adheres to the Governing Board approved fiscal policies and procedures, and does not have any areas noted for improvement.
- The two most current annual independent audits show no material weaknesses, deficiencies, and/or findings.

Rubric		Sources of Evidence
Performance	<ul style="list-style-type: none"><input type="checkbox"/> The school consistently adheres to the Governing Board approved fiscal policies and procedures, does not have any areas noted for improvement, and the two most current annual independent audits show no material weaknesses, deficiencies, and/or findings<input checked="" type="checkbox"/> The school generally adheres to the Governing Board approved fiscal policies and procedures, but has areas noted for improvement, and the most current annual independent audit shows no material weaknesses, deficiencies, and/or findings<input type="checkbox"/> The school is not adhering to the Governing Board approved fiscal policies and procedures, and has areas noted for improvement, or has significant fiscal-related issues (e.g., fiscal mismanagement, audit findings, unresolved recurring issues, potential conflicts of interest, etc.)<input type="checkbox"/> The school is continuously not adhering to the Governing Board approved fiscal policies and procedures, or has significant and recurring fiscal-related issues (e.g., fiscal mismanagement, audit findings, potential conflicts of interest, etc.)	<ul style="list-style-type: none"><input checked="" type="checkbox"/> Board meeting agendas and minutes (B1.4)<input checked="" type="checkbox"/> Other evidence of a system for Board review and monitoring of fiscal policies, procedures, budget, and finances (B1.15)<input checked="" type="checkbox"/> Observation of Governing Board meeting<input checked="" type="checkbox"/> Discussion with leadership<input checked="" type="checkbox"/> Independent audit report(s)<input checked="" type="checkbox"/> Other: (see Fiscal Operations section below)

Progress on LAUSD Board of Education Benchmarks and/or MOU related to GOVERNANCE (if applicable):

N/A



STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE	RATING*
Summary of School Performance	3, Proficient
2020 California Department of Education's (CDE) Charter School's Performance Category	Middle Performing
<p>Does the charter school qualify for technical assistance? <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO</p> <p>Is the charter school a state-identified school under the Every Student Succeeds Act (ESSA)? <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO</p> <p>If yes, what is the school's identification? (See additional information within "Notes" section below)</p> <p><input type="checkbox"/> Comprehensive Support and Improvement (CSI)</p> <p><input type="checkbox"/> Additional Targeted Support and Improvement (ATSI)</p>	
<p>Areas of Demonstrated Strength and/or Progress</p> <p>A1: DASHBOARD SCHOOLWIDE ELA INDICATOR</p> <ul style="list-style-type: none">The schoolwide Dashboard ELA Indicator Status Level is "Medium" with a Distance from Standard (DFS) 1.1, which is higher than the State's DFS of -12.2. Per school leadership, Puente Charter has various supports in place to continue to support all students in English Language Arts. These include but are not limited to differentiated instruction, improvements with technology integration, data-driven instruction, high quality professional development, and family and community engagement. <p>A2: DASHBOARD SCHOOLWIDE MATH INDICATOR</p> <p>The schoolwide Dashboard Math Indicator Status Level is "Medium" with a Distance from Standard (DFS) -2.4, which is higher than the State's DFS of -51.7. Per school leadership, Puente Charter has various supports in place to continue to support all students in the area of Mathematics. These supports include but are not limited to the use of CGI Math, (which supports differentiated instruction based on individual needs of students), and IXL Math online learning program (provides practice problems and interactive activities for students).</p> <p>A3: DASHBOARD SCHOOLWIDE ENGLISH LEARNER PROGRESS INDICATOR (ELPI)</p> <ul style="list-style-type: none">The schoolwide Dashboard ELPI Status is "Very High" 75.4% which is higher to state status of Medium at 50.3%. <p>A6: DASHBOARD SCHOOLWIDE SUSPENSION RATE INDICATOR</p> <ul style="list-style-type: none">The schoolwide Dashboard Suspension Rate Indicator Status is "Very Low" at 0.0% and lower than the statewide DFS. Puente Charter continues to support students by providing a school-wide Positive Behavior Support such as "High Five" strategies. <p>A8: DASHBOARD STUDENT GROUP ELA</p> <ul style="list-style-type: none">All numerically significant student groups (English Learners, Latino, and Socioeconomically Disadvantaged) have a "Status/Distance From Standard (DFS)" scores higher than the statewide DFS.	

**A9: DASHBOARD STUDENT GROUP MATH**

- All numerically significant student groups (English Learners, Latino, and Socioeconomically Disadvantaged) have “Status/DFS” scores **higher** than the statewide DFS.

Areas Noted for Further Growth and/or Improvement**A5: DASHBOARD SCHOOLWIDE CHRONIC ABSENTEEISM INDICATOR - (GRADES K-8)**

- The schoolwide Chronic Absenteeism Rate Indicator Status is at 21.2% status “Very High.” Per Puente Charter school Leadership, in order to reduce the percentage of students that are absent 10 or more days, the School will utilize a plan that includes preventative measures that include but are not limited to incentives for perfect attendance, school maintaining regular communication with families about attendance expectations, offer resources such as counseling and involve parents and caregivers in decision making through attendance review meetings.

Areas Noted for Further Growth and/or Improvement

None

Corrective Action Required

None noted that require immediate action to remedy concerns indicated in this report.

Notes:

Due to the COVID-19 pandemic, state law suspended the reporting of state measures on the 2021 California School Dashboard. The color-coded performance level or Change level will not be issued due to the suspension of state measures on the 2021 Dashboard and not having two consecutive years of reported data. Accordingly, indicators in the Student Achievement and Educational Performance category for the 2022-2023 Annual Performance-Based Oversight Report are scored based on 2022 Status level data except for the College/Career Indicator (CCI), as CAASPP testing was optional for the 2020-2021 school year. CCI will resume with “Status Only” reporting on the 2023 Dashboard.

A11: As of the time of the issuance of this Annual Performance-Based Oversight Visit Report, the state has not published the “Annual Reclassification (RFEP) Counts and Rates” for the 2021-2022 academic year. Considering this fact, the 2022- 2023 Annual Performance-Based Oversight Visit Report does not rate the Student Achievement and Educational Performance indicator “A11: English Learner Reclassification.” Please note that, depending on the release date of the 2021-2022 RFEP counts and rates, the District may elect to update and reissue a revised 2022-2023 Annual Performance-Based Oversight Visit Report with indicator A11 rated and calculated into the final overall Student Achievement and Educational Performance category rating.

The school employs the following English Learner (EL) Reclassification Criteria:



English Language Learners are reclassified to Fluent-English proficient based on the following multiple criteria, in alignment with California EC Section 313 and Title 5 California code of regulations (5CCR) section 11303. Our LEA continue to establish reclassification policies and procedures based on the four criteria: and the State Board of Education recommendations:

- 1 Assessment of language proficiency, using an objective assessment instrument, including but not limited to , the state test of ELPAC; and
2. Teacher evaluation, including but not limited to, a review of the student's curriculum Mastery; and
3. Parent/Guardian opinion and consultation; and
4. Comparison of student performance in basic skills against an empirically established range of performance in basic skills based on the performance of English proficient students of the same age.

☐ Rate of “**At Risk**” ELs is **Higher** in comparison to the state average

☐ Rate of “**LTEs**” is **Lower** in comparison to the state average

Graduation Criteria (high schools only):

****NOTE: A charter school cannot receive a rating in this category greater than a 1 if the school has been identified as Low performing charter school based on the state's published list. (Not applicable for the 2022-2023 school year due to the absence of updated performance classification. Will resume with updated performance classification published by the state.)***

**A1: DASHBOARD SCHOOLWIDE ELA INDICATOR - QUALITY INDICATOR #1**

The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:

- California School Dashboard Schoolwide ELA data (CDE)

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The schoolwide Dashboard ELA Indicator Status is Very High <input checked="" type="checkbox"/> The schoolwide Dashboard ELA Indicator Status is High; or Medium and at/above statewide Distance From Standard ("DFS") <input type="checkbox"/> The schoolwide Dashboard ELA Indicator Status is Medium and below statewide DFS; or Low <input type="checkbox"/> The schoolwide Dashboard ELA Indicator Status is Very Low <input type="checkbox"/> Not Available - No Status assigned for the ELA Indicator on the Dashboard	<input checked="" type="checkbox"/> California School Dashboard Report (CDE) <input checked="" type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)

A2: DASHBOARD SCHOOLWIDE MATH INDICATOR - QUALITY INDICATOR #2

The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:

- California School Dashboard Schoolwide Math data (CDE)

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The schoolwide Dashboard Math Indicator Status is Very High <input checked="" type="checkbox"/> The schoolwide Dashboard Math Indicator Status is High; or Medium and at/above statewide DFS <input type="checkbox"/> The schoolwide Dashboard Math Indicator Status is Medium and below statewide DFS; or Low <input type="checkbox"/> The schoolwide Dashboard Math Indicator Status is Very Low <input type="checkbox"/> Not Available - No Status assigned for the Math Indicator on the Dashboard	<input checked="" type="checkbox"/> California School Dashboard Report (CDE) <input checked="" type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)

**A3: DASHBOARD SCHOOLWIDE ENGLISH LEARNER PROGRESS INDICATOR (ELPI) - QUALITY INDICATOR #3**

The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:

- California School Dashboard Schoolwide ELPI data (CDE)

Rubric		Sources of Evidence
Performance	<input checked="" type="checkbox"/> The schoolwide Dashboard ELPI Status is Very High <input type="checkbox"/> The schoolwide Dashboard ELPI Status is High; or Medium and at/above statewide percentage <input type="checkbox"/> The schoolwide Dashboard ELPI Status is Medium and below statewide percentage; or Low <input type="checkbox"/> The schoolwide Dashboard ELPI Status is Very Low <input type="checkbox"/> Not Available - No Status assigned for the ELPI on the Dashboard	<input checked="" type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)

A4: DASHBOARD SCHOOLWIDE COLLEGE/CAREER INDICATOR (CCI) - (GRADES 9-12) - QUALITY INDICATOR #4

The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:

- California School Dashboard Schoolwide CCI data (CDE)

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> Not Available - No Status assigned for the CCI on the 2022 Dashboard <input checked="" type="checkbox"/> Not Applicable - CCI is not applicable for the grade levels assigned at the charter school	<input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)

**A5: DASHBOARD SCHOOLWIDE CHRONIC ABSENTEEISM INDICATOR - (GRADES K-8) - QUALITY INDICATOR #5**

The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:

- California School Dashboard Schoolwide Chronic Absenteeism Indicator data (CDE)

Rubric		Sources of Evidence
Performance	<ul style="list-style-type: none"><input type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator Status is Very Low<input type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator Status is Low; or Medium and at/below statewide percentage<input type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator Status is Medium and above statewide percentage; or High<input checked="" type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator Status is Very High<input type="checkbox"/> Not Available - No Status assigned for the Chronic Absenteeism Indicator on the Dashboard<input type="checkbox"/> Not Applicable - The Chronic Absenteeism Indicator is not applicable for the grade levels assigned at the charter school	<ul style="list-style-type: none"><input checked="" type="checkbox"/> California School Dashboard Report (CDE)<input checked="" type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1)<input type="checkbox"/> Other: (Specify)

A6: DASHBOARD SCHOOLWIDE SUSPENSION RATE INDICATOR - QUALITY INDICATOR #6

The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:

- California School Dashboard Schoolwide Suspension Rate Indicator data (CDE)

Rubric		Sources of Evidence
Performance	<ul style="list-style-type: none"><input checked="" type="checkbox"/> The schoolwide Dashboard Suspension Rate Indicator Status is Very Low<input type="checkbox"/> The schoolwide Dashboard Suspension Rate Indicator Status is Low; or Medium and at/below statewide percentage<input type="checkbox"/> The schoolwide Dashboard Suspension Rate Indicator Status is Medium and above statewide percentage; or High<input type="checkbox"/> The schoolwide Dashboard Suspension Rate Indicator Status is Very High<input type="checkbox"/> Not Available - No Status assigned for the Suspension Rate Indicator on the Dashboard	<ul style="list-style-type: none"><input checked="" type="checkbox"/> California School Dashboard Report (CDE)<input checked="" type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1)<input type="checkbox"/> Other: (Specify)

**A7: DASHBOARD SCHOOLWIDE GRADUATION RATE INDICATOR - (GRADES 9-12) - QUALITY INDICATOR #7**

The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:

- California School Dashboard Schoolwide Graduation Rate Indicator data (CDE)

Rubric		Sources of Evidence
Performance	<ul style="list-style-type: none"><input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator Status is Very High<input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator Status is High; or Medium and at/above statewide percentage<input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator Status is Medium and below statewide percentage; or Low<input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator Status is Very Low<input type="checkbox"/> Not Available - No Status assigned for the Graduation Rate Indicator on the Dashboard<input checked="" type="checkbox"/> Not Applicable - The Graduation Rate Indicator is not applicable for the grade levels assigned at the charter school	<ul style="list-style-type: none"><input checked="" type="checkbox"/> California School Dashboard Report (CDE)<input checked="" type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1)<input checked="" type="checkbox"/> Parent-Student Handbook or other documentation of school's graduation requirements (B2.5)<input type="checkbox"/> Other: (Specify)

A8: DASHBOARD STUDENT GROUP ELA - QUALITY INDICATOR #8

The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:

- Performance of all numerically significant student groups (30 or more students) on the California School Dashboard ELA (Students with Disabilities, English Learners, Socioeconomically Disadvantaged, etc.)(CDE)

Rubric		Sources of Evidence
Performance	<ul style="list-style-type: none"><input checked="" type="checkbox"/> All numerically significant student groups have "Status/Distance From Standard (DFS)" scores above the statewide DFS<input type="checkbox"/> The majority of numerically significant student groups have "Status/DFS" scores above the statewide DFS<input type="checkbox"/> Less than a majority of the numerically significant student groups have "Status/DFS" scores above the statewide DFS<input type="checkbox"/> None of the school's numerically significant student groups have "Status/DFS" scores above the statewide DFS<input type="checkbox"/> Not Available - No assessment of performance for this indicator	<ul style="list-style-type: none"><input checked="" type="checkbox"/> California School Dashboard Report (CDE)<input checked="" type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1)<input type="checkbox"/> Other: (Specify)

**A9: DASHBOARD STUDENT GROUP MATH - QUALITY INDICATOR #9**

The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:

- Performance of all numerically significant student groups (30 or more students) on the California School Dashboard Math (Students with Disabilities, English Learners, Socioeconomically Disadvantaged, etc.)(CDE)

Rubric		Sources of Evidence
Performance	<ul style="list-style-type: none"><input checked="" type="checkbox"/> All numerically significant student groups have “Status/DFS” scores above the statewide DFS<input type="checkbox"/> The majority of numerically significant student groups have “Status/DFS” scores above the statewide DFS<input type="checkbox"/> Less than a majority of the numerically significant student groups have “Status/DFS” scores above the statewide DFS<input type="checkbox"/> None of the school’s numerically significant student groups have “Status/DFS” scores above the statewide DFS<input type="checkbox"/> Not Available - No assessment of performance for this indicator	<ul style="list-style-type: none"><input checked="" type="checkbox"/> California School Dashboard Report (CDE)<input checked="" type="checkbox"/> LAUSD Office of Data & Accountability’s Data Set (B2.1)<input type="checkbox"/> Other: (Specify)

A10: DASHBOARD STUDENT GROUP COLLEGE/CAREER INDICATOR (CCI) - (GRADES 9-12) - QUALITY INDICATOR #10

The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:

- Performance of all numerically significant student groups (30 or more students) on the California School Dashboard CCI (Students with Disabilities, English Learners, and Socioeconomically Disadvantaged, etc.)(CDE)

Rubric		Sources of Evidence
Performance	<ul style="list-style-type: none"><input type="checkbox"/> Not Available - No Status assigned for the CCI on the 2022 Dashboard<input checked="" type="checkbox"/> Not Applicable - CCI is not applicable for the grade levels assigned at the charter school	<ul style="list-style-type: none"><input type="checkbox"/> California School Dashboard Report (CDE)<input type="checkbox"/> Office of Data & Accountability’s Data Set (B2.1)<input type="checkbox"/> Other: (Specify)

**A11: ENGLISH LEARNER RECLASSIFICATION - QUALITY INDICATOR #11**

The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:

- English Learner reclassification rate for 2021-2022 (CDE)

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The school reclassified English Learners at a rate higher than the state average	<input type="checkbox"/> Reclassification report (CDE)
	<input type="checkbox"/> The school reclassified English Learners at a rate similar to the state average	<input type="checkbox"/> Office of Data & Accountability's Data Set (B2.1)
	<input type="checkbox"/> The school reclassified English Learners at a rate lower than the state average	<input type="checkbox"/> Summative ELPAC report (CDE) (B2.3)
	<input type="checkbox"/> The school did not reclassify any of its English Learners	<input type="checkbox"/> Master Plan for English Learners adopted by school's Governing Board (B3.2i)
	<input type="checkbox"/> Not Applicable - The school did not have any English Learners	
	<input checked="" type="checkbox"/> No Reclassification data for the 2021-2022 school year published by the state at the time of the issuance of this report. Please see "Notes" section above.	

A12: INTERNAL ASSESSMENT – VERIFIED DATA IMPLEMENTATION – QUALITY INDICATOR #12

The information provided in this report on internal assessments is to determine the charter school's verified data implementation, as applicable. As part of renewal (once and as applicable) for charter schools that are identified by the California Department of Education (CDE) as Middle or Low Performing, the LAUSD Board shall consider schoolwide performance and performance of all student groups on the California School Dashboard and shall also consider clear and convincing evidence, demonstrated by verified data, showing either a) the school achieved measurable increases in academic achievement, as defined by at least one year's progress for each in school or b) strong postsecondary outcomes equal to similar peers.

The LAUSD Board shall only consider verified data adopted by the State Board of Education pursuant to Education Code section 47607.2(c) (Approved List). In addition, staff's review of the charter school's submitted materials will be based on the verified data sources and related information adopted by the State Board of Education (Ed. Code, § 47607.2(c)(3).) Charter schools submitting verified data for this purpose must adhere to the state-approved criteria.

The information below is based on charter school's self-reported data and will not be scored.

Academic Progress Indicator(s) for the 2021-2022 School Year:

Academic Progress Indicator: CAASPP (ELA)	Grade Levels: 3-4	Assessment Administration: Fall/Spring	95% Participation Met*: <input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met
Academic Progress Indicator: CAASPP (Math)	Grade Levels: 3-4	Assessment Administration: Fall/Spring	95% Participation Met*: <input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met
Academic Progress Indicator: MAP by NWEA ELA	Grade Levels: TK-4	Assessment Administration: Beginning Year/End of Year	95% Participation Met*: <input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met
Academic Progress Indicator: MAP by NWEA Math	Grade Levels: TK-4	Assessment Administration: Beginning Year/End of Year	95% Participation Met*: <input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met



*If the charter school did not meet the 95% participation, the charter school's plan to address the participation is included in the Notes below. **N/A**

1. ☒ The charter school disaggregated student performance data for the following student groups: English Learner, Hispanic or Latino, Economically Disadvantage.
☐ The charter school did not disaggregate student performance data by student groups.
2. The charter school **affirmed** that the assessments were administrated as intended, consistent with the test publishers' administration and test security procedures.
3. ☒ The charter school **provided** the test publisher's definition of one year's progress, per publisher's source document.

Postsecondary Outcomes (high school only): N/A

1. The charter school uses the Choose an item. data source and Choose an item. the results of at least 95% of eligible students. If the charter school did not meet the 95% participation, the charter school's plan to address the participation is included in the Notes below.
2. The charter school Choose an item. the number of eligible students and missing or non-participating students.
3. The charter school Choose an item. evidence of comparing the data to similar peers (which may include, but not limited to, similar demographics, pupil student groups, first-time college attendance, or other similar circumstances and if not available, comparison to statewide data).

Notes:

None

Progress on LAUSD Board of Education Benchmarks and/or MOU related to STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE (if applicable):

N/A

**LOCAL CONTROL ACCOUNTABILITY PLAN 2022-2023 (For Informational Purposes Only)***The CSD reviewed the Local Control Accountability Plan.*

All requested template information and descriptions were provided:		Sources of Evidence
<input checked="" type="checkbox"/> LCFF Budget Overview for Parents <input checked="" type="checkbox"/> Supplement to the Annual Update to the 2021-2022 LCAP <input checked="" type="checkbox"/> 2022-2023 Plan Summary <input checked="" type="checkbox"/> Engaging Educational Partners <input checked="" type="checkbox"/> Goals and Actions <input checked="" type="checkbox"/> Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students <input checked="" type="checkbox"/> Action Tables		<input checked="" type="checkbox"/> Local Control Accountability Plan (B2.7) <input checked="" type="checkbox"/> Board Agenda and Minutes (B2.7)

Notes:



ORGANIZATIONAL MANAGEMENT, PROGRAMS, AND OPERATIONS	RATING*
Summary of School Performance	4, Accomplished
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p>O2: HEALTH AND SAFETY TRAINING AND PREPARATION The school has a well-developed system in place to ensure required health and safety training for the protection of students and staff is completed and in compliance with applicable legal and charter school requirements related to health and safety.</p> <ul style="list-style-type: none">Per the school's Binder review and school visit, the following evidence was provided: Emergency drills and training – Per Emergency Drill log, the School holds emergency drills 1-2 times per month. <u>At the time of the Oversight visit</u>, the school had scheduled and/or conducted the following twenty eight (28) emergency drills; (12) fire drills, four (8) earthquake and two (4) lock down/shelter in place, (4) Lockdown/Active shooter drill. The school demonstrated evidence of schools' provision and location of onsite emergency supplies. All staff completed the following training within the required timelines: Child abuse mandated reporter training documentation, Bloodborne pathogens training documentation, Pupil Suicide Prevention and Awareness Training, and Epi-pen and CPR-AED training. <p>O5: SPECIAL EDUCATION - The school has a well-developed system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements.</p> <ul style="list-style-type: none">Evidence provided included but not limited to: A review of Welligent 200 and 300 reports on the day of the visit demonstrated that the school holds IEP team meetings within required timelines provides supports and services in accordance with students' IEPs. Interventions and supports for students with Disabilities. Professional Development documentation include but not limited to; Supports for All Learners, Special Education Law, Least Restrictive Environments, Intervention, Data Review, and facilitation of IEP meetings. <p>O6: SCHOOL CLIMATE AND STUDENT DISCIPLINE The school has a well-developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights</p> <ul style="list-style-type: none">The school has a well-developed school climate and student discipline system in place as evident per school's responses to CSD inquiries in Binder 3. The following examples are some of the evidences that are included in the shared school's binder; Tiered behavior intervention, alternatives to suspension, schoolwide positive behavior support, data monitoring, and Social Emotional Learning. Puente Charter provides positive opportunities for student wellness, growth and success. Puente Charter's focus is on making the school a safe, welcoming, supportive and inclusive environment by providing students with positive behavior supports, use of restorative justice circles, by using conflict resolution practices and building positive student-teacher relationships. <p>O7: PROFESSIONAL DEVELOPMENT The school has a well-developed professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter.</p>	



- Based on a review of documentation provided by Charter in Binder 3 of Oversight documents, the following are a sampling of Professional Development provided current school year: Social Emotional Learning (SEL), School-Wide Behavior Management, Data Monitoring, Tiered Interventions, Special Education and behavior strategies, Amplify Science, Writing, ELA, Math, and Student led conferences.

O9: TRANSPARENCY FOR STAKEHOLDERS

The school has a well-developed communication system to share information with stakeholders, which is easily accessible via its documents available manually, electronically and on its website.

- Based on a review of documentation provided by the school in Binder 3 and on the school's website, the following are a sampling of what is available: Title IX information in accordance SB1375, AB 2246 Suicide Prevention posting and evidence of AB 34 implementation that specified information on bullying and harassment prevention is readily accessible in a prominent location on the school Website. UCP Procedure and Forms, and Access to approved Charter.

Areas Noted for Further Growth and/or Improvement

None

Corrective Action Required

None that require immediate action to remedy concerns indicated in this report.

Notes:

None

***NOTE:**

- A charter school cannot receive a rating in this category greater than 1 for any of the following reasons: (1) Failed to complete criminal background clearances for any new staff and/or sole proprietor (as defined on the Certification of Clearances, Credentialing, and Mandated Reporter Training 2022-2023) prior to employment; and/or failed to obtain DOJ clearance certification, as appropriate, from a vendor; and/or (2) Failed to have Health, Safety, and Emergency Plan in place.*
- A charter school cannot receive a rating in this category greater than 2 for any of the following reasons: (1) Failed to conduct child abuse mandated reporter training in accordance with Education Code 44691; or (2) Any teacher of the core instructional program is not appropriately credentialed and assigned per legal requirements and the school's current approved charter.*
- A charter school may receive a rating of 1 in this category if the school is in breach of the operative charter, including Federal, State, and District Required Language related to this section.*

**O1: SCHOOL HEALTH AND SAFETY PLANS AND PROCEDURES - QUALITY INDICATOR #1***The school has implemented school health and safety plans and procedures that ensure:*

- A current site-specific Certificate(s) of Occupancy or equivalent that authorizes the current use of the site
- A current, comprehensive, site-specific comprehensive Health, Safety, and Emergency School Safety Plan per requirements of Ed. Code, §§ 47605(c)(5)(F), 32282(a)(2)(A)-(J), and 35179.4, as applicable.
(Note: For schools co-located with a District school, the charter school participates in and complies with the District school's Integrated Safe School Plan)
- Posting of the school's Visitor Policy in a visible location in or outside the school's main office and in the Parent-Student Handbook
- Monitoring and documentation of compliance with student immunization requirements
- Completion and documentation of health screenings (e.g., vision, hearing, and scoliosis) per current applicable law and terms of the charter
- A Board adopted Pupil Suicide Prevention Policy (grades 1-6 and/or grades 7-12, as applicable), requirements of Ed. Code § 215
- Provision of at least one nutritionally adequate free or reduced priced meal each school day for all needy students, per Ed. Code § 47613.5
- For schools serving grades 7-12, inclusion of the phone number for the National Suicide Prevention Lifeline on at least one side of Student ID cards, as outlined in Ed. Code § 215.5

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The school has a well-developed system in place to ensure the protection of student and staff health and safety in compliance with applicable legal and charter requirements related to health and safety	<input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10a)
	<input checked="" type="checkbox"/> The school has a system in place to ensure protection of student and staff health and safety in compliance with applicable legal and charter requirements related to health and safety	<input checked="" type="checkbox"/> Visitor's Policy (B3.1a)
	<input type="checkbox"/> The school has a partially developed system in place to ensure protection of student and staff health and safety in compliance with applicable legal and charter requirements related to health and safety	<input checked="" type="checkbox"/> Certificate(s) of Occupancy or equivalent (B3.1b)
	<input type="checkbox"/> The school has a minimal or no system in place to ensure protection of student and staff health and safety in compliance with applicable legal and charter requirements related to health and safety	<input checked="" type="checkbox"/> Student immunization (B3.1h)
		<input checked="" type="checkbox"/> Health screening (B3.1h)
		<input checked="" type="checkbox"/> Comprehensive Health, Safety, and Emergency Plan (B3.1c)
		<input checked="" type="checkbox"/> Evacuation route maps (B3.1c)
		<input type="checkbox"/> Student ID card printed with the National Suicide Prevention Lifeline phone number (B3.1k)
		<input checked="" type="checkbox"/> Board adopted policy on pupil suicide prevention (grades K-6) (B3.1f)
		<input type="checkbox"/> Board adopted policy on pupil suicide prevention (grades 7-12) (B3.1f)
		<input checked="" type="checkbox"/> Site/classroom observation
		<input checked="" type="checkbox"/> Discussion with school leadership
		<input type="checkbox"/> Other: (Specify)

**O2: HEALTH AND SAFETY TRAINING AND PREPARATION – QUALITY INDICATOR #2*****The school has a system in place to ensure:***

- The school is able and prepared to implement its emergency procedures in the event of a natural disaster or other emergency (includes threat assessment protocol). School staff and other mandated reporters working on behalf of the school receive timely training on child abuse awareness and reporting, as outlined in Ed. Code, § 44691 .
- Maintenance of an emergency epinephrine auto-injector (“epi-pen”) onsite and training has been provided to volunteer staff member(s) in the storage and emergency use, per Ed. Code § 49414
- For schools offering an interscholastic athletic program, at least one automated external defibrillator (AED) is onsite and available for use, as outlined in Ed. Code § 35179.6
- Staff receive annual training in Pupil Suicide Prevention and Awareness (as applicable) pursuant to Ed. Code §215.
- Staff receive training in bloodborne pathogens, per 8 California Code of Regulations (“CCR”), § 5193

Rubric		Sources of Evidence
Performance	<input checked="" type="checkbox"/> The school has a well-developed system in place to ensure required health and safety training for the protection of students and staff is completed and in compliance with applicable legal and charter school requirements related to health and safety	<input checked="" type="checkbox"/> Documentation of emergency drills and training (B3.1g)
	<input type="checkbox"/> The school has a system in place to ensure required health and safety training for the protection of students and staff is completed and in compliance with applicable legal and charter school requirements related to health and safety	<input checked="" type="checkbox"/> Provision and location of onsite emergency supplies (B3.1c)
	<input type="checkbox"/> The school has a partially developed system in place to ensure required health and safety training for the protection of students and staff is completed and in compliance with applicable legal and charter school requirements related to health and safety	<input checked="" type="checkbox"/> Child abuse mandated reporter training documentation (B3.1d and B3A.5)
	<input type="checkbox"/> The school has a minimal or no system in place to ensure required health and safety training for the protection of students and staff is completed and in compliance with applicable legal and charter school requirements related to health and safety	<input checked="" type="checkbox"/> Bloodborne pathogens training documentation (B3.1e and B3A.5)
		<input checked="" type="checkbox"/> Pupil Suicide Prevention and Awareness Training (B3.1f and B3A.5)
		<input checked="" type="checkbox"/> Epi-pen and training (B3.1i)
		<input checked="" type="checkbox"/> AED (schools with an interscholastic athletic program) (B3.1j)
		<input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2022-2023 (“ESSA Grid”)</i> (B3A.1)
		<input checked="" type="checkbox"/> Discussion with school leadership
		<input type="checkbox"/> Other: (Specify)

**O3: IMPLEMENTATION OF THE EDUCATIONAL PROGRAM – QUALITY INDICATOR #3**

The school has systems in place to ensure alignment to the curricular and educational program outlined in the approved charter petition by:

- Implementing key features of the educational program described in the charter
- Implementing standards-based instruction schoolwide in accordance with the California State Content Standards specific to the grade levels served and aligned with the needs of students
- Implementing assessments to measure the development of grade-level appropriate academic and non-academic skills
- Reviewing and analyzing school and student progress towards annual goals (schoolwide and for all student groups that the school serves) that are consistent with the educational performance measured by the California School Dashboard and state assessments
- Providing teacher, staff, and administrator professional development specific to supporting desired student outcomes and key features outlined in the school's charter
- Implementing a system to monitor student progress toward and completion of graduation and A-G requirements (**high schools only**)

Rubric		Sources of Evidence
Performance	<ul style="list-style-type: none"><input checked="" type="checkbox"/> The school has fully implemented the educational program, including key features, outlined in the school's charter and aligned to California State Content Standards specific to the grade levels served. This includes full implementation of all key features, regularly reviewing and analyzing school and student progress towards annual goals and/or monitoring student progress toward completion of graduation and A-G requirements and providing ongoing professional development specific to student outcomes and key features as outlined in the charter.<input type="checkbox"/> The school has implemented the educational program, including key features, outlined in the school's charter and aligned to California State Content Standards specific to the grade levels served<input type="checkbox"/> The school has partially implemented the educational program, including key features, outlined in the school's charter and aligned to California State Content Standards specific to the grade levels served<input type="checkbox"/> The school has minimally implemented, or not at all, the educational program, including key features, outlined in the school's charter and aligned to California State Content Standards specific to the grade levels served	<ul style="list-style-type: none"><input checked="" type="checkbox"/> Implementation of an educational program serving all grade levels approved to be served per charter (B3.2i, B3.2j, B3.2k)<input checked="" type="checkbox"/> Standards-based instructional program (evidence of grade level and/or content lesson plans, unit plans) (B3.2a)<input checked="" type="checkbox"/> LCAP (B3.2b)<input type="checkbox"/> Technology readiness to administer CAASPP assessments (B3.2c) (new schools only)<input type="checkbox"/> WASC accreditation (B3.2d)<input type="checkbox"/> UC Doorways course approval documentation (B3.2e)<input checked="" type="checkbox"/> Professional development documentation (B3.3c)<input type="checkbox"/> Evidence of system for monitoring student progress toward and completion of graduation and A-G requirements (B3.2g)<input type="checkbox"/> Mathematics Placement Assessment (school serving 9th graders) (B3.2m)<input checked="" type="checkbox"/> Classroom/site observation<input type="checkbox"/> Discussion with school leadership<input type="checkbox"/> Other: (Specify)

**O4: MEETING THE NEEDS OF ALL STUDENTS; STUDENT GROUP DATA ANALYSIS - QUALITY INDICATOR #4***The school has a system in place to ensure:*

- Implementation of differentiated instructional strategies and approaches described in the charter designed to meet the learning needs of all students, including all numerically significant student groups identified in the school's LCAP and by the CDE
- Implementation of internal student assessments aligned with instructional outcomes to determine student mastery of California State Content Standards
- Disaggregation and analysis of data on a regular basis to address individual student needs and guide instructional planning and use of interventions
- Implementation, review, and modification, as appropriate, of its Master Plan for English Learners (EL identification, designated and integrated ELD standards-based instruction, progress monitoring, assessment, and reclassification)

Rubric		Sources of Evidence
Performance	<input checked="" type="checkbox"/> The school has a well-developed system and monitors the components of the charter's instructional program designed to meet the learning needs of all students, including its student groups, and modifies instruction based on data analysis	<input checked="" type="checkbox"/> Standards-based instructional program (evidence of grade level and/or content lesson plans, unit plans) (B3.2a)
	<input type="checkbox"/> The school has implemented and monitors the components of the charter's instructional program designed to meet the learning needs of all students, including its student groups, and generally modifies instruction based on data analysis	<input checked="" type="checkbox"/> LCAP (B3.2b)
	<input type="checkbox"/> The school has partially implemented the components of the charter's instructional program designed to meet the learning needs of all students, including its student groups, and partially modifies instruction based on data analysis	<input checked="" type="checkbox"/> Professional development documentation (B3.3c)
	<input type="checkbox"/> The school has minimally implemented, or not at all, the components of the charter's instructional program designed to meet the learning needs of all students, including its student groups, and does not consistently modify instruction based on data analysis	<input checked="" type="checkbox"/> Documentation of intervention and support for all students (B3.2j)
		<input checked="" type="checkbox"/> Master Plan for English Learners (B3.2i)
		<input checked="" type="checkbox"/> Documentation of implementation of the school's Master Plan for English Learners (B3.2j)
		<input checked="" type="checkbox"/> Implementation of a data analysis system (B3.2k)
		<input type="checkbox"/> Classroom/site observation
		<input type="checkbox"/> Discussion with school leadership
		<input type="checkbox"/> Other: (Specify)

**O5: SPECIAL EDUCATION - QUALITY INDICATOR #5***The school has a system in place to ensure that the school:*

- Provides special education programs and services in accordance with students' IEPs
- Provides special education training for staff
- Conducts a special education self-review annually, using the Special Education Self-Review Checklist
- Maintains timely IEP timeline records and accurate service provision records in Welligent

Rubric		Sources of Evidence
Performance	<ul style="list-style-type: none"><input checked="" type="checkbox"/> The school has a well-developed system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements<input type="checkbox"/> The school has a system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements<input type="checkbox"/> The school has a partially developed system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements<input type="checkbox"/> The school has a minimal or no system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements<input type="checkbox"/> Not Applicable - Charter school participates in LAUSD's Option 1 SELPA<input type="checkbox"/> Charter school does not participate in LAUSD's SELPA	<ul style="list-style-type: none"><input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10a)<input checked="" type="checkbox"/> District Validation Review (DVR) (B3.3a)<input type="checkbox"/> Self-Review Checklist (B3.3a)<input checked="" type="checkbox"/> Welligent reports and/or other documentation, including from the Division of Special Education (B3.3a)<input checked="" type="checkbox"/> Professional development documentation (B3.3a and B3.3c)<input checked="" type="checkbox"/> Intervention and support for students with disabilities (B3.2j)<input type="checkbox"/> Consultation with Charter Operated Programs office<input type="checkbox"/> Other special education documentation (B3.3a)<input checked="" type="checkbox"/> Classroom observation<input checked="" type="checkbox"/> Discussion with school leadership<input type="checkbox"/> Other: (Specify)

**O6: SCHOOL CLIMATE AND STUDENT DISCIPLINE - QUALITY INDICATOR #6**

The school has a school climate and schoolwide student discipline system in place to ensure that the school's practices:

- Align with principles of the District's Discipline Foundation Policy and School Climate Bill of Rights Resolution, including but not limited to, tiered behavior intervention, alternatives to suspension, and schoolwide positive behavior support, data monitoring and, includes a discipline system complaint process
- Provide positive opportunities for student wellness, growth and success, aimed at making the school safe, welcoming, supportive and inclusive
- Minimize discretionary suspensions and expulsions
- Reduce or eliminate suspension disproportionality for student groups
- Minimize chronic absenteeism for all students and student groups
- Procedures for preventing acts of bullying, including cyberbullying, in accordance with the requirements of Ed. Code, § 32283.5 and 234.4

Rubric		Sources of Evidence
Performance	<ul style="list-style-type: none"><input checked="" type="checkbox"/> The school has a well-developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights<input type="checkbox"/> The school has a school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights<input type="checkbox"/> The school has a partially developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights<input type="checkbox"/> The school has a minimally developed or no school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights	<ul style="list-style-type: none"><input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10a)<input checked="" type="checkbox"/> LCAP (B3.2b)<input checked="" type="checkbox"/> Professional development documentation (B3.3c)<input checked="" type="checkbox"/> Implementation of school climate and student discipline system that aligns with Discipline Foundation Policy and School Climate Bill of Rights principles (B3.3b)<input checked="" type="checkbox"/> Implementation of tiered behavior intervention (e.g. SSPT) (B3.3b)<input checked="" type="checkbox"/> Implementation of alternatives to suspension (B3.3b)<input checked="" type="checkbox"/> Implementation of schoolwide positive behavior support system (B3.3b)<input checked="" type="checkbox"/> Implementation of procedures for preventing acts of bullying, including cyberbullying (B3.3b)<input checked="" type="checkbox"/> Data monitoring (B3.3b)<input checked="" type="checkbox"/> LAUSD Office of Data & Accountability's Data Sets for suspension, expulsion, disproportionality, and chronic absenteeism (B2.1)<input checked="" type="checkbox"/> Classroom/site observation<input checked="" type="checkbox"/> Discussion with school leadership<input type="checkbox"/> Stakeholder focus group<input type="checkbox"/> Other: (Specify)

**O7: PROFESSIONAL DEVELOPMENT - QUALITY INDICATOR #7*****The school:***

- Has a schoolwide professional development plan for teachers and other staff that supports the educational program set forth in the charter and targets identified needs
- Provides faculty and other instructional staff with professional development opportunities to improve instructional practice
- Provides opportunities for teachers to collaborate regularly for the purpose of planning and improving curriculum and instruction

Rubric		Sources of Evidence
Performance	<ul style="list-style-type: none"><input checked="" type="checkbox"/> The school has a well-developed professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter<input type="checkbox"/> The school has implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter<input type="checkbox"/> The school has partially implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter<input type="checkbox"/> The school has not implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter	<ul style="list-style-type: none"><input checked="" type="checkbox"/> LCAP (B3.2b)<input checked="" type="checkbox"/> Professional development documentation (e.g. professional development year-long plan agendas, and sign-ins) (B3.3c)<input checked="" type="checkbox"/> Professional development training materials (B3.3c)<input checked="" type="checkbox"/> System to assess professional development needs (B3.3c)<input type="checkbox"/> Classroom/site observation<input type="checkbox"/> Discussion with school leadership<input type="checkbox"/> Stakeholder focus group<input type="checkbox"/> Other: (Specify)

**O8: STAKEHOLDER ENGAGEMENT AND INVOLVEMENT - QUALITY INDICATOR #8**

The school has a system for stakeholder engagement, including gathering input, facilitating, and encouraging involvement, sharing information, and resolving concerns, which:

- Provides parents, teachers, and students with meaningful opportunities for involvement and engagement that meet the requirements and goals of applicable federal and state law, the school's charter, and the school LCAP
- Implements a School Site Council (SSC) and/or English Learner Advisory Committee (ELAC) in accordance with legal requirements (e.g., member composition of committee/council, legally required topics, etc.), if applicable
- The liaison for students experiencing homelessness has identified this population through outreach and coordination activities with other organizations, and provided related referral of services to families, children, and youth experiencing homelessness.

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The school has a well-developed system for stakeholder engagement, including gathering input, encouraging involvement, sharing information, and resolving concerns	<input checked="" type="checkbox"/> Parent-Student Handbook (B1.10a)
	<input checked="" type="checkbox"/> The school has a system for stakeholder engagement, including gathering input, encouraging involvement, sharing information, and resolving concerns	<input checked="" type="checkbox"/> LCAP (B3.2b)
	<input type="checkbox"/> The school has a partially developed system for stakeholder engagement, including gathering input, encouraging involvement, sharing information, and resolving concerns	<input checked="" type="checkbox"/> Documentation of SSC and ELAC meetings (e.g., calendars, agendas, minutes, roster, and sign-in) (B3.3d)
	<input type="checkbox"/> The school has a minimal or no system for stakeholder engagement, including gathering input, encouraging involvement, sharing information, and resolving concerns	<input checked="" type="checkbox"/> Stakeholder consultation (B3.3d)
		<input checked="" type="checkbox"/> Parent/stakeholder involvement and engagement (B3.3d)
		<input checked="" type="checkbox"/> Foster youth/students experiencing homelessness liaison (B3.3d)
		<input checked="" type="checkbox"/> School website (B3.3e)
		<input checked="" type="checkbox"/> Discussion with school leadership
		<input type="checkbox"/> Stakeholder focus group
		<input type="checkbox"/> Other: (Specify)

**O9: TRANSPARENCY FOR STAKEHOLDERS- QUALITY INDICATOR #9**

The school has a system in place to ensure that it operates in a transparent manner and keeps stakeholders informed, including:

- Information is easily accessible to the public and school stakeholders, including but not limited to applicable categories described in Charter School Transparency Resolution
- UCP and all complaint procedures
- Title IX information is available in applicable languages as required by law
- Per Ed. Code § 234.6 and District policy, specified information relating to suicide, bullying, discrimination and harassment prevention, among other things, are readily accessible in a prominent location on the school website in a manner that is easily accessible to parents/guardians and students
- Provides all stakeholders with appropriate, accessible, and relevant information about individual student and schoolwide academic progress and performance
- Notification requirements to pupils and parents or guardians of pupils on how to initiate access to available pupil mental health services on campus, in the community, or both no less than twice during the school year, in accordance with Ed. Code, § 49428
- Identifies and implements the most appropriate methods of informing parents and guardians of pupils in grades 6-12 of human trafficking prevention resources, in accordance with Ed. Code, § 49381
- Informs parents of high school students about transferability of courses to other public high schools and the eligibility of courses to meet college entrance requirements, in accordance with Ed. Code, § 47605 (**high schools only**)

Rubric**Sources of Evidence**



Performance

- | | |
|---|---|
| <ul style="list-style-type: none"><input checked="" type="checkbox"/> The school has a well-developed system to share information with stakeholders, that is easily accessible via its documents available both manually, electronically and on its website<input type="checkbox"/> The school has a system to share information with stakeholders via its documents available both manually, electronically and on its website<input type="checkbox"/> The school has a partially developed system to share information with stakeholders via its documents available manually/electronically or on its website<input type="checkbox"/> The school has a minimally developed system to share information with stakeholders with limited to no availability of documents manually/electronically or on its website | <ul style="list-style-type: none"><input checked="" type="checkbox"/> UCP Procedure and Forms (B1.11)<input checked="" type="checkbox"/> Complaint Procedure and Forms (B1.12)<input checked="" type="checkbox"/> Review of the following information posted to the school's website (B3.3e):<ul style="list-style-type: none"><input checked="" type="checkbox"/> LCAP, per Ed. Code § 47606.5(h)<input type="checkbox"/> Current Board agenda in compliance with Brown Act, per Gov. Code, §54954.2(a)(1)<input checked="" type="checkbox"/> Website posting required per Ed. Code § 234.6 (B3.3e):<ul style="list-style-type: none"><input checked="" type="checkbox"/> Policy on Pupil Suicide Prevention<input checked="" type="checkbox"/> Title IX information, including a link to CDE's Title IX website<input checked="" type="checkbox"/> Policies on anti-discrimination, anti-harassment, anti-intimidation, anti-bullying, and sexual harassment policies, including:<ul style="list-style-type: none"><input checked="" type="checkbox"/> Anti-cyberbullying procedures<input type="checkbox"/> Social media anti-bullying procedures<input type="checkbox"/> Link to statewide resources including community based organizations compiled by CDE<input checked="" type="checkbox"/> Sharing accessible and relevant information about individual student, student group, and schoolwide academic progress and performance with all stakeholders as appropriate (B3.3e)<input checked="" type="checkbox"/> Access to approved charter (B3.3e)<input type="checkbox"/> Compliance with the LAUSD BOE's Charter School Transparency Resolution, including (B3.3e):<ul style="list-style-type: none"><input type="checkbox"/> Financial Audit<input type="checkbox"/> Student Demographics<input type="checkbox"/> Documentation of informing parents/guardians about transferability of courses/course credit and eligibility to meet A-G requirements (high schools only) (B3.3e)<input type="checkbox"/> Informing parents/guardians of human trafficking prevention resources (grades 6-12) (B3.3e)<input checked="" type="checkbox"/> Notification of access to available mental health services (B3.3e)<input checked="" type="checkbox"/> School website (B3.3e)<input type="checkbox"/> Other: (Specify) |
|---|---|

**O10: EVALUATION OF SCHOOL STAFF - QUALITY INDICATOR #10**

The school has a system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements, including:

- Evaluation procedures with clear performance standards for all school-based staff, including but not limited to administrators, certificated staff, and classified staff
- Evaluation tool(s) for all school-based staff, including but not limited to administrators, certificated staff, and classified staff

Rubric		Sources of Evidence
Performance	<ul style="list-style-type: none"><input type="checkbox"/> The school has a well-developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements<input checked="" type="checkbox"/> The school has a system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements<input type="checkbox"/> The school has a partially developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements<input type="checkbox"/> The school has a minimal or no system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements	<ul style="list-style-type: none"><input type="checkbox"/> Evaluation procedures with clear performance standards for all school-based staff (B3.3f)<input checked="" type="checkbox"/> Evaluation tool(s) for all school-based staff (B3.3f)<input type="checkbox"/> Discussion with school leadership<input type="checkbox"/> Other: (Specify)

**O11: CLEARANCES AND CREDENTIALING COMPLIANCE - QUALITY INDICATOR #11**

The school is in compliance with applicable law and the terms of its approved charter regarding clearances and credentialing:

- All certificated staff are fully credentialed, including EL authorizations, and appropriately assigned as authorized by their credentials at all times
- Individuals who have been continuously employed in a teaching position since the 2019–20 school year obtain the appropriate certificate, permit, or other document for their certificated assignment no later than July 1, 2025 (Ed. Code § 47605.4(a).)
- The school has obtained all necessary employee clearances, including criminal background and tuberculosis (TB) risk assessments/clearances, prior to employment, and keeps all clearances current
- The school has obtained all necessary vendor clearances, including criminal background and tuberculosis (TB) risk assessments/clearances, prior to the provision of service, and keeps all clearances current
- The school has conducted volunteer clearances in accordance with applicable law and policy, including criminal background clearances for all volunteers who perform school site services while not under the direct supervision of a school employee, and tuberculosis (TB) risk assessments/clearances for all volunteers with frequent or prolonged contact with students

Rubric		Sources of Evidence
Performance	<input checked="" type="checkbox"/> The school has fully implemented and continually monitors systems and procedures that maintain 100% compliance with all applicable law, including but not limited to clearance, credentialing, and assignment requirements at all times	<input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2022-2023</i> form (“ESSA Grid”) (B3A.1a)
	<input type="checkbox"/> The school has implemented and monitors systems and procedures that maintain substantial compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements	<input checked="" type="checkbox"/> Human Resources (HR) policies and procedures regarding clearances and ESSA qualifications and credentialing requirements (B1.13)
	<input type="checkbox"/> The school has partially implemented and intermittently monitors systems and procedures to maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements	<input checked="" type="checkbox"/> Staff roster (B3A.1b)
	<input type="checkbox"/> The school has not implemented and/or does not monitor systems and procedures to maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements	<input checked="" type="checkbox"/> School master schedule (B3A.1c)
		<input checked="" type="checkbox"/> Custodian(s) of Records documentation (B3A.1d)
		<input checked="" type="checkbox"/> Criminal Background Clearance Certifications (B3A.2a, B3A.3, and B3A.4)
		<input checked="" type="checkbox"/> Teaching credential/authorization documentation (B3A.2b)
		<input checked="" type="checkbox"/> Vendor clearances and credentialing certifications (B3A.6)
		<input checked="" type="checkbox"/> Volunteer (TB) risk assessment/clearance certification (B3A.7)
		<input type="checkbox"/> Discussion with school leadership
		<input type="checkbox"/> Other: (Specify)

Progress on LAUSD Board of Education Benchmarks and/or MOU related to ORGANIZATIONAL MANAGEMENT (if applicable):



Annual Performance-Based Oversight Visit Report

DATE OF VISIT: **3/22/2023**

Location Code: **2621**
 School Name: **PUENTE Charter**
 FY Start Date: **2002-03**

Charter #: **2621**
 CDS Code: **1964733 6120471**

2621	2019-2020					2020-2021					2021-2022				
PUENTE Charter	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Cash and Cash Equivalents		866,725	866,725	741,774	741,774		620,638	430,735	349,848	351,345		695,155	825,725	840,234	840,234
Current Assets		757,214	757,214	1,469,760	1,456,363		1,407,285	1,405,887	1,464,790	1,479,693		1,211,808	1,151,475	1,889,785	1,702,490
Fixed and Other Assets		832,967	832,968	740,046	355,070		894,380	1,006,317	497,288	497,289		512,584	572,717	514,887	514,888
Total Assets		1,590,181	1,590,180	2,209,806	1,811,433		2,301,665	2,412,204	1,962,078	1,976,962		1,724,192	1,724,192	2,204,872	2,217,378
Deferred Outflows of Resources		0	0	0	0		0	0	0	0		0	0	0	0
Current Liabilities		0	0	559,635	210,928		142,115	132,113	255,686	270,800		0	0	466,468	479,173
Other Long Term Liabilities		0	0	0	0		0	0	0	0		0	0	0	0
Unfunded OPEB Liabilities		0	0	0	0		0	0	0	0		0	0	0	0
Total Liabilities		0	0	559,635	210,928		142,115	132,113	255,686	270,800		0	0	466,468	479,173
Deferred Inflows of Resources		0	0	0	0		0	0	0	0		0	0	0	0
Net Assets		1,590,181	1,590,180	1,650,171	1,600,505		2,159,550	2,280,091	1,706,412	1,706,182		1,724,192	1,724,192	1,738,204	1,738,205
Total Revenues	1,919,009	1,919,009	1,919,009	2,015,068	1,993,052	2,383,339	2,383,339	2,707,853	2,700,033	2,700,080	3,135,730	3,135,730	3,372,167	3,834,926	3,834,926
Total Expenditures	1,914,894	1,914,894	1,914,894	1,950,961	1,978,613	2,373,961	2,373,961	2,577,733	2,594,126	2,594,403	3,117,950	3,117,950	3,354,387	3,802,904	3,802,903
Net Income / (Loss)	4,115	4,115	4,115	64,105	14,439	9,378	9,378	129,920	105,907	105,677	17,780	17,780	17,780	32,022	32,023
Operating Transfers In (Out) and Sources / Uses	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Extraordinary Item - Transfer of Net Assets	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Inc / (Dec) in Net Assets	4,115	4,115	4,115	64,105	14,439	9,378	9,378	129,920	105,907	105,677	17,780	17,780	17,780	32,022	32,023
Net Assets, Beginning	1,544,297	1,586,066	1,586,065	1,586,066	1,586,066	1,590,180	1,650,172	1,650,171	1,650,172	1,600,505	1,730,427	1,706,412	1,706,412	1,706,412	1,706,182
Adj. for restatement / Prior Yr Adj	0	0	0	0	0	500,000	500,000	500,000	(49,667)	0	0	0	0	(230)	0
Net Assets, Beginning, Adjusted	1,544,297	1,586,066	1,586,065	1,586,066	1,586,066	2,090,180	2,150,172	2,150,171	1,600,505	1,600,505	1,730,427	1,706,412	1,706,412	1,706,182	1,706,182
Net Assets, End	1,548,412	1,590,181	1,590,180	1,650,171	1,600,505	2,099,558	2,159,550	2,280,091	1,706,412	1,706,182	1,748,207	1,724,192	1,724,192	1,738,204	1,738,205
Unrestricted Net Assets		1,590,181	1,590,180	1,650,171	1,100,415		2,159,550	2,280,091	1,706,412	1,206,046		1,724,192	1,724,192	1,738,204	1,238,089
Restricted Net Assets		0	0	0	500,090		0	0	0	500,136		0	0	0	500,136

2621	Audited Financials					2022-2023				
PUENTE Charter	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Cash and Cash Equivalents	897,012	741,774	351,345	840,234	0		812,747	812,747	0	0
Current Assets	1,500,655	1,456,363	1,479,693	1,702,490	0		1,338,497	1,338,497	0	0
Fixed and Other Assets	212,908	355,070	497,289	514,888	0		580,345	580,345	0	0
Total Assets	1,713,563	1,811,433	1,978,613	2,217,378	0		1,918,842	1,918,842	0	0
Deferred Outflows of Resources	0	0	0	0	0		0	0	0	0
Current Liabilities	127,497	210,928	270,800	479,173	0		0	0	0	0
Other Long Term Liabilities	0	0	0	0	0		0	0	0	0
Unfunded OPEB Liabilities	0	0	0	0	0		0	0	0	0
Total Liabilities	127,497	210,928	270,800	479,173	0		0	0	0	0
Deferred Inflows of Resources	0	0	0	0	0		0	0	0	0
Net Assets	1,586,066	1,600,505	1,706,182	1,738,205	0		1,918,842	1,918,842	0	0
Total Revenues	2,224,465	1,993,052	2,700,080	3,834,926	0	5,044,741	5,044,741	5,044,741	0	0
Total Expenditures	1,379,183	1,978,613	2,584,403	3,802,903	0	4,864,103	4,864,103	4,864,103	0	0
Net Income / (Loss)	845,282	14,439	105,677	32,023	0	180,638	180,638	180,638	0	0
Operating Transfers In (Out) and Sources / Uses	0	0	0	0	0	0	0	0	0	0
Extraordinary Item - Transfer of Net Assets	0	0	0	0	0	0	0	0	0	0
Inc / (Dec) in Net Assets	845,282	14,439	105,677	32,023	0	180,638	180,638	180,638	0	0
Net Assets, Beginning	740,784	1,586,066	1,600,505	1,706,182	0	1,724,192	1,738,204	1,738,204	0	0
Adj. for restatement / Prior Yr Adj	0	0	0	0	0	0	0	0	0	0
Net Assets, Beginning, Adjusted	740,784	1,586,066	1,600,505	1,706,182	0	1,724,192	1,738,204	1,738,204	0	0
Net Assets, End	1,586,066	1,600,505	1,706,182	1,738,205	0	1,904,830	1,918,842	1,918,842	0	0
Unrestricted Net Assets	957,348	1,100,415	1,206,046	1,238,089	0		1,918,842	1,918,842	0	0
Restricted Net Assets	628,718	500,090	500,136	500,136	0		0	0	0	0

**FISCAL OPERATIONS**

You have been assessed by the Fiscal Oversight team and you are receiving the rating of **3, Proficient**

Other circumstances and information could influence the rating and are noted in this evaluation.

PUENTE Charter's fiscal condition is positive and has been upward trending since the 2018-2019 fiscal year. According to the 2021-2022 independent audit report, the school had positive net assets of \$1,738,205 and net income of \$32,023. The 2022-2023 Second Interim projected positive net assets of \$1,918,843 and net income of \$180,638.

Financial Highlights

	FINANCIAL HIGHLIGHTS				
	2018-2019 (Audited Actuals)	2019-2020 (Audited Actuals)	2020-2021 (Audited Actuals)	2021-2022 (Audited Actuals)	2022-2023 (Second Interim)
PUENTE Charter					
Net Assets	\$1,586,066	\$1,600,505	\$1,706,182	\$1,738,205	\$1,918,843
Net Income / (Loss)	\$845,282	\$14,439	\$105,677	\$32,023	\$180,638
Transfers In / Out	\$0	\$0	\$0	\$0	\$0
Prior Year Adjustment(s)	\$0	\$0	\$0	\$0	\$0
Cash and Cash Equivalents	\$897,012	\$741,774	\$351,345	\$840,234	\$812,747
Unrestricted Net Assets	\$957,348	\$1,100,415	\$1,206,046	\$1,238,069	\$1,918,843
Norm Enrollment Reported by the School	112	152	195	240	300
	FINANCIAL RATIO ANALYSIS				
Cash Reserve Level (Cash Balance/Total Expenditures) <i>5% and greater is recommended</i>	65.04%	37.49%	13.54%	22.09%	16.71%



Fund Reserve (Reserve for Economic Uncertainty) (Unrestricted Net Assets /Total Expenditures) <i>3% - 5% and greater is recommended (depending on the school's ADA)</i>	69.41%	55.62%	46.49%	32.56%	39.45%
Current Ratio (Working Capital Ratio) (Current Assets/Current Liabilities) <i>At least 1.2 or 120% is recommended</i>	1177.01%	690.46%	546.42%	355.30%	Undefined*
Debt Ratio (Total Liabilities/Total Assets) <i>Lower than 1.0 or 100% is recommended</i>	7.44%	11.64%	13.70%	21.61%	0.00%*

*The values for Current Ratio and Debt Ratio are a result of no liabilities projected for Fiscal Year 2022-2023 Second Interim. Per the school, there were no liabilities projected due to the following reasons: 1) Liabilities are mostly Deferred Revenue from Stimulus funding, and stimulus deferrals are not reflected in interim reporting; and 2) PUENTE Charter doesn't directly pay invoices, and therefore, outstanding payables are not reflected in the charter school's interim reporting. The school utilizes one operational account for PUENTE Charter and PUENTE Learning Center. Expenditures are coded to the specific school/segment for which they were incurred.

Areas of Demonstrated Strength and/or Progress:

1. The school's fiscal condition is positive. Please refer to the Financial Highlights table above.

Areas Noted for Further Growth and/or Improvement:**1. Outstanding Checks (Recurring Issue):**

Based on the CSD's review and analysis of a sample of the school's Bank Reconciliation Reports for the period spanning from July to December 2022, the CSD noted 10 checks drawn on the PUENTE Learning Center's operating account (Wells Fargo Bank Checking Account Ending in X0438) that, as of December 2022, had been outstanding for over 180 days. This is a recurring issue cited in the school's 2021-2022 Annual Performance-Based Oversight Report. Details regarding these checks are summarized below.

Item #	Check Number	Date	Payee	Check Amount	Number of Days Outstanding (As of 12/31/2022)
1	18926	8/21/2019	C. L.	\$100.00	1228
2	18928	8/21/2019	C. B.	\$100.00	1228
3	18949	8/21/2019	L. P.	\$100.00	1228



4	18989	8/29/2019	Department of Justice: Social Service Community	\$90.00	1220
5	19382	3/11/2020	Department of Justice Registry of Charitable Trust	\$20.00	1025
6	20308	12/16/2021	J. C.	\$250.00	380
7	20319	12/16/2021	M. B. J.	\$250.00	380
8	20321	12/16/2021	N. G.	\$250.00	380
9	20654	6/9/2022	L. A.	\$350.00	205
10	20709	6/23/2022	J. A. M.	\$1,000.00	191

As noted in the school's 2021-2022 Annual Performance-Based Oversight Report, PUENTE Learning Center pays the bills for the charter school from the Learning Center's Operating Account. Expenditures related to the charter school are coded and accounted separately by the Learning Center. PUENTE Charter School's Fiscal Policies states: "The Staff Accountant will investigate any checks that are outstanding over six months (pg. 13)." PUENTE Learning Center's California Escheat and Unclaimed Property Law Compliance policy (page 44 from PUENTE Learning Center's Policies and Procedures Manual) states: "The Finance department must prepare a journal entry to reclassify the escheatable portion of stale-dated check liability to the proper account in the general ledger. Finance will determine outstanding checks that are six months or older by review of the Bank Reconciliation module which is updated monthly for all cleared checks."

The CSD shared its observations regarding the above outstanding checks with the school. The school responded that due to the recruitment process and onboarding for the finance position of staff accountant, school's management didn't have enough support to assist with the timely reaching out and following-up with the payees regarding outstanding checks. The school shared that a new staff accountant was hired in November 2022 and began researching into the list of outstanding checks exceeding 180 days. The school stated that any items that should have been voided previously would be voided and cleared off from the school's records in Fiscal Year 2022-2023. The school stated that steps have been set in motion under the guidelines of the State of California Controller's Office for Unclaimed Property Division, and that Letters of Due Diligence were mailed out to the payees of said checks on January 24, 2023. The school stated four payees responded, stop payments were placed on old checks, and replacement checks were issued and cashed by these payees. The school further stated they would continue to attempt to contact the payees until the deadline to submit the Remit Report to the Unclaimed Property Division on June 1, 2023.

The CSD recommends that the school strictly adhere to its governing board-approved fiscal policies and procedures regarding the research, investigation, write-off, and reissuance of checks that have been outstanding for the specified periods of time, and maintain documentation of such, consistent with industry best practices.

The governing board and leadership team of the charter school are responsible for managing the operations of the school. The CSD recommends that the Annual Performance-Based Oversight Visit Report, including the above-noted fiscal findings and observations, be discussed at the school's next governing board meeting, highly preferably no later than 90 days following the school's receipt of this report, so that the charter school and its governing board may address any issues early enough to implement changes in order to see results in its next fiscal year. It is the school's responsibility to provide the CSD its action plans/steps, proof of implementation of the mitigating actions taken by the school, and/or documentation (e.g., governing board meeting agendas and approved board meeting



minutes, etc.), as applicable, prior to or during the next Annual Performance-Based Oversight Visit. The CSD will continue to monitor these issues through oversight.

Other Observations (Items described in this section, which may not have been addressed in the charter school's Fiscal Policies and Procedures, are recommended for improvement to align with optimal business practices)

1. Bank Reconciliation Reports Not Prepared and/or Reviewed/Approved Timely:

Based on the CSD's review of the bank reconciliation reports for the six-month period spanning from July 2022 to December 2022, the CSD noted that the bank reconciliation reports lacked evidence of timely preparation, review, or approvals for monthly bank statement ending dates summarized below.

Account Number	Monthly Bank Statement Ending Date	Reconciliation Report Preparation and Approval Deadline (per School's Fiscal Policies)	Actual Reconciliation Report Preparation Date	# of Days Reconciliation Report Late	Actual Date Reconciliation Report Approved and Signed	# of Days Reconciliation Approval Late
X0438	7/31/2022	8/31/2022	9/7/2022	7	9/7/2022	7
X0438	8/31/2022	9/30/2022	10/10/2022	10	10/10/2022	10
X0438	11/30/2022	12/31/2022	1/19/2023	19	1/19/2023	19
X0438	12/31/2022	1/31/2023	2/17/2023	17	2/17/2023	17
X2931	8/31/2022	9/30/2022	10/14/2022	14	10/14/2022	14
X2931	11/30/2022	12/31/2022	2/2/2023	33	2/2/2023	33

PUENTE Charter School's Accounting Policies and Procedures Manual Internal Financial Controls states: "Bank statements will be reconciled monthly. All bank statements will be given unopened to the Vice President of Finance for review (pg. 21)." PUENTE Learning Center's Policies and Procedures Manual states: "All account reconciliations for the preceding month are to be completed by the 14th working day of the month following or as requested by the VP of Finance. At a minimum, each bank account is to be reconciled monthly along with selected balance sheet accounts with significant balances (pg. 20)."

The CSD shared its observations regarding the above bank reconciliations with the school. The school responded that for Account X0438, the overdue reconciliation approvals were due to financial software upgrade, including a testing process and trainings, which resulted in delayed reconciliations. For Account X2931, the school responded that the overdue reconciliation approvals were the result of training of the new staff accountant on the charter school revenue recognition and classification of the Standardized Account Code Structure (SACS) Resource Codes. The school stated that the school's investment in the financial software upgrade and relevant trainings is promoting a stronger alignment with school's stated Fiscal Policies and Procedures for timely Bank Reconciliation Reports' preparation, review, and approval.



The CSD recommends that the school strictly adhere to its governing board-approved fiscal policies and procedures to ensure that all of the school's Bank Reconciliation Reports are prepared accurately, reviewed, and approved in a timely manner, and include documentation of the appropriate signatures (including the printed names and titles/positions), as well as the preparation and review/approval dates, to validate the review and approval processes performed by the school.

The Charter Schools Division will continue to monitor this issue referenced above during the next oversight visit. The results may be factored into the school's rating for next year.

Corrective Action Required:

None noted that require immediate action to remedy concerns in this report.

**Notes:****I. Review of Fiscal Documentation**

1. Reviewed independent audit report for the Fiscal Year ended June 30, 2022, and noted the following:
 - a. Audit opinion: Unmodified/Unqualified.
 - b. Material weaknesses: None Reported.
 - c. Deficiencies/Findings: None Reported.
 - d. Lack of a Going Concern: None Reported.
2. The 2021-2022 audited and unaudited actuals nearly mirror each other.
3. The school's reported Norm Enrollment was 112, 152, 195, 240, and 300 students for Fiscal Years 2018-2019, 2019-2020, 2020-2021, 2021-2022, and 2022-2023 respectively, representing an accumulated increase in enrollment of 188 students since Fiscal Year 2018-2019. The school's reported Norm Enrollment for Fiscal Year 2022-2023 is 300 students, which is at its projected student enrollment for Fiscal Year 2022-2023 (i.e., 300 students) per the school's petition enrollment roll-out plan in its current charter. As noted above, the school has maintained a balanced budget for Fiscal Year 2021-2022 and projects a balanced budget for Fiscal Year 2022-2023 per its 2022-2023 Second Interim Financials. The CSD will continue to monitor the school's student enrollment through oversight.
4. A Segregation of Duties (SOD) review was conducted remotely via videoconference. No discrepancies were noted.
5. Reviewed 15 checks (and 3 electronic credit/debit transactions). No discrepancies were noted.
6. Reviewed bank statements and bank reconciliations from July 2022 through December 2022. Selected the months of October 2022, November 2022, and December 2022 for sample testing. Discrepancies were noted under Areas Noted for Further Growth and/or Improvement and Other Observations sections above.
7. Reviewed 6 credit card statements from July 2022 through December 2022. Selected the months of August 2022 through December 2022 for sample testing. No discrepancies were noted.

II. Review of 2022-2023 Fiscal Preparation Guide

1. Most current fiscal reports presented to the charter school's governing board: a) Balance Sheet; b) Income Statement (Statement of Activities), and c) Cash Flow Statement were provided.
2. Minutes of the meeting when the above fiscal reports (i.e., Items 1a., 1b., and 1c.) were presented to and approved by the charter school's governing board were provided.
3. Audit/fiscal reports issued by any public agency or third-party organizations, and the school's governing board minutes of all meetings reflecting the discussion of any of the fiscal reports and applicable audit findings resolution/corrective action were not provided as the charter school has indicated not applicable
4. Minutes of the meeting when the 2022-2023 budget was adopted were provided.
5. Evidence of the charter school is offering 403(b) Tax-Sheltered Annuity Plan and Social Security benefits to its employees, and that this is done in a manner that is consistent with the charter terms and the Charter Schools Act (Education Code 47611) was provided.
6. Minutes of the meeting reflecting the selection of the independent auditor were provided.
7. Minutes of the meeting reflecting the discussion of the most current independent audit report were provided.
8. Minutes of the meeting reflecting the receipt, review, and discussion of the most current four interim financial reports (i.e., preliminary budget, first interim and second interim financial reports, and unaudited actuals) submitted to LAUSD were provided.



9. Minutes of the meeting reflecting the discussion and resolution of complaints received from staff or vendors were not provided as the charter school has indicated not applicable.
10. Minutes of the meeting reflecting the receipt, review, and discussion of the most current Annual Performance-Based Oversight Visit report were provided.
11. A copy of the most current fiscal policies and procedures was provided.
12. Minutes of the meeting reflecting approval of the current fiscal policies and procedures and, if applicable, minutes of the meeting reflecting the approval of the current procurement policies and procedures were provided.
13. A copy of the charter school's organizational chart that depicts the current reporting structure of the charter school, including but not limited to, any board members, charter management organization (CMO) employees (when applicable), and/or school employees, who handle day-to-day finances and/or have responsibilities outlined within the charter school's fiscal policies and procedures was provided.
14. An itemized accounting regarding the total compensation paid in Fiscal Year 2021-2022 to all executives, school leaders, administrators, directors, and non-certificated staff, who may have decision-making authority over the charter school, either employed directly by the charter school or the entity managing the charter school was provided.
15. A description of the relationship (legal, business or otherwise) the charter school maintains with any related party as defined in the CSD's 2022-2023 Fiscal Preparation Guide Item 14 was not provided as the charter school has indicated not applicable.
16. Copies of any and all of the most current signed and executed agreements/contracts within the last year (i.e., 2021-2022) or since the last update, whichever is later (including attachments and exhibits that accompany the agreements/contracts) with the administrative services provider and/or the back office services provider, or the charter school's operator and/or charter school's home office (e.g., management contracts, service agreements, license agreements, affiliation agreements, etc.) were provided.
17. Minutes of the meeting reflecting approval of the management fees, licensing fees, or any other fees were not provided as the charter school has indicated not applicable.
18. A copy of the sole statutory member's by-laws, and a copy of the sole statutory member's articles of incorporation were not provided as the charter school has indicated not applicable.
19. The most current accounts payable aging report, listing the balances owed, vendor names, invoice numbers, invoice dates, number of days outstanding, and, if applicable, explanations for 90+ days outstanding invoice(s) or in accordance with the charter school's fiscal policies and procedures was provided.
20. Check registers, or a list of all check/cash disbursements (when the school's payments are outsourced to a third party provider), documenting all checks and electronic debit transactions for the prior 12 months (spanning from 10/2021 to 12/2022) were provided. No discrepancies were noted.
21. a) A list of all active credit card account(s), b) (If applicable) A list of all closed credit card account(s) within the last year, and c) All credit card statements for the most current six months (spanning from 07/2022 to 12/2022) were provided. No discrepancies were noted.
22. a) A list of all active school bank account(s), b) (If applicable) A list of all closed school bank account(s) within the last year, c) Monthly bank statements and reconciliation reports for the most current six months (spanning from 07/2022 to 12/2022), and d) (If applicable) A list of all debit cards were provided. Discrepancies were noted under Areas Noted for Further Growth and/or Improvement and Other Observations sections above.
23. Student body financial records (including ASB policies and procedures, budgets, cash flow statements and projections, bank statements with reconciliations, audit reports, and other fiscal reports, if applicable) were not provided as the charter school has indicated not applicable.
24. The most current inventory listing for both capitalized and non-capitalized equipment, in Microsoft Excel format, including equipment description/type, brand/model, tag number, acquisition date, purchasing price, book value, asset life, and location of use was provided.
25. A link to the charter school's website where the Education Protection Account (EPA) revenue and expenditures report pertaining to the prior fiscal year (i.e., 2021-2022) is posted (as required by Article XIII, Section 36, Subdivision (e), Paragraph (6) of the California Constitution) was provided.



26. Links to the charter school's website where the current (1) Audited Financial Statements, and (2) Local Control and Accountability Plan (LCAP) are posted (or the school's assertion that its Audited Financial Statements are made available to members of the public) in accordance with Education Code section 47606.5(h) and/or LAUSD's Charter School Transparency Resolution were provided.
27. Documents pertaining to the charter operator's/school's financing/borrowing activities were not provided as the charter school has indicated not applicable.
28. The charter school's plan(s) for the purchase/new lease, relocation/expansion to new school site(s), facilities-related expansions, and/or major improvements to the existing and/or new school site(s) and pertinent documents with the following information, as appropriate were provided. As noted in the school's 2021-2022 Annual Performance-Based Oversight Report, the charter school's expansion plan for the major improvements to the existing school site to accommodate its fourth and fifth grade levels was provided. The school provided its architectural and development plan, with estimated total costs of \$336,005. The CSD was advised that the first phase of the building upgrades started in October 2018, whereby the school's consultants conducted a feasibility, environmental, and traffic study, followed by the conditional permit use approval. The first phase has been completed, including the successful approval of Conditional Use Permit from the City of Los Angeles. During the 2022-2023 oversight, the school stated that the second phase of improvements is extending through Fiscal Year 2023-2024 and provided below the facility improvement project plan for the PUENTE Learning Center. Per the school, this project is an investment in the PUENTE facility to ensure a high-quality learning environment for PUENTE's spectrum of educational resources for the Boyle Heights community, which includes California State Preschool Program, Charter School, College & Career Program, and Adult School & Integrated Services:
- Estimated Project Completion Date: December 2024
 - Projected Total Cost: \$8,000,000
 - Purpose of Project/Construction: The project will upgrade PUENTE facility infrastructure including a complete higher energy-efficient translucent Kalwall wall system; technologically advanced facility components and equipment; and space allocation improvement for PUENTE's spectrum of services. The project includes leasehold improvements for the facility space allocated to PUENTE Charter.
 - Current Project Status: The upgrade work is being completed in phases that allows for operations to continue.
 - Financing Sources (description/amount): Improvements that will benefit the entire facility are financed by the PUENTE Learning Center reserves. The leasehold improvements that benefit the charter school will also come from PUENTE Learning Center reserves as well as the philanthropic support from Great Public School Now (GPSN) and The Walton Foundation, in the amounts of \$500K and \$325K, respectively.
29. Disclosure of legal issues was not provided as the charter school has indicated not applicable.

Progress on LAUSD Board of Education and/or MOU Benchmarks related to FISCAL OPERATIONS (if applicable):

N/A

**Fiscal Operations Rubrics**

Existing School – a charter school that was/is in operation/active in the preceding school year(s) and the current school year. Existing schools may receive a rating of 1, 2, 3, or 4.

New School – a charter school that is in its first year of operation in the current school year and does not have an independent audit report for its first operative year on file with the Charter Schools Division. New schools are evaluated based on current year information. New schools may receive a rating of 1 or 2.

<p><i>An existing school that, at a minimum, meets all of the Required Criteria and at least four of the Supplemental Criteria listed below would be assessed eligible to be considered as <u>Accomplished [Rating of 4].</u></i></p> <p><u>Existing Schools (based on the most current annual audit):</u></p> <p style="text-align: center;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none">1. Net assets are positive in the prior two audits;2. The cash balance at the beginning of the school year is positive;3. The two most current annual independent audits show no material weaknesses, deficiencies, and/or findings;4. If applicable, federal, state, and other public agency audits/reviews (e.g., California State Teachers' Retirement System (CalSTRS), California Public Employees' Retirement System (CalPERS), Fiscal Crisis & Management Assistance Team (FCMAT), United States Department of Education (USDE), California Department of Education (CDE), etc.), at the time of the oversight visit, show no outstanding material weaknesses, deficiencies, and/or findings;5. Vendors and staff are consistently paid in a timely manner;6. Governing board approves Fiscal Policies and Procedures, at a minimum, once prior to each charter renewal term;7. Charter school consistently adheres to the governing board-approved Fiscal Policies and Procedures;8. Governing board adopts the annual budget;9. Governing board reviews and/or discusses reports (e.g., first interim, second interim, unaudited actuals, audited financial statements, etc.) submitted to LAUSD;10. If applicable, governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD;11. There is no apparent conflict of interest;12. The Education Protection Account allocation and expenditures, audited financial statements, and the most current governing board-approved	<p><i>An existing school that, at a minimum, meets all of the Required Criteria and at least three of the Supplemental Criteria listed below would be assessed eligible to be considered as <u>Proficient [Rating of 3].</u></i></p> <p><u>Existing Schools (based on the most current annual audit):</u></p> <p style="text-align: center;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none">1. Net assets are positive in the most current audit;2. The cash balance at the beginning of the school year is positive;3. The most current annual independent audit shows no material weaknesses, deficiencies and/or findings;4. If applicable, federal, state, and other public agency audits/reviews (e.g., CalSTRS, CalPERS, FCMAT, USDE, CDE, etc.), at the time of the oversight visit, show outstanding findings, and the school is able to demonstrate evidence of remedies in addressing these findings;5. Vendors and staff are generally paid in a timely manner;6. Governing board approves Fiscal Policies and Procedures, at a minimum, once prior to each charter renewal term;7. Charter school generally adheres to the governing board-approved Fiscal Policies and Procedures;8. Governing board adopts the annual budget;9. Governing board reviews and/or discusses reports (e.g., first interim, second interim, unaudited actuals, audited financial statements, etc.) submitted to LAUSD;10. If applicable, governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD;11. There is no apparent conflict of interest;12. The Education Protection Account allocation and expenditures, audited financial statements, and the most current governing board-approved LCAP are posted on the charter school's website;13. The LCAP is submitted to the appropriate agencies;
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<i>An existing school that, at a minimum, meets all of the Required Criteria and at least four of the Supplemental Criteria listed below would be assessed eligible to be considered as Accomplished [Rating of 4].</i>	<i>An existing school that, at a minimum, meets all of the Required Criteria and at least three of the Supplemental Criteria listed below would be assessed eligible to be considered as Proficient [Rating of 3].</i>
<p>LCAP submitted to the appropriate agencies, are posted on the charter school's website;</p> <ol style="list-style-type: none">13. The LCAP is submitted to the appropriate agencies;14. Reasonable requests for information made by the Charter Schools Division and LAUSD are consistently processed or submitted by the charter school in a timely manner;15. There are no discrepancies cited in the Areas Noted for Further Growth and/or Improvement;16. If applicable (when audited and unaudited actuals do not mirror each other), adequate explanations are provided by the school for significant variances between audited and unaudited actuals, and there are no indications of the school's potential lack of internal controls over financial statements;17. Proper segregation of duties is consistently in place;18. If applicable, there are no outstanding fiscal-related tiered intervention notices issued to the school; or the school has no tiered intervention notices as of the oversight report issuance date; and19. If applicable, all LAUSD Board of Education-approved fiscal benchmark(s) are fully met by the required deadline(s); or the school has no fiscal benchmarks in its current charter term. <p><u>Note:</u> Other circumstances and information could influence the rating, which may include the supplemental criteria below, and will be noted in the evaluation.</p> <p><u>SUPPLEMENTAL CRITERIA</u></p> <ol style="list-style-type: none">1. The school maintains the minimum reserve for economic uncertainties as defined in California Code of Regulations (CCR), Title 5, Section 15450 (https://www.law.cornell.edu/regulations/california/5-CCR-Sec-15450) per the most current audit (i.e., unrestricted fund balance divided by total expenditures);2. The cash balance at the beginning of the school year is at least 5% of the prior year's expenses;	<ol style="list-style-type: none">14. Reasonable requests for information made by the Charter Schools Division and LAUSD are generally processed or submitted by the charter school in a timely manner;15. There are no significant recurring issues cited in the Areas Noted for Further Growth and/or Improvement;16. If applicable (when audited and unaudited actuals do not mirror each other), at least partial explanations are provided by the school for significant variances between audited and unaudited actuals, and there are no indications of the school's potential lack of internal controls over financial statements;17. Proper segregation of duties is generally in place;18. If applicable, the charter school is in the process of resolving outstanding fiscal issues cited in a Notice issued by the CSD as part of its tiered intervention process; and19. If applicable, all LAUSD Board of Education-approved fiscal benchmark(s) are partially met by the required deadline(s). <p><u>Note:</u> Other circumstances and information could influence the rating, which may include the supplemental criteria below, and will be noted in the evaluation.</p> <p><u>SUPPLEMENTAL CRITERIA</u></p> <ol style="list-style-type: none">1. The school maintains the minimum reserve for economic uncertainties as defined in California Code of Regulations (CCR), Title 5, Section 15450 (https://www.law.cornell.edu/regulations/california/5-CCR-Sec-15450) per the most current audit (i.e., unrestricted fund balance divided by total expenditures);2. The cash balance at the beginning of the school year is at least 5% of the prior year's expenses;3. Enrollment is stable or changing at a manageable rate (e.g., the school still maintains a balanced budget, etc.);



<i>An existing school that, at a minimum, meets all of the Required Criteria and at least four of the Supplemental Criteria listed below would be assessed eligible to be considered as <u>Accomplished</u> [Rating of 4].</i>	<i>An existing school that, at a minimum, meets all of the Required Criteria and at least three of the Supplemental Criteria listed below would be assessed eligible to be considered as <u>Proficient</u> [Rating of 3].</i>
<ol style="list-style-type: none">3. Enrollment is stable or changing at a manageable rate (e.g., the school still maintains a balanced budget, etc.);4. The school maintains sound short-term financial viability (i.e., current ratio is recommended to be at least 1.2 or 120%);5. The school maintains sound long-term financial sustainability (i.e., debt ratio is recommended to be lower than 1.0 or 100%); and6. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at governing board meetings.	<ol style="list-style-type: none">4. The school maintains sound short-term financial viability (i.e., current ratio is recommended to be at least 1.2 or 120%);5. The school maintains sound long-term financial sustainability (i.e., debt ratio is recommended to be lower than 1.0 or 100%); and6. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at governing board meetings.

<i>An existing school that, at a minimum, meets all of the Required Criteria, and at least two of the Supplemental Criteria listed below would be assessed eligible to be considered as <u>Developing</u> [Rating of 2].</i>	<i>An existing school would be assessed as <u>Unsatisfactory</u> [Rating of 1] based on the statements below:</i>
<p style="text-align: center;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none">1. Net Assets are positive in the most current audit; net assets are negative with strong trend towards becoming positive (be positive at the end of the third year per the applicable interim financials); or the school's financial condition fluctuates from year to year, with significant net losses, leading to negative net assets in the current fiscal year and/or the foreseeable future fiscal years;2. The cash balance at the beginning of the school year is positive; and3. Governing board approves Fiscal Policies and Procedures, at a minimum, once prior to each charter renewal term. <p><u>Note:</u> Other circumstances and information could influence the rating, which may include the supplemental criteria below, and will be noted in the evaluation.</p> <p style="text-align: center;"><u>SUPPLEMENTAL CRITERIA</u></p>	<p><i>An Unsatisfactory rating is assessed based on the following conditions, including, but not limited to:</i></p> <p>A charter school is assessed as Unsatisfactory if the charter school does not meet the criteria for <i>Accomplished</i>, <i>Proficient</i>, or <i>Developing</i>. The charter school was given a certain period of time to address the fiscal concerns of LAUSD, but failed to provide a satisfactory response. The charter school has shown no <i>feasible</i> financial plans, and/or immediate sources of funding to maintain a viable budget and/or sustain the school's operation to mitigate the negative fiscal condition. The charter school's governing board members and/or leadership lack fiscal capacity.</p> <p>Continued operation of a charter school that is assessed as Unsatisfactory may result to non-implementation of instructional programs as provided in the petition.</p> <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>



<p><i>An existing school that, at a minimum, meets all of the Required Criteria, and at least two of the Supplemental Criteria listed below would be assessed eligible to be considered as <u>Developing</u> [Rating of 2].</i></p> <ol style="list-style-type: none">1. The school maintains the minimum reserve for economic uncertainties as defined in California Code of Regulations (CCR), Title 5, Section 15450 (https://www.law.cornell.edu/regulations/california/5-CCR-Sec-15450) per the most current audit (i.e., unrestricted fund balance divided by total expenditures);2. The cash balance at the beginning of the school year is at least 5% of the prior year's expenses;3. Enrollment is stable or changing at a manageable rate (e.g., the school still maintains a balanced budget, etc.);4. The school maintains sound short-term financial viability (i.e., current ratio is recommended to be at least 1.2 or 120%);5. The school maintains sound long-term financial sustainability (i.e., debt ratio is recommended to be lower than 1.0 or 100%); and6. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at governing board meetings.	<p><i>An existing school would be assessed as <u>Unsatisfactory</u> [Rating of 1] based on the statements below:</i></p>
<p><i>A new school that, at a minimum, meets all of the Required Criteria listed below would be assessed eligible to be considered as <u>Developing</u> [Rating of 2].</i></p> <p><u>New Schools:</u></p> <p style="text-align: center;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none">1. Interim reports and/or unaudited actuals project positive net assets;2. Projected debt, if any, is managed efficiently and will not cause the charter school to end the fiscal year with negative net assets. The non-profit organization is financially viable to support the charter school;3. If enrollment is significantly below the enrollment per the school's <i>Pupil Estimates for New or Significantly Expanding Charters</i> report and/or its approved petition budget, the charter school has made significant adjustments in their operations to allow for the reduced income, and submitted a revised viable three-year budget and three-year cash flow projections;	<p><i>A new school would be assessed as <u>Unsatisfactory</u> [Rating of 1] based on the statements below:</i></p> <p><u>New Schools:</u></p> <p><i>An Unsatisfactory rating is assessed based on the following conditions, including, but not limited to:</i></p> <p>A charter school is assessed as Unsatisfactory if the charter school does not meet the criteria for <i>Developing</i>. The charter school was given a certain period of time to address the fiscal concerns of LAUSD but failed to provide a satisfactory response. The charter school has shown no <i>feasible</i> financial plans, and/or immediate sources of funding to maintain a viable budget and/or sustain the school's operation to mitigate the negative fiscal condition. The charter school's governing board members and/or leadership lack fiscal capacity.</p>



A new school that, at a minimum, meets all of the Required Criteria listed below would be assessed eligible to be considered as Developing [Rating of 2].

4. Governing Board adopts the annual budget;
5. The governing board reviews and discusses the charter school's financial reports as evidenced by the governing board meeting minutes;
6. Reasonable requests for information made by the Charter Schools Division and LAUSD are processed or submitted by the charter school in a timely manner;
7. The most current governing board-approved LCAP is posted on the charter school's website; and
8. The LCAP is submitted to the appropriate agencies.

Note: Other circumstances and information could influence the rating and will be noted in the evaluation.

A new school would be assessed as Unsatisfactory [Rating of 1] based on the statements below:

Continued operation of a charter school that is assessed as Unsatisfactory may result to non-implementation of instructional programs as provided in the petition.

Note: Other circumstances and information could influence the rating and will be noted in the evaluation.

July Julio						
Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					
14 Instructional Days Días de Instrucción						

August Agosto						
Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		
14 Instructional Days Días de Instrucción						

September Septiembre						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
19 Instructional Days Días de Instrucción						

October Octubre						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				
22 Instructional Days Días de Instrucción						

November Noviembre						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		
14 Instructional Days Días de Instrucción						

December Diciembre						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						
13 Instructional Days Días de Instrucción						

January Enero						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			
17 Instructional Days Días de Instrucción						

February Febrero						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		
20 Instructional Days Días de Instrucción						

March Marzo						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						
14 Instructional Days Días de Instrucción						

April Abril						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				
21 Instructional Days Días de Instrucción						

May Mayo						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	
22 Instructional Days Días de Instrucción						

June Junio						
Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						
4 Instructional Days Días de Instrucción						

Instructional/Event Day Color Key*

Clave de color del Día de Instrucción/ Eventos*

	Summer School (ELOP) Escuela de Verano (ELOP)
	No classes: Holiday or Pupil Free Day No Clases: Días festivos o Día para Estudiantes
	Instructional Day Día de Instrucción

	PUENTE Charter School Parent Event Evento de Padres de PUENTE Charter School
	PUENTE Learning Center Event Evento de PUENTE Learning Center
	Parent Conferences Conferencias de Padres

*Events are subject to change for updated information please consult ParentSquare. *Los eventos están sujetos a cambios para obtener información actualizada, consulte ParentSquare.



PUENTE Charter School 2023-2024 School Calendar | Calendario escolar

Monthly Parent Engagement Event Opportunities*

Coffee with Administration – 1st Tuesday of the Month

Meetings are held where deep conversations and active participation in regards to school updates including the development of our Local Control Accountability Plan.

Getting Ready for College Presentations: Short presentations during Coffee with Administration on building a foundation through a child's primary years that will get them to post-secondary success in the future. Topics include how to bring college into family discussions, family reading, weekend outings, and financial planning

Community Connections Nights – 2nd Tuesday of the Month

Workshops for all parents/caregivers, adult students, and families! Each month various resources in the community will be highlighted. These include mental health and wellness, nutrition and cooking, financial literacy, and Know your Rights workshops.

Student Recognition Ceremony – 2nd Friday of the Month

Join us to celebrate the achievements of our students! Students are recognized for their monthly attendance and academic achievements.

English Learner Advisory Committee (ELAC) – 3rd Wednesday of the Month

Responsible for advising the principal and staff on programs and services for English learners. This committee will also help with the development of the school's needs assessment and ways to make parents aware of the importance of regular school attendance.

Family Nights – 3rd Thursday of the Month

We strongly encourage all parents/caregivers and Charter School students to attend Family Night Meetings. Strengthening the home/school connection and relationship through engaging interactives and recognition of students who have attained perfect attendance will be the focus of the meetings.

Oportunidades Mensuales de Participación de Eventos de Padres*

Café con la Administración – 1er martes del Mes

Se llevan a cabo reuniones donde hay conversaciones profundas y participación activa con respecto a las actualizaciones de la escuela, incluido el desarrollo de nuestro Plan de responsabilidad de control local.

Presentaciones Preparándose para La Universidad: Breves presentaciones durante Café con la Administración sobre cómo construir una base a lo largo de los años de primaria de un niño que lo llevará al éxito posterior a la secundaria en el futuro. Los temas incluyen cómo llevar la universidad a las discusiones familiares, la lectura familiar, las salidas de fin de semana y la planificación financiera.

Noches de Conexiones Comunitarias – 2do martes del mes

¡Talleres para todos los padres/cuidadores, estudiantes adultos y familias! Cada mes se destacarán varios recursos en la comunidad. Estos incluyen salud mental y bienestar, nutrición y cocina, alfabetización financiera y talleres Conozca sus Derechos.

Ceremonia de reconocimiento de estudiantes – 2do viernes del mes

¡Únase a nosotros para celebrar los logros de nuestros estudiantes! Los estudiantes son reconocidos por su asistencia mensual y sus logros académicos.

Comité Asesor de Aprendices de Inglés (ELAC) – 3er miércoles del mes

Responsable de asesorar al director y al personal sobre programas y servicios para estudiantes de inglés. Este comité también ayudará con el desarrollo de la evaluación de las necesidades de la escuela y las formas de concientizar a los padres sobre la importancia de la asistencia regular a la escuela.

Noches Familiares – 3er jueves del mes

Recomendamos enfáticamente a todos los padres/cuidadores y estudiantes de la Escuela Chárter que asistan a las reuniones nocturnas familiares. El enfoque de las reuniones será fortalecer la conexión y la relación entre el hogar y la escuela a través de interacciones atractivas y el reconocimiento de los estudiantes que han logrado una asistencia perfecta.

Additional Events* Eventos Adicionales*

July Julio	25	Back to School Orientation with Administration Team Evento de Orientación de Regreso a la Escuela con Equipo de Administración
August Agosto	8	Meet & Greet Back to Classes Teacher Orientation Conocer y saludar Regreso a clases Orientación para maestros
September Septiembre	21	PUENTE Charter Family Night: Back to School Night Noche familiar de PUENTE Charter: Noche de Regreso a la Escuela
October Octubre	5	PUENTE Learning Center Fall Fundraiser Event Evento de Recaudación de Fondos de Otoño de PUENTE Learning Center
November Noviembre	16	Parent Conferences Conferencias de padres
March Marzo	16	Team PUENTE at LA Big 5K (Spring Fundraiser) Equipo PUENTE en LA Big 5K (Recaudación de fondos de primavera)
March Marzo	17	Team PUENTE at LA Half-Marathon & LA Marathon Equipo PUENTE en LA Half-Marathon y LA Maratón
March Marzo	21	Parent Conferences Conferencias de Padres

*Events are subject to change for updated information please consult ParentSquare. *Los eventos están sujetos a cambios para

COMPREHENSIVE THERAPY ASSOCIATES, INC.
Comp Therapy
SERVICES AND CONSULTING AGREEMENT

This Services and Consulting Agreement (this “Agreement”) is entered into effect as of July 1st, 2023, by and between Comprehensive Therapy Associates, Inc. (“Comp Therapy”) located at 1017 N. Lake St. Burbank, CA 91502 and PUENTE Charter (“Client”) located at 501 S Boyle Ave, Los Angeles, CA 90033 (“service location”).

RECITALS

Comp Therapy is a registered Non-Public Agency (NPA Code: 1A-19-532) with the California Department of Education.

WHEREAS, Client is a California nonprofit public benefit corporation that offers educational programs to students identified at its public or private schools (“Service Location”); and

WHEREAS, Comp Therapy wishes to provide certain services with respect to education and/or other social services to Client at the Service Location (the “Services”);

NOW THEREFORE, in consideration of the premises and covenants herein contained, and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the parties hereto agree as follows:

AGREEMENT

In consideration of the promises and covenants contained herein, the parties agree as follows:

1. COMMENCEMENT DATE AND TERM

This Agreement shall commence at 12:01 a.m. on July 1st, 2023 (the “Commencement Date”) and shall continue until 11:59 p.m. on June 30th, 2024 (the “Term”).

2. RESPONSIBILITIES OF COMP THERAPY

A. COMPLIANCE WITH LAWS

- a. During this Agreement, Comp Therapy shall comply with all applicable federal and state statutes, laws, ordinances, and regulations (including, but not limited to, applicable and active health orders) relating to its business in general and the provision of special education services.

- b. Comp Therapy shall ensure that all Comp Therapy Personnel are qualified to provide services to students under the Individuals with Disabilities Education Act (IDEA). All instructors and therapists ("Comp Therapy Personnel") provided by Comp Therapy under this Agreement will meet State of California requirements for providing the Services; such as holding an applicable California credential, certification or license and TB test clearance appropriate for providing the requested service. Upon the client's written request, Comp Therapy shall provide a list of all Comp Therapy Personnel that currently serve or will serve students enrolled in the Program. Such list will identify the credentials and/or licenses held by each Comp Therapy Personnel. Comp Therapy shall notify Client within a commercially reasonable timeframe of any change concerning Comp Therapy Personnel who provide Services directly to students under this Agreement. An officer of Comp Therapy shall certify to Client that Comp Therapy Personnel providing instruction or therapy services hereunder are trained to and accept full responsibility to act as mandated child abuse reporters pursuant to California State Law.
- c. Comp Therapy shall conduct all required background and qualification checks, including but not limited to Live Scan fingerprinting of personnel through the Department of Justice ("DOJ") database as required by the applicable law and, upon receipt of DOJ clearance, certify to Client that no Comp Therapy Personnel working with students of Client have been convicted of a violent or serious felony (as defined by applicable law) or are the subject of a criminal action pending upon charges of commission of a violent or serious felony (as defined by applicable law). Comp Therapy shall fill out the form "Vendor Certification of Criminal Background Clearance, Tuberculosis (TB) Clearance, and Credential Verification" for any Comp Therapy Personnel working with or around students. The certification shall be submitted to Client before any Comp Therapy Personnel is allowed onto a school site. Upon request by Client, Comp Therapy shall submit the most recent certification to Client with five (5) business days of the request. Comp Therapy is required to notify Client in the event of any changes to the Comp Therapy Personnel on a school site and, as necessary, fill out new or updated "Vendor Certification of Criminal Background Clearance, Tuberculosis (TB) Clearance, and Credential Verification" forms. Comp Therapy will request and receive subsequent arrest notifications for the Comp Therapy Personnel from the DOJ to ensure ongoing safety of students.
- d. Comp Therapy shall pay, withhold, and transmit payroll taxes; provide unemployment, workers' compensation, and all other required insurances; and handle unemployment and workers' compensation claims involving Comp Therapy Personnel.

B. INSURANCE

- a. Insurance Obligations of Comp Therapy. Comp Therapy shall procure and maintain the following insurance while this Agreement is in effect:
 - i. General and Professional Liability. General and professional liability insurance covering all activities of Comp Therapy Personnel at Client's facilities in performance of Comp Therapy obligations under this Agreement with coverage of not less than- One Million Dollars (\$1,000,000) for any incident ,Two Million Dollars (\$2,000,000) annual aggregate per incident, and Three Million Dollars (\$3,000,000) excess liability policy for a maximum of Five Million Dollars (\$5,000,000) per aggregate limit Comp Therapy agrees to provide Client with a Certificate of Insurance naming Client as an additional insured on such general and professional liability insurance policies. Policies will be furnished to Client for review upon request.
 - ii. Worker's Compensation. Worker's disability compensation insurance covering each Comp Therapy employee providing Services to Client hereunder; insurance shall comply with all applicable legal requirements.

3. RESPONSIBILITIES OF CLIENT

A. COMPLIANCE WITH LAWS

- a. Comply with all applicable federal, state, and local laws, ordinances and regulations relating to this Agreement and to Comp Therapy Personnel, as well as all laws and regulations relating to Special Education.

B. INSURANCE

- b. Insurance Obligations of Client. Client shall procure and maintain the following insurance while this Agreement is in effect:
 - i. General and Professional Liability. General and professional liability insurance covering all activities of Client and Client Personnel at Client's facilities in performance of Client's obligations under this Agreement with coverage of not less than One Million Dollars (\$1,000,000) for any incident, and Two Million Dollars (\$2,000,000) annual aggregate per incident and Three Million (\$3,000,000) excess liability policy for a maximum of Five Million Dollars (\$5,000,000) per aggregate limit. Client agrees to provide Comp Therapy with a Certificate of Insurance naming Comp Therapy as an additional insured on such general liability and professional insurance policies.

- ii. Worker's Compensation. Worker's disability compensation insurance covering the activities of each Client employee providing services to students in the Program; insurance shall comply with all applicable legal requirements.

C. ADDITIONAL RESPONSIBILITIES OF CLIENT

- a. Client shall provide Comp Therapy Personnel with a safe and secure work site, any and all appropriate information, equipment, furnishings and space for Comp Therapy Personnel to conduct their work as requested at no additional cost to Comp Therapy.
- b. Client shall provide Comp Therapy personnel with all necessary student information, including documents in Client's possession, so that Comp Therapy is able to properly carry out services and duties listed under this Agreement. Such information and documents may include but are not limited to, individual needs of students in the Program, evaluations, reports, observations, and details regarding the student's health history.
- c. Client shall notify Comp Therapy at least 10 business days in advance of any new Services requested by the Client that were not originally listed on Exhibit A. Comp Therapy shall have up to 5 business days after such notice to notify the Client whether it has the ability to carry out the new requests, whether the new requested services are outside of its agreed Services to be provided as detailed on Exhibit A, or if the requested service(s) would change any existing fee structure.

4. COMPENSATION AND METHOD OF PAYMENT

Payment Terms, Bill Rates, and Fees

- A. Client will pay Comp Therapy for Comp Therapy's services at the rate(s) stated in Exhibit A, and will also pay any additional costs or fees set forth in this Agreement for services authorized in writing by Client. Client will not be liable for any costs or expenses (e.g., travel, lodging, per diem) associated with any services not expressly authorized. Each invoice shall include only charges for service described in this Agreement. Invoices shall be submitted to Client's Accounts Payable Department. All communication regarding payment status shall be made to Client's Accounts Payable Department and Comp Therapy.
 - a. Comp Therapy will provide invoices to Client by the 15th of each month for services provided the preceding month.
 - b. Fees are due and payable to Comp Therapy within thirty (30) calendar days of receipt of the invoice. In the event an invoice is not timely paid, Client agrees to pay a service charge on any outstanding amount at the rate of maximum allowed by law or 1% per month, whichever is higher. Late payment may also result in immediate

suspension of Comp Therapy's services under this agreement at Comp Therapy's sole discretion.

- c. If a portion of any invoice is disputed, Client agrees to pay the undisputed portion and Comp Therapy and Client shall use their best reasonably good faith efforts to resolve such dispute within the thirty (30) calendar day period following notice of the dispute. Client will provide to Comp Therapy all student and other record materials relevant to the disputed charges. If such dispute cannot be resolved within such thirty (30) day period, either Comp Therapy or Client may terminate this Agreement, with at least a thirty (30) business day written notice and either party, regardless of whether the Agreement is then terminated, shall have the right to submit the dispute to arbitration in accordance with Paragraph 10 below.

Comp Therapy will provide Client with following documents with monthly invoice:

- i. Copies of Service Logs from Comp Therapy Personnel who provided services at designated Service Location

5. NO HIRING AGREEMENT

- A. Client acknowledges that Comp Therapy's employees are a unique and valuable resource of Comp Therapy, who have been trained by Comp Therapy, and that but for this Agreement and Comp Therapy's services rendered to the Client, the Client would not have access to Comp Therapy's employees and knowledge of their true performance and capabilities. In addition, Client acknowledges that Comp Therapy employees may have certain legal obligations arising from contract or otherwise to Comp Therapy that may restrict Comp Therapy employees from working for competitors or unfairly working in direct competition with Comp Therapy. As such, Client agrees to a 365-day "No Hire" period for any of Comp Therapy's employees. If the Client uses the services of a Comp Therapy Personnel as its direct employee, independent contractor, or subcontractor during or within 365 days after any assignment of Comp Therapy Personnel to Client through Comp Therapy, Client must immediately notify Comp Therapy and pay Comp Therapy a placement fee in the amount of \$7,500. Comp Therapy reserves the right to modify, waive, or reduce the placement fee, with at least thirty (30) days' prior written notice to Client.

6. CONFIDENTIAL INFORMATION

- A. Comp Therapy and Client agree to keep confidential and not to disclose to any third parties any information provided by Comp Therapy or otherwise learned by Client during the course of this Agreement without the prior written consent of Comp Therapy. This provision shall survive the expiration and termination of this Agreement. Comp Therapy and Client warrant that, to the best of their knowledge, all their operations are compliant with all federal and state laws, rules, and regulations pertaining to the privacy and/or security of personal data.

Client further agrees not to share any "confidential data" with any other vendor without first disclosing to Comp Therapy in writing all pertinent data fields and records to be provided, and receiving written authorization from Comp Therapy permitting the Client to provide the data to a third party.

7. INDEMNIFICATION AND LIMITATION OF LIABILITY

- A. Comp Therapy shall indemnify, defend, and hold harmless Client and Client's parents, subsidiaries, affiliated entities, directors, owners, agents, representatives, attorneys, insurers and employees, from and against all losses, liabilities, expenses, and claims for damages (including court costs and reasonable attorney's fees) which may be asserted or claimed against Client as a result of Comp Therapy's negligence or willful and unlawful conduct, including without limitation any violation or breach of this Agreement.
- B. Client shall indemnify, defend, and hold harmless Comp Therapy and Comp Therapy's parents, subsidiaries, affiliated entities, directors, owners, agents, representatives, attorney, insurers and employees, from and against all losses, liabilities, expenses, and claims for damages (including court costs and reasonable attorney's fees) which may be asserted or claimed against Comp Therapy as a result of Client's negligence or willful and unlawful conduct, including without limitation any violation or breach of this Agreement in accordance with California law.
- C. The maximum amount of damages for which Comp Therapy shall be liable to Client for any claims, losses, liabilities, expenses or damages arising out of or in connection with this Agreement or Comp Therapy's performance hereunder shall not exceed the total fees paid or payable by Client to Comp Therapy under this Agreement, as stipulated by California law.

8. TERM OF AGREEMENT

- A. This Agreement shall begin on the date first written above and shall expire on the date stated in this Agreement or until terminated by either party. Either party may terminate this Agreement, without cause, upon at least sixty (60) business days prior written notice.
- B. Either party reserves the right to immediately terminate this Agreement in the event:
 - a. Client or Comp Therapy breaches any material form, condition or duty under this Agreement, including but not limited to, in the case of Client, the failure to timely pay any amounts due to Comp Therapy, provided that Comp Therapy gives written notice of such breach and Client does not pay Comp Therapy the amount (plus any interest due thereon within five (5) business days of such notice;
 - b. If required by law or regulation; or

- c. If Client, or Comp Therapy becomes insolvent or commits any act of bankruptcy, or a petition for involuntary bankruptcy is filed against either party, or either party makes general assignment for the benefit of creditors under the bankruptcy or insolvency laws.
- C. Client reserves the right to immediately terminate this Agreement in the event of: (a) the bankruptcy or insolvency of Comp Therapy; (b) sale of business of Comp Therapy; or (c) material breach of any term or condition of this Agreement.
- D. Upon termination, Comp Therapy shall have no further obligation to provide Client with Comp Therapy Personnel. The provisions regarding Confidential Information and Cooperation shall continue in effect subsequent to and regardless of termination of this Agreement.

9. INDEPENDENT CONTRACTORS

- A. The parties hereto acknowledge and agree that the relationship created between Comp Therapy and Client as a result of this Agreement is strictly that of independent contractors. Nothing contained herein shall be deemed to be any partnership, joint venture, principal-agent, fiduciary-beneficiary, or other relationship. Comp Therapy shall be responsible for all compensation, salaries, taxes, withholdings, contributions, benefits (if any), and worker's disability compensation insurance with respect to all Comp Therapy Personnel employed or contracted by such party and shall indemnify, defend, and hold harmless the other party and its officer, directors, agents, contractors, representatives and employees, from and against any and all liability, loss, damages, claims, causes of action, and expenses associated therewith (including without limitation attorney's fees) caused or asserted to have been caused, directly or indirectly, by or as a result of same. The provisions of this Section shall survive the expiration or termination for any reason of this Agreement. Comp Therapy shall complete and submit a Form W-9 to Client prior to rendering services in accordance with California Law.

10. MISCELLANEOUS

- A. The parties intend that the benefits of this Agreement shall inure only to Comp Therapy and Client and not to any third person or party.
- B. No waiver, amendment, or modification of this Agreement shall be effective unless the waiver, amendment, or modification is in writing and signed and dated by the parties.
- C. If any term, provision, covenant or condition of this Agreement shall be held by a court of competent jurisdiction to be invalid, void or unenforceable, in whole or in part, such decision shall not affect the validity of any remaining portion, and the remaining portion shall stand in full force and effect, and shall in no way be affected, impaired or invalidated. Any provisions thus affected shall be modified to the extent necessary to bring the provision within the applicable requirements of the law.

- D. This Agreement, including attached exhibit(s), constitutes the entire Agreement between the parties regarding its subject matter, and supersedes all prior agreements and understandings between the parties, whether oral or written, relating to its subject matter.
- E. The provisions of this Agreement shall benefit and bind the parties and their respective heirs, representatives, successors, and assigns.
- F. A party's delay or failure to enforce any of the stated provisions of this Agreement on one or more occasions will not be a waiver of that or any other occasion(s) or of the party's right thereafter to enforce each and every provision of this Agreement.
- G. A party shall have no right or power to and shall not purport to transfer or assign this Agreement without prior written consent from the other party.
- H. Governing Law: This Agreement shall be governed by the laws of the State of California. It may be executed in several counterparts and constitutes the entire agreement for the service described. If any provision in this contract is held by any court to be invalid, void, or unenforceable, the remaining provisions shall continue in full force. Any legal action arising from, involving or relating to this Agreement shall be brought in a court of competent jurisdiction located in Los Angeles, California. Both parties agree and hereby release their rights to a trial by jury.
- I. Attorney's Fees: If any legal action or any arbitration or other proceedings are brought for the interpretation or enforcement of this Agreement, or any rights of the parties with regard to this Agreement, and/or any related agreement, or because of an alleged dispute, breach, or default, the successful or prevailing party shall be entitled to recover its reasonable attorney's fees and expenses, and any costs associated with any enforcement proceeding.
- J. Notices: Any notice, request, demand, consent, approval or other communication required or permitted under this Agreement must be in writing and will be deemed to have gone into effect (a) on actual delivery, if delivery is by hand, or (b) on receipt if delivery is by facsimile, or (c) five (5) days after deposit in the U.S. mail, postage prepaid, certified or registered mail, return requested. Each such notice shall be sent to respective parties at the address indicated below.

11. CONFLICTS OF INTEREST

- A. Comp Therapy warrants that no part of the total amounts paid by Client shall be paid directly or indirectly to an employee or official of Client as wages, compensation, or gifts in exchange for acting as an officer, agent, employee, subcontractor, or consultant to Comp Therapy in connection with any work contemplated or performed relative to this Agreement. Comp Therapy acknowledges, understands, and agrees that this Agreement

shall be null and void as determined by Client if Comp Therapy is an entity in which a controlling interest is held by an individual who is, or within the past six months has been, an employee of Client.

12. NONDISCRIMINATION

- A. Comp Therapy hereby agrees, warrants, and assures that no person shall be excluded from participation in, be denied benefits of, or be otherwise subjected to discrimination in the performance of this Agreement or in the employment practices of Comp Therapy on the grounds of that individual's race; color; gender (including gender identity and gender expression); sex (including pregnancy, childbirth, breastfeeding, and related medical conditions); religious creed (including religious dress and grooming practices); marital/registered domestic partner status; age (forty (40) and over); national origin or ancestry (including native language spoken); physical or mental disability (including HIV and AIDS); medical condition (including cancer and genetic characteristics); taking a leave of absence authorized by law; genetic information; sexual orientation; military and veteran status; or any other consideration made unlawful by federal, state, or local laws.

13. RECORDS

- A. Comp Therapy shall maintain documentation for all charges under this Agreement. The books, records, and documents of Comp Therapy, insofar as they relate to work performed or money received under this Agreement, shall be maintained for a period of seven (7) full years or longer as required by law from the date of the final payment and shall be subject to audit at any reasonable time and upon reasonable notice by Client or their duly appointed representatives. The financial statements shall be prepared in accordance with generally accepted accounting principles and applicable California law.

14. PRESS RELEASES

- A. The parties hereto acknowledge and agree to not use the name of or make reference to Client or Comp Therapy for any purpose in any releases for public or private dissemination, advertising or other materials, without the prior written consent of Client and Comp Therapy.

15. FERPA/IDEA

- A. This Agreement is entered into by Comp Therapy and Client in accordance with the provisions of the Family Educational Rights and Privacy Act, 20 U.S.C. Section 1231(g), et seq., (FERPA) and the Individuals with Disabilities Education Act, 20 U.S.C. Section 1400, et seq., (IDEA). Comp Therapy hereby acknowledges that all documents which include personally identifiable information contained in or derived from a student's education records are deemed confidential pursuant to FERPA and IDEA. Comp Therapy agrees not to re-disclose any such personally identifiable information without prior written consent as required by law, or unless re-disclosure is otherwise authorized by law. Comp Therapy agrees that nothing in this Agreement may be construed to allow either Comp Therapy or Client to maintain, use, disclose, or share the personally identifiable information in a manner not allowed under Federal or State law or regulation, including the California Consumer Privacy Act (CCPA).

- B. Comp Therapy agrees to comply with all applicable laws that require notification of individuals in the event of an unauthorized release of personally identifiable information or other event requiring notification, In the event of a breach of any of Comp Therapy's security obligations, or any other event requiring notification under applicable law, Comp Therapy agrees to:
 - a. Immediately notify Client of such event with 24 hours of discovery; and
 - b. Cooperate with Client to inform all such individuals in accordance with applicable laws; and
 - c. Indemnify, hold harmless, and defend Client and its Board Members, administrators, employees, agents, attorneys, volunteers, subcontractors, and related entities and persons, from and against any claims, damages, fees, or other harm related to such a data breach.
- C. Within thirty (30) days after termination of this Agreement, Comp Therapy will return all personally identifiable information that is in written, electronic, or other tangible form, computer memory, or any hard copy records to Client as well as purge any copies of the personally identifiable information. Comp Therapy agrees to require all employees, contractors, or agents of any kind working on the project to comply with this provision.

16. Force Majeure

- A. The obligations of the parties to this Agreement are subject to prevention or delay caused by events that are outside of their reasonable control, including, but not limited to, natural disasters, acts of terrorism, riots, wars, epidemics, or any other similar cause, provided that the parties have taken all reasonable steps to avoid or mitigate the effects of any such event.

Any party may change its address for purposes of this Section by giving the other party written notice as provide in this Section.

The parties, intending to be legally bound, duly execute this Agreement as of the date stated above.

CLIENT

Printed Name: _____ Title: _____

Signature: _____ Date: _____

Email Invoices to: _____ Email Address: _____

Comp Therapy

Printed Name: Daniela Garcia, MS, Special Education Title: Regional Director

Signature: *Daniela Garcia* Date: 05/24/2023

Exhibit A

ASSESSMENT, SERVICE AND CONSULTATION FEE

Assessment / Service / Consultation Type	Hourly Rate
Program Administrator/Consultation	\$ 220
Adapted Physical Education (APE)	\$ 145
Assistive Technology (AT)	\$ 145
Augmentative Alternative Communication (AAC)	\$ 145
Behavior Intervention Implementation (BII) [CPI and ABA Trained]	\$ 52
Behavior Intervention Development (BID)	\$ 124
Functional Behavior Assessment (FBA) Completed by Board Certified Behavioral Analyst (BCBA)	\$ 124
Case Manager / Academic Assessment	\$ 113
Marriage and Family Therapist (MFT)	\$ 124
Pupil Personnel Counselor (PPS)	\$ 106
Deaf and Hard of Hearing (DHH)	\$ 157
Health Services	
Certified Nursing Assistant (CNA)	\$ 48
Licensed Vocational Nurse (LVN)	\$ 58
School Nurse/Registered Nurse (RN)	\$ 113
Health Assessment	\$ 375 flat rate
Vision, Hearing, and Scoliosis Screening	\$ 9 per student
Occupational Therapist (OT)	\$ 124
Certified Occupational Therapist Assistant (COTA)	\$ 94
Psycho-Educational Assessment	\$ 124
Psycho-Educational Assessment – Bilingual	\$ 146
Specialized Academic Instructor (SAI)	\$ 81
Specialized Academic Instructor Aide (SAIA)	\$ 52
Speech-Language Pathologist (SLP)	\$ 124
Speech-Language Pathologist Assistant (SLPA)	\$ 94
Interpreter Services	
Translation Services – Written Reports/IEPs	\$ 113
Independent Education Evaluation - IEE	\$ 195

In compliance with California law and code, Comp Therapy and Client must ensure that all its non-exempt employees are provided with the required number of breaks as prescribed by law when services are provided at Client work site.

ASSESSMENTS

For Scheduled Assessments: To avoid a 3-hour service fee, Client must notify the assessor or Comp Therapy at least one business day in advance, if there will be a change in school/student schedule or if the student is absent. Once assessor is in-route or on site, and unable to assess student, Client will be charged a 3-hour service fee.

Off Site Hours: Off-site hours will be billed in 15-minute increments. Assessment Reports, IEP Development, Consultations/Collaboration, or Interviews may be completed off-site.

RUSH Rate: If Client requests an assessment to be completed in less than 40 calendar days or less of deadline. Client will be charged RUSH RATE of \$155 per hour. Health Assessment RUSH Rate will be charged at \$450 per assessment.

SERVICES

Program Administrator Fee: There is an annual one-time Program Set-up fee of \$450 for each school site. This includes the initial meeting and coordination with school personnel for assessments needs and special education services and coordination throughout the school year.

Minimum Service Charge: There is a 3-hour on-site minimum for all service providers, except BII/SAIA services have a 6-hour on-site minimum.

Schedule Change: If Client does not provide Comp Therapy with at least one business days' notice of a student absence or change in the school/student schedule, Client will be charged an amount equal to the scheduled service.

BII/SAIA Student Service: If a student is absent or the schedule is changed without notifying BII/SAIA, the Client will be charged a 6-hour service fee. BII/SAIA must be notified of any changes in the student's schedule prior to them being in-route or at the school site. The Client reserves the right to retain the BII/SAIA on site to carry out other duties within their scope of practice during the student's absence.

Cancellation of Meetings: If a meeting is canceled or postponed, Client must inform provider at least one day in advance. If Client fails to do so, they will be charged a 1-hour service fee.

Off Site Hours: Off-site hours will be billed in 15-minute increments which may include: IEP Development, Documentation/Prep, and Consultations.

Request for Providers: Clients can reserve service providers or assessors in advance; however, Comp Therapy does not guarantee a specific service provider or assessor may be available. When assigning providers, Comp Therapy always evaluates the needs of each Client.

IMPORTANT: All provider inquiries and change in providers must first be communicated with Comp Therapy Director and not directly with the provider.



Billing Descriptions for Related Service Providers

Description	Action Item	Average Billing	Maximum Billing
Direct Services	Provide direct services to students	Start to End Time	Start to End Time
Documentation	Session Notes	5 mins per student	10 mins per student
Prep Time/ Treatment Planning	Prep Time (per school)	30 mins per day	1 hour per day
IEP Development	Preparation for IEP meeting per student - Record/data review - Reporting on previous goals - Parent/teacher consult - Updating present levels of performance - Creating new goals - Updating services - Updating IEP information before/after IEP meeting to reflect IEP team discussion	1 hour	2 hours
IEP Meeting	IEP Meeting	Start to End Time	Start to End Time
Caseload Service	Review PLP/goals, add one new student to current caseload, update schedule	15	30
	Set-up new caseload of more than one student. Review PLP/goals, create schedule/groups	Start to End Time	Start to End Time
	Service Delivery Report (weekly, monthly)	15	30
	Progress reports (due during Report Card period; 3-4 times per year)	5 mins per student	10 mins per student
Collaboration	Teacher/Parent Consultation	Start to End Time	Start to End Time
	Collaboration with school site lead / sped team (email, phone, text, in-person, teleconference)	Start to End Time	Start to End Time

CONTRACT EXTENSION

☐ CHECK HERE IF ADDITIONAL PAGES ARE ATTACHED

Pages

Renewal (Extension Number)	Agreement Number (Base year)
1	2022

1. This Extension Agreement is entered into between the School Food Authority and Contractor named below:

SCHOOL FOOD AUTHORITY'S NAME

PUENTE Learning Center

FOOD SERVICE MANAGEMENT COMPANY'S NAME AND FEDERAL TAX IDENTIFICATION NUMBER

School Nutrition Plus

2. Base year contract term: Effective date: **7/1/2022** Expiration date: **6/30/2023**

Extension year: Effective date: **7/1/2023** Expiration date: **6/30/2024**



3. The maximum dollar amount of this contract is equal to the fixed cost per meal multiplied by the number of meals:
\$253,165.50 (maximum dollar amount)

4. The parties mutually agree to this extension as follows. All actions noted below are by this reference made a part of the Agreement and incorporated herein: **(Note: This section is used to indicate the current cost per meal. Please include your cost per meal table.)**

LINE ITEM	UNITS*	RATE	TOTAL
Breakfast	33,345	\$2.15	\$71,691.75
Unitized Lunch	38,475	\$3.76	\$144,666
Snacks	25,650	\$1.00	\$25,650
TOTAL		\$	\$242,007.75

2023-2024 COST PER MEAL (4.5% Increase per CPI for foods away from home Los Angeles)

LINE ITEM	UNITS*	RATE	TOTAL
Breakfast	33,345	\$2.25	\$75,026.25
Unitized Lunch	38,475	\$3.93	\$151,206.75
Snacks	25,650	\$1.05	\$26,932.50
TOTAL		\$	\$253,165.50

FOOD SERVICE MANAGEMENT COMPANY	
CONTRACTOR'S NAME <i>(If other than an individual, state whether a corporation, partnership, etc.)</i> School Nutrition Plus	
BY <i>(Authorized Signature)</i> 	DATE SIGNED <i>(Do not type)</i>
PRINTED NAME AND TITLE OF PERSON SIGNING Emily Burson, President	
ADDRESS 6424 Clara St., Bell Gardens, CA 90201	
SCHOOL FOOD AUTHORITY	
SCHOOL FOOD AUTHORITY NAME PUENTE Learning Center	
BY <i>(Authorized Signature)</i> 	DATE SIGNED <i>(Do not type)</i>
PRINTED NAME AND TITLE OF PERSON SIGNING Jerome Greening, Chief Executive Officer	
ADDRESS 501 S. Boyle Ave., Los Angeles, CA 90033	

INSTRUCTIONS FOR USE:

1. Enter renewal number (also known as extension number). The contract can only be extended four times. Indicate the extension by entering 1 for year 1 of the extension from the base year or 2, 3 or 4.
2. Enter agreement number. Every agreement (contract) should have a number assigned to identify that contract. If there is not an agreement number, identify the contract by the year of the contract also known as base year.
3. Item 1: Enter the contractor's and the school food authority's name.
4. Item 2: Enter the base year terms and the current extension terms. The term is the effective and expiration dates
5. Item 3: Enter the maximum dollar amount.
6. Item 4: Indicate **the current cost per meal**. Include the cost per meal table.
7. The contractor's and school food authority's authorized signer should be identified, and signatures provided.



EPA – EDUCATION PROTECTION ACCOUNT

About the Education Protection Account:

With the November 2012 passage of Proposition 30, which temporarily increases the personal income tax rates for upper-income taxpayers and the sales tax rate for all taxpayers, the state officially established the Education Protection Account (EPA). Revenue generated from the increased taxes are deposited into the EPA and distributed to districts and charter schools on a quarterly basis.

While funds from the EPA are part of a district's or charter school's general purpose funding, Proposition 30 specifies that EPA funds may not be used for salaries or benefits of administrators or any other administrative costs.

From an accounting perspective, EPA revenue and expenditures must be coded separately (under a new resource code, 1400, created specifically for EPA funds) and from an operational perspective, governing boards must determine the use of EPA funds at an open public meeting. This determination must occur annually.

In FY 2023-24, EPA funds are estimated to be 17% of a school's total Local Control Funding Formula (LCFF) base rate. For PUEENTE Charter School, this equates to \$808,000. The spending plan for PUEENTE Charter School allocates these funds to support teacher salaries and benefits.

LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Puente Charter

CDS Code: 19 64733 6120471

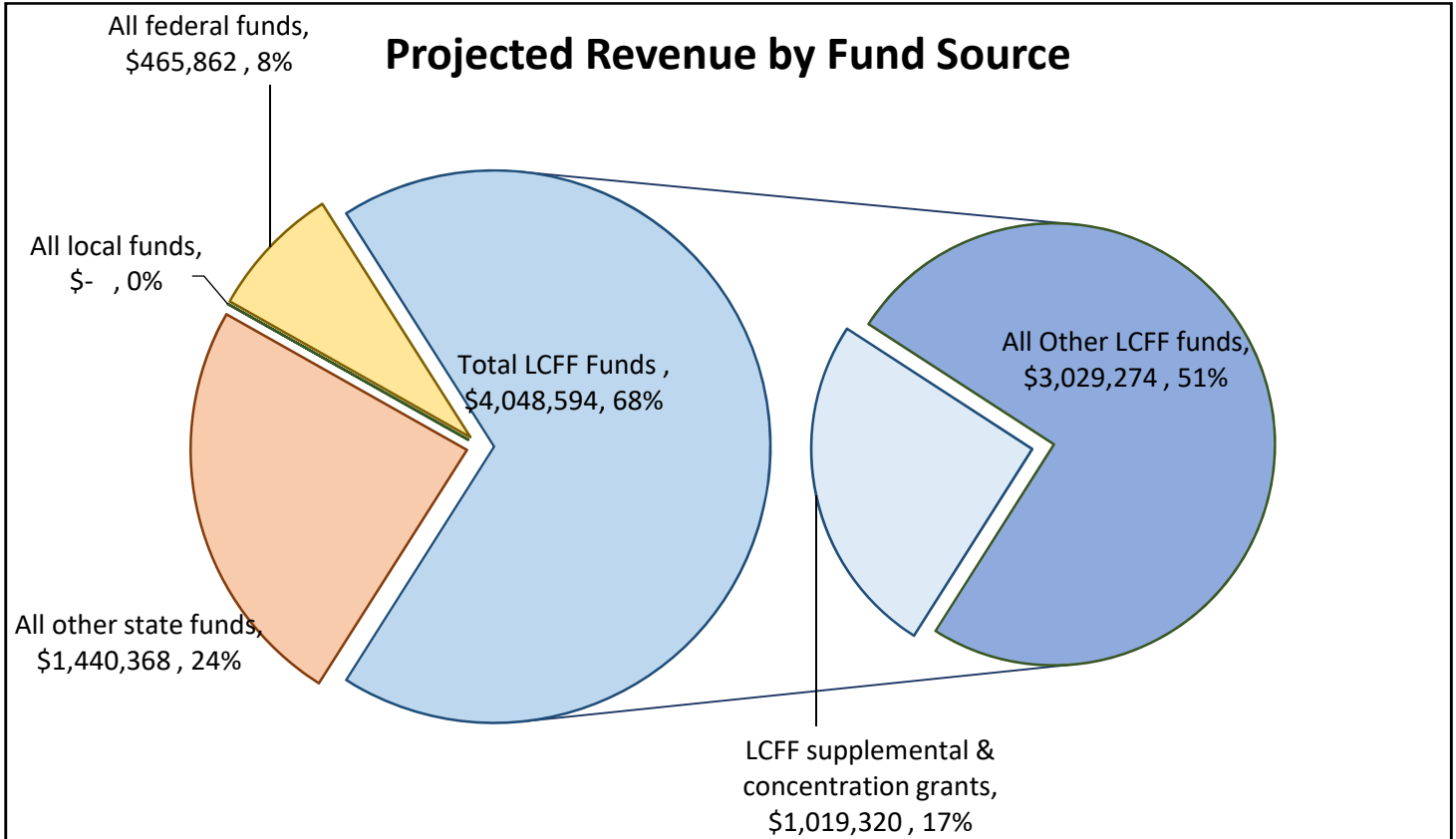
School Year: 2023-24

LEA contact information: Jerome Greening; 323.780.0076; jerome@puente.org

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

Budget Overview for the 2023-24 School Year

Projected Revenue by Fund Source

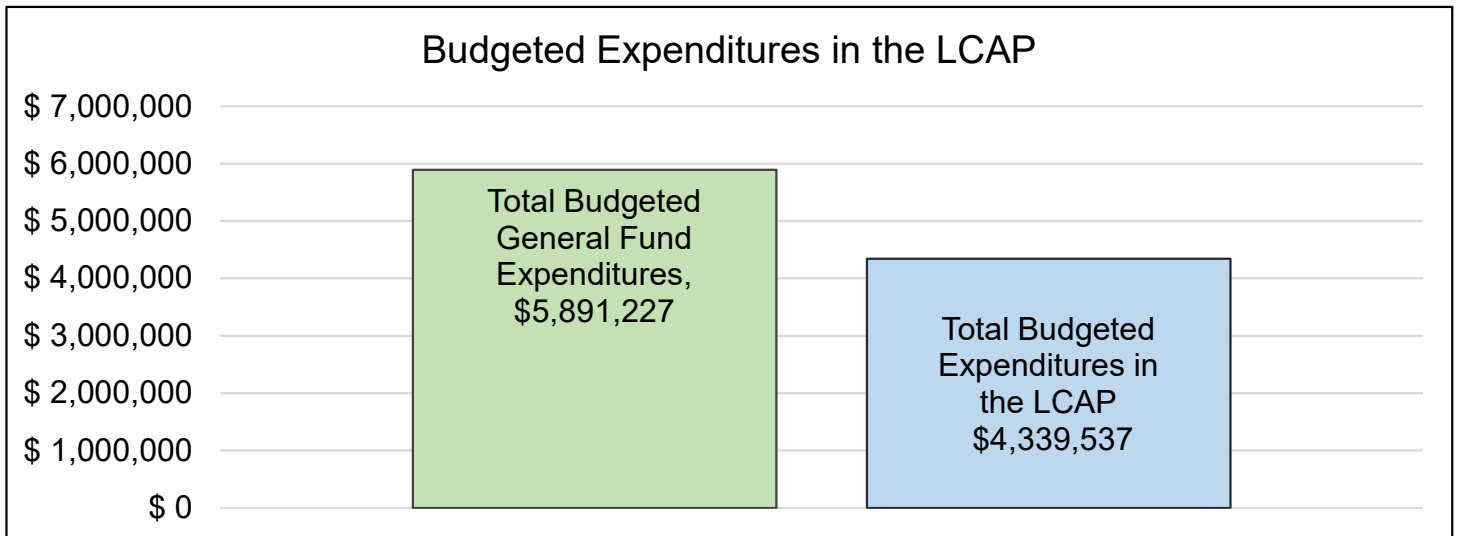


This chart shows the total general purpose revenue Puente Charter expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Puente Charter is \$5,954,824.00, of which \$4,048,594.00 is Local Control Funding Formula (LCFF), \$1,440,368.00 is other state funds, \$0.00 is local funds, and \$465,862.00 is federal funds. Of the \$4,048,594.00 in LCFF Funds, \$1,019,320.00 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

LCFF Budget Overview for Parents

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



This chart provides a quick summary of how much Puente Charter plans to spend for 2023-24. It shows how much of the total is tied to planned actions and services in the LCAP.

The text description of the above chart is as follows: Puente Charter plans to spend \$5,891,227.00 for the 2023-24 school year. Of that amount, \$4,339,537.00 is tied to actions/services in the LCAP and \$1,551,690.00 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

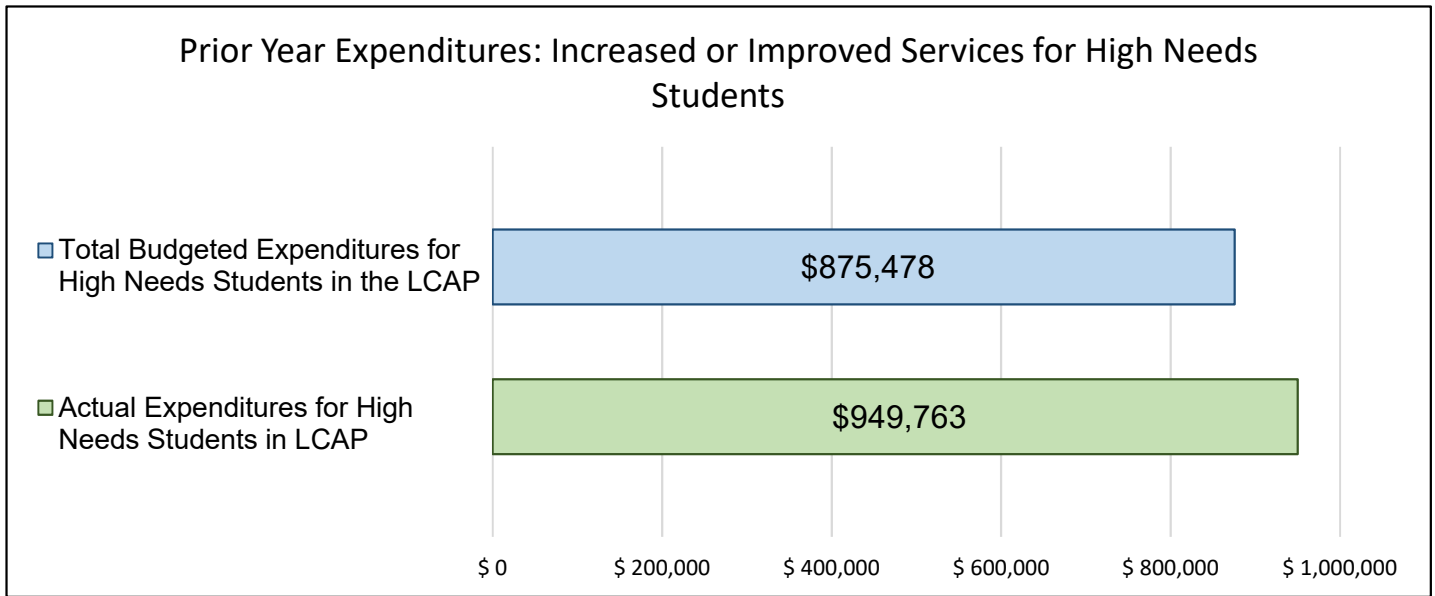
Staffing expenses related to finance and administration and some operational costs.

Increased or Improved Services for High Needs Students in the LCAP for the 2023-24 School Year

In 2023-24, Puente Charter is projecting it will receive \$1,019,320.00 based on the enrollment of foster youth, English learner, and low-income students. Puente Charter must describe how it intends to increase or improve services for high needs students in the LCAP. Puente Charter plans to spend \$1,019,320.00 towards meeting this requirement, as described in the LCAP.

LCFF Budget Overview for Parents

Update on Increased or Improved Services for High Needs Students in 2022-23



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

The text description of the above chart is as follows: In 2022-23, Puente Charter's LCAP budgeted \$875,478.00 for planned actions to increase or improve services for high needs students. Puente Charter actually spent \$949,763.00 for actions to increase or improve services for high needs students in 2022-23.

Local Control and Accountability Plan

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

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Puente Charter School	Jerome Greening, CEO	jerome@puente.org (323) 7880-0076

Plan Summary 2023-24

General Information

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

Puente Charter School is situated within the community of Boyle Heights and East Los Angeles, serving 297 students in grades TK-5. Our current student demographics reflect 97% Hispanic, 2% White, 1% African American, 10% Students with Disabilities (SWD), 29% English Learners (EL), 1% Foster Youth, and 82% Socioeconomically Disadvantaged.

Puente provides all students with academically challenging curriculum that supports the intellectual, social, and emotional growth of each child. Our school is committed to achieving academic excellence by combining the Common Core state standards with project-based learning that promotes creative exploration, digital literacy, and problem-solving skills to help students develop a life-long love of learning.

Puente Charter Elementary was founded in 2002 by dedicated educators and parents wishing for a high achieving school in the community. Puente Charter Elementary has the distinction of being the first charter school located in Boyle Heights. Combined with Puente Learning Center, founded in 1985, purposeful partnerships have been established with community stakeholders and leaders to connect children and families to learning opportunities and resources, building bridges to education for students to lead and succeed.

As we reflect on the opening of our charter school over 20 years ago, it is incredible to see how far we have come. Established from our community’s request to continue supporting a strong early learning foundation from our Puente Preschool Readiness program, Puente Charter School offered kindergarten-grade services to the Boyle Heights community from 2002-2017, leaving families with limited high-quality options for their children's education beyond those early years. With the continued support from our community, and a successful material revision to our charter, Puente began the slow-growth expansion to add grades 1 through 5 and fulfill the pledge to support our students and families with high-performing school services, including meaningfully addressing the needs of our English Learners. The 2022-23 school year reflects our growth of serving TK-5 and is our greatest accomplishment this year.


Our parent and family community have expressed their overwhelming satisfaction with the school’s growth and our focus on maintaining the high-quality standards, the important home-to-school connection and relationship. Our commitment to support English learners is reflected in our “very high” performance on the English Learner Progress Indicator (ELPI) on the 2022 CA School Dashboard where 75.4% of English Learners advanced at least one level on the ELPAC summative assessment. We are motivated to build on our successes and provide an

exceptional education for all of our students, from TK to 5th grade, and continue demonstrating through our data outcomes that we are promoting equity in education.

Reflections: Successes

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

The following chart reflects Puente Charter School’s 2022 CA School Dashboard performance on the five indicators.



Dashboard Student Group Report

Puente Charter

The Fall 2022 Dashboard includes Status only; it is anticipated that Status and Change will return for the Fall 2023 Dashboard

Key

Current Status

Number of Total Students

26.8 DFS

959 Students

Dashboard Indicator

Status

Level

Status Level


← Lowest Status

→ Highest Status

Lowest Status Cutoffs

Indicator	TK-12	Elementary	High School
English Learner Progress	34.9% or lower	34.9% or lower	34.9% or lower
Academic - ELA	-70.1 DFS or lower	-70.1 DFS or lower	-45.1 DFS or lower
Academic - Math	-95.1 DFS or lower	-95.1 DFS or lower	-155.1 DFS or lower
Suspension	8.1% or greater	6.1% or greater	9.1% or greater
Chronic Absenteeism (TK-8)	20.1% or greater	20.1% or greater	N/A
Graduation Rate	67.9% or lower	N/A	67.9% or lower
CCI (Not available for 2022)	N/A	N/A	N/A

Report designed by:



Student Group	Pupil Achievement						School Climate		Pupil Engagement			
	ELPI		ELA (Academic)		Math (Academic)		Suspension Rate		Chronic Absenteeism		Graduation Rate	
	Status	Level	Status	Level	Status	Level	Status	Level	Status	Level	Status	Level
All Students	75.4% n=61		1.1 dfs n=87		-2.4 dfs n=85		0% n=251		21.2% n=245			
Student Program												
English Learner	75.4% n=61		-4.2 dfs n=54		-0.8 dfs n=52		0% n=92		20% n=90			
Foster Youth							n=2		n=2			
Homeless Youth												
Socioeconomically Disadvantaged			-5.2 dfs n=74		-6.8 dfs n=72		0% n=215		22.7% n=211			
Students with Disabilities			12.7 dfs n=12		-26.3 dfs n=12		0% n=26		30.8% n=26			
Student Race/Ethnicity												
Black/African American			n=1		n=1		n=5		n=5			
American Indian or Alaska Native												
Asian												
Filipino												
Hispanic			-3 dfs n=85		-6.1 dfs n=83		0% n=243		19.8% n=237			
Pacific Islander												
White			n=1		n=1		n=3		n=3			
Multiple Races/Two or More												

Puente Charter School successes in the 2022 CA School Dashboard include:

- “Very high” performance level for the English Learner Progress Indicator (ELPI) of 75.4%.
- “Very high” performance level for the Suspension Rate indicator: 0% Suspension Rate
- “Medium” performance level for the English Language Arts (ELA) Academic Indicator: 1.1 distance from standard (dfs)
- “Medium” performance level for the Math Academic Indicator: -2.4 dfs
- All Local Indicators received a “standard met” on the Dashboard.

- **ELA Academic Indicator:** Puente Charter School earned a Status level of “Medium” for All Students which is higher compared to the state’s Status level of Low. The report shows an average Distance from Standard (DFS) of 1.1 in ELA for the All Students group, which is above the State average (DFS) of -12.2. Puente Charter School has three (3) numerically significant student groups (Hispanic, English Learners, and Socioeconomically Disadvantaged). The three numerically significant student groups (Hispanic, English Learners, and Socioeconomically Disadvantaged) have a DFS above the State’s average DFS for that student group.

Improving student outcomes in ELA requires a multi-faceted approach that addresses the needs of all our students, particularly those who are traditionally underserved. This year we implemented and improved on our evidence-based strategies, such as (1) differentiated instruction, (2) improvements with technology integration, (3) data-driven instruction, (4) high-quality professional development, and (5) family and community engagement.

Our teachers provide ***differentiated instruction*** to students based on their unique learning needs, ensuring progress for all students in ELA. This approach is particularly effective for student groups with diverse language backgrounds or learning needs. To further support struggling students, including ELL and socioeconomically disadvantaged students, an Instructional/Intervention Coach was added to the staff roster this academic year to provide targeted one-on-one interventions in ELA and math.

To enhance teaching practices and promote collaboration, peer observations were introduced for English Language Development (ELD). This approach includes sharing resources in support of the reading, writing, listening, and speaking portions of the ELPAC assessment, as well as best practices amongst teachers.

Another component to our growth includes ***technology Integration:*** Using technology to support literacy instruction provides students with engaging and interactive learning experiences. Puente Charter School has implemented a 1:1 student/laptop ratio. This year we add IXL Intervention Program - that provides immediate feedback and personalized instruction that has been particularly effective for students who are struggling with ELA, as well as math. Technology integration allows teachers the opportunity to tailor instruction to individual students' learning needs and preferences. It also allows teachers to track student progress more effectively and identify areas where additional support may be needed therefore helping to close the achievement gap.

Puente Charter School has implemented **Data-Driven Instruction**: This continues to be part of our practice where we regularly analyze student data to identify areas of strength and areas that need improvement in ELA and ensure the data is used to inform instruction. This practice helps our teachers calibrate their instruction to meet students' needs of all of our learners on an ongoing basis while ensuring a culturally relevant curriculum. This year we scaled up our “data dive” practices with several designated Professional development sessions focusing on data analysis and ensuring data-driven classroom instruction for continued individual student achievement.

Providing **high-quality Professional Development** is key to our success. Every Friday, the entire instructional team (teachers, paraprofessionals and admin) participate in professional development opportunities that focus on evidence-based literacy strategies, culturally responsive teaching practices, and strategies for meeting the needs of diverse learners that have had a positive impact on student outcomes. Classes are led by the principal, vice principal, instructional coach, SPED Director, or consultants with the expertise needed for a particular subject. We have meaningful discussions addressing areas where we can ensure that our student's needs are being met. We are also proud that our MTSS capacity-building now includes all our instructional and leadership team members participating in the California MTSS Pathway Certification, as a recipient of the MTSS SUMS grant.

Establishing partnerships with **families and community** members has helped create a supportive learning environment that reinforces the importance of literacy and provides additional opportunities for students to practice their ELA skills. This approach can be particularly effective for students who may not have access to books or other literacy resources at home. We have partnerships with Reading Is Fundamental where students have seasonal book events and book distributions, as well as PUENTE Learning Center where we have had guest speakers join our parent meetings on how to prepare students for college. We also have a partnership with The Neighborhood Music School where students have a variety of music classes, one of which is choral, allowing students to learn lyrics, the history of music, and sing with their peers.

An analysis of the NWEA Fall to winter assessments provide evidence that the multitude of supports we offer have resulted in accelerating learning and narrowing achievement gaps among our English learners, Hispanic, and socio-economically disadvantaged student groups.

- **Math Academic Indicator**: Puente Charter School continues to improve on the practice of implementing Cognitively Guided Instruction (CGI) for Math, a research-based approach to teaching mathematics that emphasizes understanding and problem-solving skills. CGI math supports differentiated instruction where it is highly individualized, allowing teachers to provide support or challenge students based on their individual needs while ensuring that all students are making progress. There is a need to revisit foundational skills for all grade levels.

CGI math also helps promote student engagement, as it is designed to be highly interactive for students. It encourages students to work collaboratively, to think creatively, and to explore mathematical concepts in a variety of ways. This encourages students develop a love for math and a willingness to tackle challenging problems. Students learn to work in collaborative groups which helps our EL students engage and communicate with other students.

CGI math emphasizes problem-solving as a central component of mathematics where students are encouraged to use a variety of strategies to solve problems and to explain their thinking to others. This can be especially helpful with our English Learners that may have the mathematical skill set but lack the language skills to solve. Students are encouraged to explore and explain their thinking, which can lead to a deeper understanding of mathematical concepts.

This year we also implemented IXL Math online learning platform that provides practice problems and interactive activities for students to develop their math skills, allowing for personalized learning. IXL Math uses adaptive technology to create personalized learning experiences for each student, meeting them where they are. The program identifies areas where students need more practice and provides immediate feedback to help them improve. Lastly, IXL Math allows for progress monitoring, providing detailed reports on student progress, allowing teachers and parents to monitor student performance and identify areas where students need more support. This helps ensure that all of our students are making progress towards their learning goals.

In the most recent fall to winter - NWEA MAP math assessment overall, 92% of our students demonstrated progress in Math.

- **SUSPENSION RATE INDICATOR:** We attribute our zero percent suspension rate to a number of factors: A culture of high expectation, a culture of learning and a culture of respect schoolwide. Puente has implemented Calm classroom and will implement Second Step curriculum that helps build students social-emotional skills, nurturing positive relationships, managing emotions, and setting goals.

Reflections: Identified Need

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

Chronic Absenteeism Rate: shows that Puente Charter School has earned a Status level of “very high” for All Students which is comparable to the state’s Status level of “very high.” The CA School Dashboard shows that 21.2% of students at Puente Charter School were absent 10 percent or more of the instructional days they were enrolled as compared to the State’s at 30.0%. Puente Charter School has three (3) numerically significant student groups: Hispanic, English Learners, Socioeconomically Disadvantaged. All the numerically significant subgroups’ status level of “High” and “Very High” are lower to the respective State’s subgroup Status level.

The disrupted learning experiences over the past three years have had a significant impact on our students' attendance, particularly in the early grade levels. Extensive analysis, data, and discussions have been conducted to understand the barriers that prevent our students from attending school regularly. Through a school team approach, we have identified that the COVID-19 pandemic has been the leading factor that has led to struggles with absenteeism. In addition, several students contracted the Flu and RSV. Parents are concerned that their child may be at risk of contracting a virus or, if their child is exhibiting symptoms, they may spread the infection to other students. As a result, parents are hesitant to send their children to school due to health concerns.

To address these challenges and improve school attendance, we are partnering with families, providing engaging opportunities for students, and utilizing community partnerships to offer enriching activities. We maintain regular communication with families about attendance expectations, offer resources and support services, and involve parents and caregivers in decision-making through student attendance review meetings. These SART meetings help us support families with students who are struggling to come to class each day and collectively address the demonstrated achievement gaps in the interim assessments and promoting to the parent the need for stronger student attendance to help ensure student success. In addition, our instructional team is utilizing small group and one-on-one instruction (with the support of our paraprofessionals assigned to each classroom) to address the learning needs of our students who did not demonstrate growth. In addition, our Intervention Coach is providing direct service and also teacher coaching in support of addressing this student need.

We also hold a school-wide recognition ceremony every month to celebrate perfect attendance, where the classroom with the best overall attendance wins a traveling trophy and a pizza party. Further intentional incentives include providing monthly Family Nights, seasonal Fun Days, and Spirit Weeks. We have also returned to offering field trips and after-school clubs to motivate students to attend school regularly. Our community partners offer programs such as Girls on the Run, Puente Learning Center 5K Run, LAPD Hollenbeck Pals Soccer Clinics, Theatre of Hearts dance classes, Neighborhood Music School music lessons, and Reading Is Fundamental book events and books distribution activities.

In addition, student counseling is provided to support those students who may be struggling with social and emotional issues, offer extended learning experiences by providing an engaging summer school program and an after-school program headed by our school collaborator, Think Together.

It is our responsibility to continue to support our Hispanic learners, English Learners, Socio-Economically Disadvantaged, students and all families who need assistance improving their child's attendance to ensure success in school.

LCAP Highlights

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

Puente Charter School was the recipient of the MTSS SUMS grant that provides comprehensive MTSS professional learning for its entire staff, including coaching.

A multi-tiered system of supports (MTSS) is a proactive and preventative framework that integrates data and instruction to maximize student achievement and support students social, emotional, and behavior needs from a strengths-based perspective. MTSS offers a framework for educators to engage in data-based decision making related to program improvement, high-quality instruction and intervention, social and emotional learning, and positive behavioral supports necessary to ensure positive outcomes for the school, teachers, and students. The MTSS framework is comprised of four essential components: screening, progress monitoring, multi-level prevention system, and data-based decision making. The multi-level prevention system includes a continuum (tiers 1, 2, & 3) of integrated academic, social, emotional, and behavioral instructional and intervention supports that are evidence-based can culturally and linguistically responsive.

Puente Charter School was also the recipient of the CA Community Schools Partnership Program Planning Grant. The CA Community Schools Planning Project is to acquire the resources; engage in capacity building schoolwide; and develop partnerships with community agencies and organizations in order to create an effective and sustainable implementation plan that (1) addresses the school's local needs in relation to the four pillars of Community Schools and the CA Community Schools Framework (2) leverages existing resources and builds upon new partnerships; (3) aligns with our ongoing efforts involving Multi-tiered System of Supports (MTSS) that address the Four Key Conditions for Learning.

Highlights of Puente Charter School's LCAP align to the CA MTSS Framework and CA Community Schools Framework including the addition of a full-time counselor and Assistant Principal to provide support with school culture and student discipline; in combination with Second Step SEL Curriculum and Calming Classrooms. In addition, we are providing extensive professional learning for our educators and support staff on MTSS, strategies to support our English Learners and Students with Disabilities, in addition to Diversity, equity and Inclusion and culturally relevant instruction.

Puente Charter School developed its 2023-24 LCAP that also serves as its SPSA, and meets the educational partner consultation requirements outlined in CA EC 64001(j) and has met the following requirements per CA EC 52062(a):

- Consultation with SELPA per CA EC 52062(a)(5)
- Parent Advisory Committee (PAC): CA EC 52062(a)(1)
- English Learner PAC: CA EC 52062(a)(2)
- Providing written response to each of the committees regarding their comments

Comprehensive Support and Improvement

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

Schools Identified

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

Puente Charter School was not eligible for CSI.

Support for Identified Schools

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

Not applicable.

Monitoring and Evaluating Effectiveness

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

Not applicable.

Engaging Educational Partners

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

- Puente Charter School engaged, consulted, and collaborated with the following educational partners in the development of the 2023-24 LCAP through the following methods/venues:
- Principals/Administrators including the Executive Director were consulted during weekly Thursday Leadership meetings on the development of the 2023- LCAP. The LCAP goals and actions are reviewed on a monthly basis by the leadership team, along with our data outcomes, as a measure to track progress toward goal achievement and to analyze the effectiveness of the actions and allocation of resources.
 - Teachers were consulted during staff development meetings (Jan – May 2023) and were surveyed. The LCAP goals and actions were presented for their input in combination with local data and dashboard data; and provided input on the development of the 2023-24 LCAP.
 - Other School Personnel were consulted on 4/13/23 The LCAP goals and actions were presented for their input in combination with local data and dashboard data; and provided input on the development of the 2023-24 LCAP.
 - Students: were consulted on 1/18/23 and 5/4/23 and provided input on the development of the 2023-24 LCAP.
 - Parents were consulted on 1/18/23 and during monthly Coffee with the Principal. The LCAP goals and actions were presented for their input in combination with local data and dashboard data; and provided input on the development of the 2023-24 LCAP.
 - Parent Advisory Committee (PAC) which includes parents of Unduplicated Pupils, and parents of Students with Disabilities were consulted during quarterly meetings. The LCAP goals and actions were presented for their input in combination with local data and dashboard data; and provided input on the development of the 2023-24 LCAP.
 - ELAC/DELAC/EL-PAC was consulted on 10/19/22, 11/16/22, 12/14/22, 1/18/23, 2/15/23, 4/19/23, and on 5/24/23. The LCAP goals and actions were presented for their input in combination with local data and dashboard data; and provided input on the development of the 2023-24 LCAP.
 - SELPA (LAUSD) was consulted on May 10, 2023 and reviewed Goal 1, Action 4 “Special Education Service” and no additional feedback was provided.

Dates of Public comment period: June 8-13th

LCAP Public Hearing; LCAP Adoption; and approval of 2023-24 Budget took place on: June 14, 2023

Local Indicators were presented to the governing board on: June 14, 2023

A summary of the feedback provided by specific educational partners.

Puente Charter School consulted with its required educational partners and the following is feedback that was collected:

- Principals/Administrators feedback was the recommendation for a full-time counselor and an Assistant Principal to provide support with school culture and student discipline in alignment with the MTSS Framework and CA Community Schools Framework.
- Teachers requested to continue to staff full-time paraprofessionals and additional support with physical education. They also requested a virtual phone extension to ParentSquare (phone calls with families); a phonics program; and to continue providing electives for students.
- Other School Personnel requested to continue with the full-time campus aides and to upgrade current SIS system to support with enrollment.
- Students requested more sports equipment and more field trips.
- Parents requested parent education workshops on – Social Media challenge, and gang prevention. They also requested after-school tutoring services to address learning gaps.
- Parent Advisory Committee (PAC) which includes parents of Unduplicated Pupils, and parents of Students with Disabilities requested an expansion to the Gifted Program (GATE); and would like tutoring services to be offered to their children afterschool.
- ELAC/DELAC/EL-PAC requested parent education workshop on how to support their EL student towards reclassification.
- Community Schools Steering Committee requested building capacity to provide and address health and wellness needs for staff post pandemic and annual growth of our school (grade expansion), perhaps an onsite wellness center.
- SELPA provided no additional feedback.

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

The engagement process included the development of this LCAP as follows:

- Goal 1, Action 2: Paraprofessional to provide tier 1 academic support during the instructional day
- Goal 1, Action 2: After-school programming – tutoring services
- Goal 1, Action 3: Counselor to provide SEL support, school culture & student discipline; and FMT Therapist
- Goal 1, Action 3: Second Step SEL Programming, Calm Classroom
- Goal 1, Action 3: Assistant principal to support with school culture & discipline
- Goal 1, Action 5: Intervention Coach and Teacher supporting EL
- Goal 2, Action 5: Electives: Music & Dance
- Goal 3, Action 1: Field trips
- Goal 3, Action 3: Parent education workshops

Goals and Actions

Goal

Goal #	Description
1	Continue to implement a “whole child approach” through MTSS, addressing the academic, social-emotional, behavioral, and/or mental health needs of our students through standards-aligned culturally relevant learning.

An explanation of why the LEA has developed this goal.

MTSS capacity building has resulted in growth in student achievement data. MTSS combined with our CA Community Schools Framework will further reinforce our “whole child approach” to education to address the academic, social-emotional and/or behavioral needs of our students which impede learning.

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
CAASPP ELA Source: CDE	2020-21: 42.86% met/exceeded	2021-22: 54.95% Met or exceeded standard	2022-23: results pending		45%
CAASPP Math Source: CDE	2020-21: 28.57% met/exceeded	2021-22: 47.78% Met or exceeded standard	2022-23: results pending		40%
CA Science Test: Gr 5 Source: CDE	* Not applicable Puente served TK-3	Not applicable Puente served TK-4	2022-23: results pending		2022-23 results will serve as a baseline
% Of EL who made progress toward English Proficiency measured by ELPAC Source: CDE	2020-21: 2.94% Proficient	2021-22: 36.47% Proficient	2022-23: results pending		15%
Reclassification Rate	2019-20: 33.8%	2020-21: 12.1%	2022-23: 18.5%		15%

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24	
Source: Dataquest						
% EL with access to CCSS & ELD Standards Source: SARC	2020-21: 100%	2021-22: 100%	2022-23: 100%		100%	
Attendance Rate Source: CALPADS	2019-20: 97.2%	2020-21: 96%	2021-22: 94%		%	
Chronic absenteeism Rate. Source: Dataquest	2018-19: 16.8%	2020-21: 11.7%	2021-22 CHRONIC ABSENTEEISM		10%	
				Number		Rate
			Schoolwide	52		21.2%
			Hispanic	47		19.8%
			English Learners	18		20.0%
			SWD	8		30.8%
			SED	48		22.7%
Suspension Rate Source: Dataquest	2019-20: 0%	2020-21: 0%	2021-22: 0%		<1%	
Expulsion Rate Source: Dataquest	2019-20: 0%	2020-21: 0%	2021-22: 0%		0%	

Puente Charter School serves grades TK-5: therefore, the following metrics do not apply:

- Priority 3: % of pupils who successfully completed A-G
- Priority 3: % of pupils how successfully completed CTE Courses
- Priority 3: % of Pupils who successfully completed CTE & A-G courses
- Priority 3: % of pupils who pass AP exams with a score of 3 or higher
- Priority 3: Pupils prepared for college by EAP
- Priority 5: MS & HS Dropout Rate, HS Graduation Rate
- Priority 8: Other pupil outcomes

Actions

Action #	Title	Description	Total Funds	Contributing
1	ASSESSMENTS OF LEARNING	<p>To measure student academic performance, monitor student progress and identify learning gaps and accelerate student learning, all students will be administered the following assessments that will be used to inform instruction and identify students for academic support via the MTSS:</p> <ul style="list-style-type: none"> • NWEA MAP Reading & Math: TK-5 (3 times/year) • Running Records (TK-5): every 6-8 weeks • Fountas & Pinnell: TK-5 • Sound/Letter & Number recognition: TK/K • Interim Comprehensive Assessments: Gr 3-5 (twice per year) • State-mandated assessments: CAASPP/SBAC, ELPAC, & CAST <p>Puente will implement the 5-step data analysis protocol for reviewing, analyzing, and discussing NWEA MAP results to identify student strengths, needs, grouping, and inform instruction.</p>	\$4,185	N
2	MTSS: ACADEMIC INTERVENTIONS	<p>Puente will utilize universal screeners (NWEA MAP, F&P) to identify learning and achievement gaps, identify struggling students for academic intervention and support. As identified from an analysis of disaggregated NWEA MAP assessments, ELPAC results, and low reclassification rates, the achievement gap of our English learners and low-income students is widening. Paraprofessionals will participate in professional learning (Goal 2, Action 2) to provide Tier 1 and Tier 2 support in reading and mathematics for Unduplicated Pupils and struggling learners through small group instruction. To further accelerate learning, students will have access to:</p> <ul style="list-style-type: none"> • iXL Math • Raz Kids • Epic 	\$1,190,448	Y

Action #	Title	Description	Total Funds	Contributing
		<p>Puente will provide additional supports through its expanded learning opportunities program (ELOP) through after school programming, intersession, and summer programming.</p> <p>Puente Charter School has implemented a GATE Program to academically challenge high performing students.</p>		
3	MTSS: SEL, BEHAVIORAL, & MENTAL HEALTH NEEDS	<p>An area of concern is chronic absenteeism rates as evidenced on the CA Schools Dashboard. Our school is committed to providing and strengthening social-emotional supports through schoolwide implementation of Second Step and Calm Classroom SEL curriculum in combination with counseling services. The Counselor will lead social skills groups for students identified using our MTSS Framework. The counselor will lead SEL sessions in all classrooms, support teachers with Second Step SEL implementation; and workshops for families.</p> <p>The Vice-principal will support educators with student discipline, school culture, behavior (classroom) management, train staff on classroom structures to ensure consistency, facilitate parent/staff engagement activities and events to foster a culture of community and respect. The Counselor will provide group counseling for students.</p> <p>The Integrated Services Coordinator will coordinate services for foster youth/homeless students, connect families with resources, lead workshops with the Family & Marriage Counselor (for families) to support the SEL and mental health needs of our students. The Community Schools Coordinator will connect families to additional resources as needed.</p>	\$288,114	Y
4	SPECIAL EDUCATION SERVICES	Puente Charter School participates in Option 2 – LAUSD SELPA.	\$461,437	N

Action #	Title	Description	Total Funds	Contributing
		In order for all students to achieve proficiency in state content standards, Puente Charter School staff will continue to deliver high quality supports and services for students with disabilities as designated in their IEPs. This staffing includes teachers, school site administrators, related service providers (including all direct behavior support providers), support administrator/teachers and classified staff. Collectively, staff ensures that students with disabilities are meeting their individualized targeted goals and that Puente is systemically striving to improve special education student achievement indicators.		
5	EL/ELD SUPPORT SERVICES	<p>Puente Charter School will continue to strengthen the delivery of integrated and designated ELD to accelerate learning, mitigate further learning loss and increase EL proficiency of the English Language. The Intervention Coach will provide targeted tiered academic support for ELs, including small group instruction to improve English language acquisition, improve performance on ELPAC Summative assessment, SBAC and increase reclassification rates. The Intervention Coach will also train Paraprofessionals) on evidence-based strategies to support English learners to improve academic outcomes. An analysis of our EL identified that 95% of Students with Disabilities (SWD) are also English Learners.</p> <p>The EL Master Plan will be reviewed and revised with the input and feedback from educational partners and ELAC/DELAC.</p>	\$97,920	Y

Goal Analysis for 2022-23

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

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

No substantive differences in planned actions and/or actual implementation of these actions.

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

There were no material differences between Budgeted Expenditures and Estimated Actual Expenditures.

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

Puente Charter School has implemented a Multi-tiered System of Supports and utilizes universal screeners (action 1), to assess student needs, progress monitoring and to develop annual growth targets. Paraprofessionals (action 2) provided small group instruction and were assigned students based in their NWEA MAP results. An identified need is to strengthen both designated and integrated ELD, to increase proficiency of EL; and increase reclassification rates. Paraprofessionals and teachers participated in robust professional learning and coaching to ensure the delivery of high quality evidence-based interventions.

Our stated goal of our MTSS practices to support student achievement is being affirmed with our current 22-23 student achievement growth data, based on our interim assessments and our EL trackers, and we are also proud that our MTSS capacity-building now includes all our instructional and leadership team members participating in the California MTSS Pathway Certification, through the grant award. Our subgroup data is demonstrating indicators of strong EL reclassification for 22-23 and grade level performance for our special education students, which are priorities for our LCAP goals. In addition, we established our GATE program this year and we added the roles of Intervention Coach and Special Education Director.

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

We plan to add an Assistant Principal and full-time Counselor to provide support with school culture and student discipline in alignment with the MTSS Framework and CA Community Schools Framework. There is a need to further re-engage our students, improve attendance, reduce chronic absenteeism to improve student outcomes.

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

Goal

Goal #	Description
2	Continue to provide evidence-based professional learning opportunities for all educators, instructional support staff and administrators to build capacity, support teacher retention, to address the diverse learning needs of our students.

An explanation of why the LEA has developed this goal.
Continue to provide a robust professional development calendar in support high-performing classroom practices and teacher retention that has resulted in low attrition and high retention of our instructional team.

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24		
% Of Fully credentialed & Appropriately assigned Teachers Source: CalSAAS	2020-21: 100%	2021-22: 100%	2022-23: results pending (TAMO)		100%		
% Of students with access to Standards-aligned materials: Source: SARC	2020-21: 100%	2021-22: 100%	2022-23: 100%		100%		
Implementation of the Academic content & performance Standards – measured using (Source) CDE’s Local Indicator Priority 2	2020-21: Implementation Academic Standards		2021-22: Implementation Academic Standards		2022-23 Implementation Academic Standards	2023-24: Implementation Academic Standards	
	ELA	4	ELA	5		ELA	5
	ELD	4	ELD	4		ELD	5
	Math	4	Math	5		Math	5
	NGSS	4	NGSS	4		NGSS	4
	History	4	History	4		History	4
	Health	3	Health	3		Health	4
	PE	4	PE	4		PE	4
	VAPA	4	VAPA	4		VAPA	4
	% Of students including Unduplicated Pupils, and Students with Disabilities	2020-21: 100%	2021-22: 100%	2022-23: 100%			100%

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
(SWD) who have access to Broad Course of Study: Source: Master Schedule					

Actions

Action #	Title	Description	Total Funds	Contributing
1	CORE EDUCATIONAL PROGRAM: EDUCATORS	<p>Puente Charter School will employ a principal and 13 credentialed teachers that will teach all core subject areas: ELA, Math, Science & Social Studies, and Physical Education serving grades TK-5, as part of the school's base program.</p> <p>The academic school year includes 180 days of instruction that exceeds the CA State requirement of 175 instructional days.</p> <p>The principal and all teachers will participate in 10 days of intensive summer professional learning: 6 non-instructional days during the academic school year, and weekly professional development during the academic school year.</p>	\$1,219,142	N
2	PROFESSIONAL LEARNING	<p>To strengthen and build teacher capacity, Puente will provide 2 weeks of summer professional learning, weekly during the academic school year and 8 non-instructional days for data review, analysis, and application. An analysis of multiple types of data including feedback from educational partners has identified the following key areas of focus for professional learning:</p> <ul style="list-style-type: none"> • Diversity, Equity & Inclusion (DEI) • Culturally Relevant curriculum • Foundational skills: literacy & math • Health Standards • Non-violent crisis intervention: prevention and verbal de-escalation skills, disengagement safety techniques, physical intervention techniques 	\$103,500	N

Action #	Title	Description	Total Funds	Contributing
		<ul style="list-style-type: none"> • Behavior Intervention Plans • IDEA & FAPE • Accommodations & Modifications • Co-teaching models • Understanding and deciphering IEPs. • Differentiated Instruction: Reading and writing • Cognitively Guided Instruction (CGI) Math • Strategies to improve designated/integrated ELD (new ELD curriculum adoption) • Social-emotional learning • Science curriculum adoption • Positive Behavioral Intervention & Supports (PBIS) • Health & Safety including CPR, & active shooter <p>As the recipient of the MTSS Grant – all staff will participate in comprehensive MTSS training to further strengthen and systematize our MTSS implementation.</p> <p>The principal will provide instructional coaching for all teachers, conduct classroom observations, lead instructional labs, model lessons, feedback cycle, encourage peer observations, and facilitate professional development.</p> <p>To support teacher effectiveness and credential clearance, Puente Charter school will reimburse for teacher induction expenses (Title II funded). To support the teacher pipeline, Puente will partner with LACOE's Intern Program for teacher candidates to obtain a preliminary credential.</p>		
3	CORE CURRICULAR NEEDS	<p>The following standards aligned curriculum and consumables will be purchased:</p> <ul style="list-style-type: none"> • Go Math consumables • Wonders ELA consumables • Wonders ELD consumables 	\$23,000	N

Action #	Title	Description	Total Funds	Contributing
4	CLOSING THE DIGITAL DIVIDE	Puente Charter will implement a 1:1 student to device ratio to ensure all students have equitable access to curricular and instructional program, supplemental, and intervention web-based programs. IT Support will ensure devices are distributed and updated regularly.	\$35,366	N
5	BROAD COURSE OF STUDY	<p>Puente will provide all students with a broad course of study beyond core subjects (ELA, Math, Science, Social Studies, and PE) that include the following:</p> <ul style="list-style-type: none"> • Music: TK-5 • Dance: Gr 1-5 • Soccer: TK-1 • Art: Gr 5 	\$15,000	N

Goal Analysis for 2022-23

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

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

No substantive differences in planned actions and/or actual implementation of these actions.

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

There were no material differences between Budgeted Expenditures and Estimated Actual Expenditures.

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

Our stated goal of a robust professional development calendar in support high-performing classroom practices and teacher retention has resulted in low attrition and high retention of our instructional team.

Our teacher have implemented balanced literacy instruction which includes reading and writing workshop. Our workshops are intended to be culturally relevant. Students are engaged in various strategies to develop writing, reading, speaking, and listening skills. They include:

- Writers Workshop where students are encouraged to write in a variety of genres and styles, including narrative, expository, and persuasive writing. Teachers provide support and feedback as students develop their writing skills, focusing on elements such as organization, voice, and mechanics. At this time of the year, all of the students are engaged on age-appropriate opinion writing.
- Reader's Workshop where teachers read aloud to their students to model fluent reading and to expose them to a variety of genres and styles of writing. Interactive Read-Alouds can also be used to teach comprehension strategies, such as predicting, questioning, and summarizing.
- Shared reading: Teachers and students read together, usually using a document camera to project to all students. Shared reading helps students develop their reading fluency and comprehension skills and can also be used to introduce new vocabulary.
- Guided reading: Teachers work with small groups of students who are at similar reading levels. They provide support and guidance as students read, helping them develop their comprehension, vocabulary, and decoding skills.
- Independent reading: Students read on their own, choosing books from their extensive class libraries that are appropriate for their reading level and interests. Teachers may provide time for independent reading during class and also encourage students to increase their reading stamina.

In addition, differentiated instruction takes place, where teachers and paraprofessionals use a variety of evidence-based pedagogical strategies to address the diverse learning styles of our students. Paraprofessionals and teachers alternate between RtI Tier 1 and 2 in the classrooms. RtI Tier 3 is facilitated by the school's intervention teacher in the form of push in or pull-out services.

As part of our whole child approach instructional model, students participate in performing arts instruction through music. On Mondays and Wednesday, students participate in one hour of age-appropriate music instruction.

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

Based on findings from classroom observations, feedback from our teacher and Special Education team, additional professional development will be provided in the areas of culturally relevant teaching, DEI, foundational skills, strategies to support ELs, strengthening designated and integrated ELD (see Action 2).

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

Goal

Goal #	Description
3	Engage educational partners to design and implement strategies to engage parents/families in our school community and solicit input in decision-making that will impact student outcomes.

An explanation of why the LEA has developed this goal.

Continue to foster strong family engagement that will result in our high-performing school practices and reinforce our priority on ensuring a healthy home and school relationship.

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Student Survey: Student Perception of School Safety & Connectedness Source: Internal Survey	2020-21: Not reported - Sense of safety Not reported - School connectedness	2021-22: 97.7% Sense of safety 100% School connectedness	2022-23: 94% Sense of Safety 97% School Connectedness		>85%
Parent Survey: Sense of safety & school connectedness Source: Internal Survey	2020-21: 95% Sense of safety 80% School connectedness	2021-22: 94.5% Sense of safety 83.4% School connectedness	2022-23: 99% Sense of Safety 92% School Connectedness		>85%
Teacher/staff Survey: Sense of safety & school connectedness Source: Internal Survey	2020-21: 100% Sense of safety 95% School connectedness	2021-22: 100% Sense of safety 96% School connectedness	2022-23: 100% Sense of Safety 100% School Connectedness		>85%
Parent Input in Decision-making including UP & SWD:	2020-21: CDE's Self-reflection Tool (Questions 5-8)	2021-22: CDE's Self-reflection Tool (Questions 5-8)	2022-23: CDE's Self-reflection Tool (Questions 5-8)		Overall Ranking 4+

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
As measured by (Source) CDE's Priority 3: Self-reflection Tool	5. 4 6. 4 7. 4 8. 4	5. 5 6. 5 7. 5 8. 5	5. 5 6. 4 7. 5 8. 5		
Parent Participation in Programs for Unduplicated Pupils & SWD: As measured by (Source) CDE's Priority 3: Self-reflection Tool	2020-21: CDE's Self-reflection Tool (Questions 1-4) 1. 4 2. 4 3. 4 4. 4	2021-22: CDE's Self-reflection Tool (Questions 1-4) 1. 5 2. 5 3. 5 4. 4	2022-23: CDE's Self-reflection Tool (Questions 1-4) 1. 5 2. 5 3. 5 4. 5		Overall Ranking 4+
Facilities in “good” repair as measured by FIT (source)	2020-21: Exemplary	2021-22: Exemplary	2022-23: Exemplary		Good

Actions

Action #	Title	Description	Total Funds	Contributing
1	PROMOTING A POSITIVE SCHOOL CLIMATE/HEALTH & SAFETY	<p>Promoting a positive school climate is essential to providing a conducive learning environment that is welcoming for students and families. Puente will design and implement a Bullying Prevention Plan that will be incorporated in the comprehensive school safety plan. The School Safety Plan will be reviewed and revised with input from our educational partners. Security guards and campus aides will provide additional supervision to promote a safe learning environment, as requested from feedback of our educational partners.</p> <p>To promote student engagement and a positive school climate, Puente Charter School will host anti-bullying assemblies, monthly student recognition ceremonies and will administer school climate surveys that will be reviewed and analyzed to assess areas of growth. Students will</p>	\$250,666	N

Action #	Title	Description	Total Funds	Contributing
		<p>participate in student-led conferences where students will demonstrate responsibility for their academic performance by providing a review of their work to their parents and teacher. In addition, students will participate in extended learning experiences through field trips aligned to core content providing 'real and relevant learning experiences.'</p> <p>Our school has partnered with the UCLA Eye Institute and Comprehensive Therapy Associates to conduct health screenings for our students. Puente participates in the universal meals program schoolwide.</p>		
2	PARENT INPUT IN DECISION-MAKING	<p>At Puente Charter School's parent input in decision-making will take place through the following:</p> <ul style="list-style-type: none"> • English Language Advisory Committee (ELAC), DELAC, & EL Parent Advisory Committee (EL-PAC) CA EC 52062(a)(2) • Parent Advisory Committee (PAC) per CA EC 52062(a)(1) • Parent Advisory Council • CCSPP Steering Committee 	\$7,000	N
3	PARENT ENGAGEMENT & PARTICIPATION	<p>Prior to the start of the school year, teachers will meet with each parent individually virtually via zoom, as the introductory meeting to welcome families to the school, communicate expectations, build positive relationships, inform families of school resources, and identify family/student needs.</p> <p>Puente Charter School will continue to provide numerous opportunities for parents (including those of Unduplicated Pupils and Students with Disabilities) to participate in their child's education and engage in schoolwide activities and events.</p> <ul style="list-style-type: none"> • Monthly Coffee with the Principal • Integrated Services Workshops: College/career readiness, counseling services, Health & Wellness, Nutrition, Immigration Rights, Tenant Rights, social media • Schoolwide events: Family Nights, Literacy Night, Meet & Greet, Monthly recognition ceremonies 	\$207,759	N

Action #	Title	Description	Total Funds	Contributing
		<p>The Operations Coordinator will communicate and conduct parent outreach, provide interpreter services, issue the monthly newsletter, monitor ParentSquare, and calendar of events. Parents will have access to Infinite Campus Parent Portal where they can view their child's academic progress, attendance and communicate with staff.</p> <p>All correspondence sent to families/guardians will be provided in English and translated to Spanish, as identified by our (primary) language survey and the "15% and above translation needs" criteria. Interpreter services are available for all parent events and upon request.</p>		
4	MAINTAINING A SAFE & CLEAN FACILITY	Puente Charter School strives to provide all students and staff with a safe and clean school facility site and adhere to all state and local county health department, Annually, Puente Charter School completes the Facility Inspection Tool (FIT) report, which is reported on the SARC, and LCAP, and Local Indicators Report (CA School Dashboard), and will address any issues/findings.	\$436,000	N

Goal Analysis for 2022-23

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

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

No substantive differences in planned actions and/or actual implementation of these actions.

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

There were no material differences between Budgeted Expenditures and Estimated Actual Expenditures.

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

These actions are driving positive school culture and, again, we are seeing the high-performing student achievement data with our interim assessments. In addition, another intentional outcome for this goal is parent and family satisfaction with our school services, and this is being confirmed with our survey results and the feedback from our family community during our ELAC meetings, Advisory Committee meetings, Coffee with the Principal/LCAP meetings and the 100% attendance for parent conferences and school events and ongoing communication/feedback on our family communication tool, Parent Square.

Our stated goal of strong family engagement is demonstrated through many of the outcomes from ensuring our high-performing school practices and reinforce our priority on ensuring a healthy home and school relationship. Our data indicates that our parent/family community is motivated by our performance outcomes (data comes from the above-mentioned survey feedback; attendance at our meetings; and the school's FIT score of 97%) and fully participate as partners in their child's education. We have developed community school components to continue strengthening family engagement, knowing that family stability leads to stronger student achievement. We conduct monthly workshops on topics that assist our families with financial literacy; housing rights; immigration rights; and health and wellness, including hosting a health fair. Addressing these "pillars" for family success has been received well by our family community and is included in our LCAP goal for student achievement. Our continued work with family engagement in support of our LCAP goal includes working with individual families whose children are in the status of chronic absenteeism. This family engagement component is linked to the pandemic health matters.

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

Leadership team will expand the areas of focus for parent education workshops based on feedback from parents (See action 3). In addition, a Community Schools Steering Committee will be formed as Puente designs its Community School with the input of its educational partners, in alignment with the CA Community Schools Framework and MTSS framework

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

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students for 2023-24

Projected LCFF Supplemental and/or Concentration Grants	Projected Additional LCFF Concentration Grant (15 percent)
\$1,019,320	\$116,039

Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
33.65%	0%	\$0	33.65%

The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.

Required Descriptions

For each action being provided to an entire school, or across the entire school district or county office of education (COE), an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

PUENTE Charter School conducted its annual comprehensive needs assessment using multiple forms of data (internal and external), in addition to input and feedback provided from educational partners, to make an informed decision on the needs of Unduplicated Pupils.

Consistent with the requirements of 5 CCR Section 15496(b), PUENTE Charter School has identified increased services that are contributing for Unduplicated Pupils; and are principally directed towards and effective in meeting the academic, social-emotional, behavioral, and mental health needs of Unduplicated Pupils that will be provided on a schoolwide basis include:

- Goal 1, Action 2: Puente will utilize universal screeners (NWEA MAP, F&P) to identify learning and achievement gaps, identify struggling students for academic intervention and support. As identified from an analysis of disaggregated NWEA MAP assessments, ELPAC results, and low reclassification rates, the achievement gap of our English learners and low-income students is widening. Paraprofessionals will participate in professional learning (Goal 2, Action 2) to provide Tier 1 and Tier 2 support in reading and mathematics for Unduplicated Pupils and struggling learners through small group instruction. Students will also utilize supplemental evidence-based intervention programs such as iXL (ELA, Math & Science); and EPIC) to further close achievement gaps and accelerate learning.
- Goal 1, Action 3: An area of concern is chronic absenteeism rates as evidenced on the CA Schools Dashboard. Our school is committed to providing and strengthening social-emotional supports through schoolwide implementation of Second Step and Calm Classroom SEL curriculum in combination with counseling services. The Counselor will lead social skills groups for students identified using our MTSS Framework. The

counselor will lead SEL sessions in all classrooms, support teachers with Second Step SEL implementation; and workshops for families. The Counselor will provide group counseling for students.

A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.

The following LCAP Goal and Action is consistent with the requirements of 5 CCR Section 15496 and will be provided on a limited basis to English learners and meets the required proportional increase in services:

- Goal 1, Action 5: Puente Charter School will continue to strengthen the delivery of integrated and designated ELD to accelerate learning, mitigate further learning loss and increase EL proficiency of the English Language. The Intervention Coach will provide targeted tiered academic support for ELs, including small group instruction to improve English language acquisition, improve performance on ELPAC Summative assessment, SBAC and increase reclassification rates. The Intervention Coach will also train Paraprofessionals on evidence-based strategies to support English learners to improve academic outcomes. An analysis of our EL identified that 95% of Students with Disabilities (SWD) are also English Learners.

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

PUENTE Charter School will use the additional 15% Concentration grant add-on funds to hire The Vice-principal will support educators with student discipline, school culture, behavior (classroom) management, train staff on classroom structures to ensure consistency, facilitate parent/staff engagement activities and events to foster a culture of community and respect. (Goal 1, Action 3)

Staff-to-student ratios by type of school and concentration of unduplicated students	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students	Not applicable to charter schools	Not applicable to charter schools

Staff-to-student ratios by type of school and concentration of unduplicated students	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of certificated staff providing direct services to students	Not applicable to charter schools	Not applicable to charter schools

2022-23 Annual Update Table

Totals:	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Actual Expenditures (Total Funds)
Totals:	\$ 3,703,428.00	\$ 4,571,751.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	1	Assessments of Learning	No	\$ 5,000	\$ 6,750
1	2	MTSS: Academic Interventions	Yes	\$ 729,378	\$ 918,847
1	3	MTSS: SEL, Behavioral, & Mental Health Needs	Yes	\$ 249,613	\$ 310,656
1	4	Special Education Services	No	\$ 350,007	\$ 613,007
1	5	EL/ELD Support Services	No	\$ 87,800	\$ 86,315
2	1	Core Educatioal Program: Educators	No	\$ 1,281,000	\$ 1,420,148
2	2	Professional Learning	No	\$ 59,500	\$ 56,500
2	3	Core Curricular Needs	No	\$ 40,000	\$ 68,400
2	4	Closing the Digital Divide	No	\$ 55,330	\$ 78,330
2	5	Broad Course of Study	No	\$ 27,000	\$ 27,000
3	1	Promoting a Positive School Cliamte/Health & Safety	No	\$ 317,000	\$ 402,126
3	2	Parent Input In decision-making	No	\$ -	\$ -
3	3	Parent Engagement & Participation	No	\$ 74,800	\$ 156,672
3	4	Maintaining a Safe & Clean Facility	No	\$ 427,000	\$ 427,000

2022-23 Contributing Actions Annual Update Table

6. Estimated Actual LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Actual Percentage of Improved Services (%)	Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)
\$ 949,763	\$ 875,478	\$ 964,949	\$ (89,471)	0.00%	0.00%	0.00% - No Difference

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services (Input Percentage)
1	2	MTSS: Academic Interventions	Yes	\$ 638,378	\$ 679,449.00	0.00%	0.00%
1	3	MTSS: SEL, Behavioral, & Mental Health Needs	Yes	\$ 237,100	\$ 285,500.00	0.00%	0.00%

2022-23 LCFF Carryover Table

9. Estimated Actual LCFF Base Grant (Input Dollar Amount)	6. Estimated Actual LCFF Supplemental and/or Concentration Grants	LCFF Carryover — Percentage (Percentage from Prior Year)	10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	8. Total Estimated Actual Percentage of Improved Services (%)	11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9)	13. LCFF Carryover — Percentage (12 divided by 9)
\$ 2,712,916	\$ 949,763	0.00%	35.01%	\$ 964,949	0.00%	35.57%	\$0.00 - No Carryover	0.00% - No Carryover

2023-24 Total Planned Expenditures Table

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	\$ 3,167,398	\$ 726,816	\$ -	\$ 445,323	4,339,537	\$ 3,087,627	\$ 1,251,910

Goal #	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
1	1	Assessments of Learning	All	\$ 4,185	\$ -	\$ -	\$ -	\$ 4,185
1	2	MTSS: Academic Interventions	All	\$ 703,466	\$ 426,982	\$ -	\$ 60,000	\$ 1,190,448
1	3	MTSS: SEL, Behavioral, & Mental Health Needs	All	\$ 217,934	\$ 20,180	\$ -	\$ 50,000	\$ 288,114
1	4	Special Education Services	Special Education	\$ 147,752	\$ -	\$ -	\$ 313,685	\$ 461,437
1	5	EL/ELD Support Services	English Learners	\$ 97,920	\$ -	\$ -	\$ -	\$ 97,920
2	1	Core Educational Program: Educators	All	\$ 1,219,142	\$ -	\$ -	\$ -	\$ 1,219,142
2	2	Professional Learning	All	\$ 79,662	\$ 12,500	\$ -	\$ 11,338	\$ 103,500
2	3	Core Curricular Needs	All	\$ 23,000	\$ -	\$ -	\$ -	\$ 23,000
2	4	Closing the Digital Divide	All	\$ 25,066	\$ -	\$ -	\$ 10,300	\$ 35,366
2	5	Broad Course of Study	All	\$ -	\$ 15,000	\$ -	\$ -	\$ 15,000
3	1	Promoting a Positive School Climate/Health & Safety	All	\$ 196,696	\$ 53,970	\$ -	\$ -	\$ 250,666
3	2	Parent Input in Decision-making	All	\$ -	\$ 7,000	\$ -	\$ -	\$ 7,000
3	3	Parent Engagement & Participation	All	\$ 67,385	\$ 140,374	\$ -	\$ -	\$ 207,759
3	4	Maintaining a Safe & Clean Facility	All	\$ 385,190	\$ 50,810	\$ -	\$ -	\$ 436,000

2023-24 Contributing Actions Table

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)	Totals by Type	Total LCFF Funds
\$ 3,029,274	\$ 1,019,320	33.65%	0.00%	33.65%	\$ 1,019,320	0.00%	33.65%	Total:	\$ 1,019,320
								LEA-wide Total:	\$ -
								Limited Total:	\$ -
								Schoolwide Total:	\$ 1,019,320

Goal #	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
1	2	MTSS: Academic Interventions	Yes	Schoolwide	All	PUENTE	\$ 703,466	0.00%
1	3	MTSS: SEL, Behavioral, & Mental Health N	Yes	Schoolwide	All	PUENTE	\$ 217,934	0.00%
1	5	EL/ELD Support Services	Yes	Schoolwide	English Learners	PUENTE	\$ 97,920	0.00%

Instructions

[Plan Summary](#)

[Engaging Educational Partners](#)

[Goals and Actions](#)

[Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students](#)

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

Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning (California *Education Code* [EC] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.
- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (EC Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.
- **Accountability and Compliance:** The LCAP serves an important accountability function because aspects of the LCAP template require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:
 - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (EC Section 52064[b][4-6]).

- Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (*EC* sections 52064[b][1] and [2]).
- Annually reviewing and updating the LCAP to reflect progress toward the goals (*EC* Section 52064[b][7]).

The LCAP template, like each LEA’s final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which should: (a) reflect comprehensive strategic planning (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in *EC* sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity’s budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2021–22, 2022–23, and 2023–24 school years reflects statutory changes made through Assembly Bill 1840 (Committee on Budget), Chapter 243, Statutes of 2018. These statutory changes enhance transparency regarding expenditures on actions included in the LCAP, including actions that contribute to meeting the requirement to increase or improve services for foster youth, English learners, and low-income students, and to streamline the information presented within the LCAP to make adopted LCAPs more accessible for educational partners and the public.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA’s diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

Given present performance across the state priorities and on indicators in the California School Dashboard (Dashboard), how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions that the LEA believes, based on input gathered from educational partners, research, and experience, will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP, but may include information about effective practices when developing the LCAP and completing the LCAP itself. Additionally, information is included at the beginning of each section emphasizing the purpose that each section serves.

Plan Summary

Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to provide a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included in the subsequent sections of the LCAP.

Requirements and Instructions

General Information – Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA. For example, information about an LEA in terms of geography, enrollment, or employment, the number and size of specific schools, recent community challenges, and other such information as an LEA wishes to include can enable a reader to more fully understand an LEA's LCAP.

Reflections: Successes – Based on a review of performance on the state indicators and local performance indicators included in the Dashboard, progress toward LCAP goals, local self-assessment tools, input from educational partners, and any other information, what progress is the LEA most proud of and how does the LEA plan to maintain or build upon that success? This may include identifying specific examples of how past increases or improvements in services for foster youth, English learners, and low-income students have led to improved performance for these students.

Reflections: Identified Need – Referring to the Dashboard, identify: (a) any state indicator for which overall performance was in the “Red” or “Orange” performance category or any local indicator where the LEA received a “Not Met” or “Not Met for Two or More Years” rating AND (b) any state indicator for which performance for any student group was two or more performance levels below the “all student” performance. What steps is the LEA planning to take to address these areas of low performance and performance gaps? An LEA that is required to include a goal to address one or more consistently low-performing student groups or low-performing schools must identify that it is required to include this goal and must also identify the applicable student group(s) and/or school(s). Other needs may be identified using locally collected data including data collected to inform the self-reflection tools and reporting local indicators on the Dashboard.

LCAP Highlights – Identify and briefly summarize the key features of this year's LCAP.

Comprehensive Support and Improvement – An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

- **Schools Identified:** Identify the schools within the LEA that have been identified for CSI.
- **Support for Identified Schools:** Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.

- **Monitoring and Evaluating Effectiveness:** Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

Engaging Educational Partners

Purpose

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, accountability, and improvement across the state priorities and locally identified priorities (*EC* Section 52064[e][1]). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

Statute and regulations specify the educational partners that school districts and COEs must consult when developing the LCAP: teachers, principals, administrators, other school personnel, local bargaining units of the LEA, parents, and students. Before adopting the LCAP, school districts and COEs must share it with the Parent Advisory Committee and, if applicable, to its English Learner Parent Advisory Committee. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

Statute requires charter schools to consult with teachers, principals, administrators, other school personnel, parents, and students in developing the LCAP. The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals and actions.

Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the following web page of the CDE's website: <https://www.cde.ca.gov/re/lc/>.

Requirements and Instructions

Below is an excerpt from the 2018–19 *Guide for Annual Audits of K–12 Local Education Agencies and State Compliance Reporting*, which is provided to highlight the legal requirements for engagement of educational partners in the LCAP development process:

Local Control and Accountability Plan:

For county offices of education and school districts only, verify the LEA:

- a) Presented the local control and accountability plan to the parent advisory committee in accordance with Education Code section 52062(a)(1) or 52068(a)(1), as appropriate.
- b) If applicable, presented the local control and accountability plan to the English learner parent advisory committee, in accordance with Education Code section 52062(a)(2) or 52068(a)(2), as appropriate.
- c) Notified members of the public of the opportunity to submit comments regarding specific actions and expenditures proposed to be included in the local control and accountability plan in accordance with Education Code section 52062(a)(3) or 52068(a)(3), as appropriate.
- d) Held at least one public hearing in accordance with Education Code section 52062(b)(1) or 52068(b)(1), as appropriate.
- e) Adopted the local control and accountability plan in a public meeting in accordance with Education Code section 52062(b)(2) or 52068(b)(2), as appropriate.

Prompt 1: “A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP.”

Describe the engagement process used by the LEA to involve educational partners in the development of the LCAP, including, at a minimum, describing how the LEA met its obligation to consult with all statutorily required educational partners as applicable to the type of LEA. A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA’s philosophical approach to engaging its educational partners.

Prompt 2: “A summary of the feedback provided by specific educational partners.”

Describe and summarize the feedback provided by specific educational partners. A sufficient response to this prompt will indicate ideas, trends, or inputs that emerged from an analysis of the feedback received from educational partners.

Prompt 3: “A description of the aspects of the LCAP that were influenced by specific input from educational partners.”

A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. The response must describe aspects of the LCAP that were influenced by or developed in response to the educational partner feedback described in response to Prompt 2. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP. For the purposes of this prompt, “aspects” of an LCAP that may have been influenced by educational partner input can include, but are not necessarily limited to:

- Inclusion of a goal or decision to pursue a Focus Goal (as described below)
- Inclusion of metrics other than the statutorily required metrics
- Determination of the desired outcome on one or more metrics
- Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
- Inclusion of action(s) or a group of actions

- Elimination of action(s) or group of actions
- Changes to the level of proposed expenditures for one or more actions
- Inclusion of action(s) as contributing to increased or improved services for unduplicated students
- Determination of effectiveness of the specific actions to achieve the goal
- Determination of material differences in expenditures
- Determination of changes made to a goal for the ensuing LCAP year based on the annual update process
- Determination of challenges or successes in the implementation of actions

Goals and Actions

Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal should be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs should consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard in determining whether and how to prioritize its goals within the LCAP.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- **Focus Goal:** A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.
- **Broad Goal:** A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.
- **Maintenance of Progress Goal:** A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

At a minimum, the LCAP must address all LCFF priorities and associated metrics.

Focus Goal(s)

Goal Description: The description provided for a Focus Goal must be specific, measurable, and time bound. An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach. The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

Explanation of why the LEA has developed this goal: Explain why the LEA has chosen to prioritize this goal. An explanation must be based on Dashboard data or other locally collected data. LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners. LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

Broad Goal

Goal Description: Describe what the LEA plans to achieve through the actions included in the goal. The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal. The goal description organizes the actions and expected outcomes in a cohesive and consistent manner. A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

Explanation of why the LEA has developed this goal: Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

Maintenance of Progress Goal

Goal Description: Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP. Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP. The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

Explanation of why the LEA has developed this goal: Explain how the actions will sustain the progress exemplified by the related metrics.

Required Goals

In general, LEAs have flexibility in determining what goals to include in the LCAP and what those goals will address; however, beginning with the development of the 2022–23 LCAP, LEAs that meet certain criteria are required to include a specific goal in their LCAP.

Consistently low-performing student group(s) criteria: An LEA is eligible for Differentiated Assistance for three or more consecutive years based on the performance of the same student group or groups in the Dashboard. A list of the LEAs required to include a goal in the LCAP based on student group performance, and the student group(s) that lead to identification, may be found on the CDE’s Local Control Funding Formula web page at <https://www.cde.ca.gov/fg/aa/lc/>.

- **Consistently low-performing student group(s) goal requirement:** An LEA meeting the consistently low-performing student group(s) criteria must include a goal in its LCAP focused on improving the performance of the student group or groups that led to the LEA's eligibility for Differentiated Assistance. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, this student group or groups. An LEA required to address multiple student groups is not required to have a goal to address each student group; however, each student group must be specifically addressed in the goal. This requirement may not be met by combining this required goal with another goal.
- **Goal Description:** Describe the outcomes the LEA plans to achieve to address the needs of, and improve outcomes for, the student group or groups that led to the LEA's eligibility for Differentiated Assistance.
- **Explanation of why the LEA has developed this goal:** Explain why the LEA is required to develop this goal, including identifying the student group(s) that lead to the LEA being required to develop this goal, how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the student group(s), and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes identified in the goal description.

Low-performing school(s) criteria: The following criteria only applies to a school district or COE with two or more schools; it does not apply to a single-school district. A school district or COE has one or more schools that, for two consecutive years, received the two lowest performance levels on all but one of the state indicators for which the school(s) receive performance levels in the Dashboard and the performance of the "All Students" student group for the LEA is at least one performance level higher in all of those indicators. A list of the LEAs required to include a goal in the LCAP based on school performance, and the school(s) that lead to identification, may be found on the CDE's Local Control Funding Formula web page at <https://www.cde.ca.gov/fg/aa/lc/>.

- **Low-performing school(s) goal requirement:** A school district or COE meeting the low-performing school(s) criteria must include a goal in its LCAP focusing on addressing the disparities in performance between the school(s) and the LEA as a whole. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, the students enrolled at the low-performing school or schools. An LEA required to address multiple schools is not required to have a goal to address each school; however, each school must be specifically addressed in the goal. This requirement may not be met by combining this goal with another goal.
- **Goal Description:** Describe what outcomes the LEA plans to achieve to address the disparities in performance between the students enrolled at the low-performing school(s) and the students enrolled at the LEA as a whole.
- **Explanation of why the LEA has developed this goal:** Explain why the LEA is required to develop this goal, including identifying the schools(s) that lead to the LEA being required to develop this goal; how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the school(s); and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes for students enrolled at the low-performing school or schools identified in the goal description.

Measuring and Reporting Results:

For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes. LEAs are encouraged to identify metrics for specific student groups, as appropriate, including expected outcomes that would reflect narrowing of any existing performance gaps.

Include in the baseline column the most recent data associated with this metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2019 Dashboard for the baseline of a metric only if that data represents the most recent available (e.g., high school graduation rate).

Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS. Because final 2020–21 outcomes on some metrics may not be computable at the time the 2021–24 LCAP is adopted (e.g., graduation rate, suspension rate), the most recent data available may include a point in time calculation taken each year on the same date for comparability purposes.

The baseline data shall remain unchanged throughout the three-year LCAP.

Complete the table as follows:

- **Metric:** Indicate how progress is being measured using a metric.
- **Baseline:** Enter the baseline when completing the LCAP for 2021–22. As described above, the baseline is the most recent data associated with a metric. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 1 Outcome:** When completing the LCAP for 2022–23, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 2 Outcome:** When completing the LCAP for 2023–24, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 3 Outcome:** When completing the LCAP for 2024–25, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above. The 2024–25 LCAP will be the first year in the next three-year cycle. Completing this column will be part of the Annual Update for that year.
- **Desired Outcome for 2023–24:** When completing the first year of the LCAP, enter the desired outcome for the relevant metric the LEA expects to achieve by the end of the 2023–24 LCAP year.

Timeline for completing the “**Measuring and Reporting Results**” part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for Year 3 (2023–24)
Enter information in this box when completing the LCAP for 2021–22 .	Enter information in this box when completing the LCAP for 2021–22 .	Enter information in this box when completing the LCAP for 2022–23 . Leave blank until then.	Enter information in this box when completing the LCAP for 2023–24 . Leave blank until then.	Enter information in this box when completing the LCAP for 2024–25 . Leave blank until then.	Enter information in this box when completing the LCAP for 2021–22 or when adding a new metric.

The metrics may be quantitative or qualitative; but at minimum, an LEA’s LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year as applicable to the type of LEA. To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant self-reflection tool for local indicators within the Dashboard.

Actions: Enter the action number. Provide a short title for the action. This title will also appear in the action tables. Provide a description of the action. Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the summary tables. Indicate whether the action contributes to meeting the increase or improved services requirement as described in the Increased or Improved Services section using a “Y” for Yes or an “N” for No. (**Note:** for each such action offered on an LEA-wide or schoolwide basis, the LEA will need to provide additional information in the Increased or Improved Summary Section to address the requirements in *California Code of Regulations*, Title 5 [5 CCR] Section 15496(b) in the Increased or Improved Services Section of the LCAP).

Actions for English Learners: School districts, COEs, and charter schools that have a numerically significant English learner student subgroup must include specific actions in the LCAP related to, at a minimum, the language acquisition programs, as defined in *EC* Section 306, provided to students and professional development activities specific to English learners.

Actions for Foster Youth: School districts, COEs, and charter schools that have a numerically significant Foster Youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to Foster Youth students.

Goal Analysis:

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective in achieving the goal. Respond to the prompts as instructed.

- Describe the overall implementation of the actions to achieve the articulated goal. Include a discussion of relevant challenges and successes experienced with the implementation process. This must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.
- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.
- Describe the effectiveness of the specific actions to achieve the articulated goal as measured by the LEA. In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal. When responding to this prompt, LEAs may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.
- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA’s description in this section must align with the actions included in the Goals and Actions section as contributing.

Requirements and Instructions

Projected LCFF Supplemental and/or Concentration Grants: Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of low income, foster youth, and English learner students.

Projected Additional LCFF Concentration Grant (15 percent): Specify the amount of additional LCFF concentration grant add-on funding, as described in *EC* Section 42238.02, that the LEA estimates it will receive in the coming year.

Projected Percentage to Increase or Improve Services for the Coming School Year: Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 CCR Section 15496(a)(7).

LCFF Carryover — Percentage: Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

LCFF Carryover — Dollar: Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero (\$0).

Total Percentage to Increase or Improve Services for the Coming School Year: Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEAs percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 CCR Section 15496(a)(7).

Required Descriptions:

For each action being provided to an entire school, or across the entire school district or COE, an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

For each action included in the Goals and Actions section as contributing to the increased or improved services requirement for unduplicated pupils and provided on an LEA-wide or schoolwide basis, the LEA must include an explanation consistent with 5 CCR Section 15496(b). For any such actions continued into the 2021–24 LCAP from the 2017–2020 LCAP, the LEA must determine whether or not the action was effective as expected, and this determination must reflect evidence of outcome data or actual implementation to date.

Principally Directed and Effective: An LEA demonstrates how an action is principally directed towards and effective in meeting the LEA’s goals for unduplicated students when the LEA explains how:

- It considers the needs, conditions, or circumstances of its unduplicated pupils;
- The action, or aspect(s) of the action (including, for example, its design, content, methods, or location), is based on these considerations; and
- The action is intended to help achieve an expected measurable outcome of the associated goal.

As such, the response provided in this section may rely on a needs assessment of unduplicated students.

Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient. Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increase or improve services standard because enrolling students is not the same as serving students.

For example, if an LEA determines that low-income students have a significantly lower attendance rate than the attendance rate for all students, it might justify LEA-wide or schoolwide actions to address this area of need in the following way:

After assessing the needs, conditions, and circumstances of our low-income students, we learned that the attendance rate of our low-income students is 7 percent lower than the attendance rate for all students. (Needs, Conditions, Circumstances [Principally Directed])

In order to address this condition of our low-income students, we will develop and implement a new attendance program that is designed to address some of the major causes of absenteeism, including lack of reliable transportation and food, as well as a school climate that does not emphasize the importance of attendance. Goal N, Actions X, Y, and Z provide additional transportation and nutritional resources as well as a districtwide educational campaign on the benefits of high attendance rates. (Contributing Action[s])

These actions are being provided on an LEA-wide basis and we expect/hope that all students with less than a 100 percent attendance rate will benefit. However, because of the significantly lower attendance rate of low-income students, and because the actions meet needs most associated with the chronic stresses and experiences of a socio-economically disadvantaged status, we expect that the attendance rate for our low-income students will increase significantly more than the average attendance rate of all other students. (Measurable Outcomes [Effective In])

COEs and Charter Schools: Describe how actions included as contributing to meeting the increased or improved services requirement on an LEA-wide basis are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above. In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

For School Districts Only:

Actions Provided on an LEA-Wide Basis:

Unduplicated Percentage > 55 percent: For school districts with an unduplicated pupil percentage of 55 percent or more, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above.

Unduplicated Percentage < 55 percent: For school districts with an unduplicated pupil percentage of less than 55 percent, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities. Also describe how the actions **are the most effective use of the funds** to meet these goals for its unduplicated pupils. Provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Actions Provided on a Schoolwide Basis:

School Districts must identify in the description those actions being funded and provided on a schoolwide basis, and include the required description supporting the use of the funds on a schoolwide basis.

For schools with 40 percent or more enrollment of unduplicated pupils: Describe how these actions are principally directed to and effective in meeting its goals for its unduplicated pupils in the state and any local priorities.

For school districts expending funds on a schoolwide basis at a school with less than 40 percent enrollment of unduplicated pupils: Describe how these actions are principally directed to and how the actions are the most effective use of the funds to meet its goals for foster youth, English learners, and low-income students in the state and any local priorities.

A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.

Consistent with the requirements of 5 CCR Section 15496, describe how services provided for unduplicated pupils are increased or improved by at least the percentage calculated as compared to the services provided for all students in the LCAP year. To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are included in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided on an LEA-wide or schoolwide basis or provided on a limited basis to unduplicated students. A limited action is an action that only serves foster youth, English learners, and/or low-income students. This description must address how these action(s) are expected to result in the required proportional increase or improvement in services for unduplicated pupils as compared to the services the LEA provides to all students for the relevant LCAP year.

For any action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage. See the instructions for determining the Planned Percentage of Improved Services for information on calculating the Percentage of Improved Services.

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

An LEA that receives the additional concentration grant add-on described in EC Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.

Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.

An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.

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

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of full time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.
- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

Action Tables

Complete the Data Entry Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Data Entry Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. With the exception of the Data Entry Table, the word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)
- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)

- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2022–23 LCAP, 2022–23 will be the coming LCAP Year and 2021–22 will be the current LCAP Year.

Data Entry Table

The Data Entry Table may be included in the LCAP as adopted by the local governing board or governing body, but is not required to be included. In the Data Entry Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year:** Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant:** Provide the total amount of LCFF funding the LEA estimates it will receive for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 CCR Section 15496(a)(8).

See EC sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF apportionment calculations.

- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will receive on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 CCR Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.
- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover — Percentage. This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.
- **Goal #:** Enter the LCAP Goal number for the action.
- **Action #:** Enter the action's number as indicated in the LCAP Goal.

- **Action Title:** Provide a title of the action.
- **Student Group(s):** Indicate the student group or groups who will be the primary beneficiary of the action by entering “All,” or by entering a specific student group or groups.
- **Contributing to Increased or Improved Services?:** Type “Yes” if the action is included as contributing to meeting the increased or improved services; OR, type “No” if the action is **not** included as contributing to meeting the increased or improved services.
- If “Yes” is entered into the Contributing column, then complete the following columns:
 - **Scope:** The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.
 - **Unduplicated Student Group(s):** Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
 - **Location:** Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate “All Schools.” If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter “Specific Schools” or “Specific Grade Spans.” Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.
- **Time Span:** Enter “ongoing” if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter “1 Year,” or “2 Years,” or “6 Months.”
- **Total Personnel:** Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel:** This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.
- **LCFF Funds:** Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA’s total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
 - **Note:** For an action to contribute towards meeting the increased or improved services requirement it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds:** Enter the total amount of Other State Funds utilized to implement this action, if any.

- **Local Funds:** Enter the total amount of Local Funds utilized to implement this action, if any.
- **Federal Funds:** Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds:** This amount is automatically calculated based on amounts entered in the previous four columns.
- **Planned Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.
 - As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which the LEA estimates would cost \$165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Service for the action.

Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the ‘Contributing to Increased or Improved Services?’ column will need to be checked to ensure that only actions with a “Yes” are displaying. If actions with a “No” are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the “Yes” responses.

Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures:** Enter the total estimated actual expenditures to implement this action, if any.

Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the ‘Contributing to Increased or Improved Services?’ column to ensure that only actions with a “Yes” are displaying. If actions with a “No” are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the “Yes” responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- **Estimated Actual Expenditures for Contributing Actions:** Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.
- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).
 - Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been \$169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of \$169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant:** Provide the total amount of LCFF funding the LEA estimates it will receive for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 CCR Section 15496(a)(8).
- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 CCR Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

Contributing Actions Table

- 4. Total Planned Contributing Expenditures (LCFF Funds)
 - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column
- 5. Total Planned Percentage of Improved Services
 - This percentage is the total of the Planned Percentage of Improved Services column
- Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)
 - This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

Contributing Actions Annual Update Table

Pursuant to *EC* Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- 6. Estimated Actual LCFF Supplemental and Concentration Grants
 - This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- 4. Total Planned Contributing Expenditures (LCFF Funds)
 - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)
- 7. Total Estimated Actual Expenditures for Contributing Actions

- This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds)
- Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)
 - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4)
- 5. Total Planned Percentage of Improved Services (%)
 - This amount is the total of the Planned Percentage of Improved Services column
- 8. Total Estimated Actual Percentage of Improved Services (%)
 - This amount is the total of the Estimated Actual Percentage of Improved Services column
- Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)
 - This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8)

LCFF Carryover Table

- 10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)
 - This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.
- 11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)
 - This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).
- 12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)
 - If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.

- 13. LCFF Carryover — Percentage (12 divided by 9)
 - This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education
January 2022



PUENTE Charter School
Unaudited Financial Statements
As of and for the period Ended March 31, 2023
with comparative financial information for June 30, 2022

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PUENTE Charter School
Statement of Activities
July 1 through March 31, 2023
with Comparative YTD Budget

	ADA	265		265		265
		Actual		YTD Budget		Annual Budget
		3/31/2023		3/31/2023	Variance	6/30/2023
Operating revenue						
LCFF - State Aid	\$	1,569,297	38.52%	\$ 1,632,018	\$ (62,721)	\$ 2,176,024
Prop 30 - Education Protection Account		550,523	13.51%	474,892	75,631	633,190
Other Fed Income		367,532	9.02%	519,042	(151,510)	692,056
Special Ed Current Yr		222,010	5.45%	178,680	43,330	238,239
State Lottery - Charter Prop 20		15,684	0.39%	9,806	5,878	13,076
Non-Prop Lottery Education Appointment		48,728	1.20%	35,292	13,436	47,055
Other State Revenue		622,215	15.27%	293,679	328,536	391,572
District pymt in lieu of Prop Tax		665,161	16.33%	640,146	25,015	853,529
Total operating revenue	\$	4,073,468		\$ 3,783,555	\$ 289,913	\$ 5,044,741
Operating expenses and losses						
Salaries		1,968,121		1,959,131	8,990	2,589,137
Employee benefits		187,713		229,820	(42,107)	306,619
Taxes		144,997		157,154	(12,157)	207,677
Workers Compensation		30,476		46,056	(15,580)	61,410
Total personnel cost	\$	2,331,308	58.2%	\$ 2,392,161	\$ (60,853)	\$ 3,164,843
Building Lease		225,747	5.64%	225,751	(4)	301,000
Professional Services		290,179	7.25%	264,206	25,973	365,182
Special Ed Contract		284,153	7.10%	108,700	175,453	165,000
Special Ed Fair Share		152,604	3.81%	132,443	20,161	182,108
Food Service Contract		131,864	3.29%	90,693	41,171	135,000
Utilities		54,737	1.37%	49,900	4,837	67,203
Insurance		58,216	1.45%	50,871	7,345	61,917
Dues & Subscriptions		45,807	1.14%	23,960	21,847	27,171
Accounting		35,938	0.90%	42,865	(6,927)	42,865
Security		64,628	1.61%	53,805	10,823	72,871
Depreciation		45,842	1.14%	11,250	34,592	15,000
Equipment/Bldg & Repairs		18,308	0.46%	18,784	(476)	21,184
Supplies		28,155	0.70%	27,474	681	36,634
Students Activities		28,642	0.72%	4,900	23,742	6,900
Textbooks		68,713	1.72%	18,725	49,988	18,725
Maintenance supplies		13,760	0.34%	38,520	(24,760)	48,533
Telephone		14,588	0.36%	8,041	6,547	10,531
Staff Development		37,195	0.93%	5,323	31,872	7,028
Advertising & Publicity		27,540	0.69%	11,015	16,525	12,735
Education supplies		15,447	0.39%	12,986	2,461	18,166
Payroll Fees		8,092	0.20%	6,932	1,160	9,265
Printing and Reproduction		3,819	0.10%	9,683	(5,864)	13,246
Gifts		2,400	0.06%	-	2,400	1,250
Postage & delivery		3,860	0.10%	1,700	2,160	2,160
LACOE - Administrative Fees		1,875	0.05%	1,500	375	1,500
Meals & Entertainment		696	0.02%	-	696	-
Furniture & Fixtures		4,508	0.11%	45,750	(41,242)	45,750
Computer supplies		1,183	0.03%	-	1,183	-
Furniture & equipment		3,112	0.08%	-	3,112	-
Equipment lease		-	0.00%	1,669	(1,669)	2,227
Meetings & Workshops		28	0.00%	4,248	(4,220)	4,920
Property Tax		(951)	-0.02%	2,044	(2,995)	2,537
Travel		2,926	0.07%	650	2,276	650
Total Operating Expenses	\$	1,673,608		\$ 1,274,388	\$ 399,220	\$ 1,699,258
Total Expenses	\$	4,004,916		\$ 3,666,549	\$ 338,367	\$ 4,864,101
Operating revenue in excess of operating expenses	\$	68,553		\$ 117,006	\$ (48,453)	\$ 180,640
(Other items considered to be nonoperating)						
Interest income		-		-	-	-
Change in net assets	\$	68,553		\$ 117,006	\$ (48,453)	\$ 180,640
Non-cash items - Depreciation		45,842		11,250	34,592	15,000
	\$	114,395		\$ 128,256	\$ (13,862)	\$ 195,640
Cost per Student	\$	15,113		\$ 13,836		\$ 18,355

PUENTE Charter School
Statement of Financial Position
As of March 31, 2023

ASSETS	Actual 3/31/2023	Actual 6/30/2022	Change \$
Current assets			
Cash (Charter School Savings)	\$ 759,193	\$ 834,440	\$ (75,246)
Cash (Capital Campaign)	5,798	5,794	4
Cash and cash equivalent	764,991	840,234	(75,241)
Accounts receivable, net	610,613	377,922	232,691
Contributions receivable, net	473,695	471,859	1,836
Receivables (net)	1,084,308	849,781	234,527
Total Current Assets	1,849,299	1,690,015	159,285
Land, building and equipment			
Furniture, Fixtures & Equipment	393,763	294,886	98,877
Work in Process	310,807	310,807	-
Less: Depreciation	(137,471)	(90,806)	(46,665)
	567,099	514,887	52,212
TOTAL ASSETS	\$ 2,416,398	\$ 2,204,902	\$ 211,497
LIABILITIES AND NET ASSETS			
Current liabilities			
Deferred revenue	609,643	248,485	361,158
Due to other programs to the Center	-	218,214	(218,216)
Total Current Liabilities	609,643	466,699	142,942
Net assets			
Change in Net Assets	\$ 68,553	\$ -	\$ 68,553
With donor restriction	500,136	500,136	-
Without donor restriction	1,238,067	1,238,067	-
Total net assets	1,806,756	1,738,203	68,553
Total liabilities and net assets	\$ 2,416,399	\$ 2,204,902	\$ 211,496
Matrix Analysis:			
Working Capital	\$ 1,239,656		
Cash Ratio:	1.25		
Quick Ratio:	3.03		
Burn Rate	\$ 444,991		
Months of Cash on Hand	1.7		
Debt-to-equity ratio	0.337		

PUENTE Charter School
Statement of Cash Flow
For the Month Ended March 31, 2023

	Actual 03/31/23	Audited 6/30/2022
Cash flows from operating activities:		
Change in total net assets	\$ 68,553	\$ 32,021
Adjustments to reconcile in net assets to net cash (used in) provided by operating activities:		
Depreciation	46,665	36,734
Changes in operating assets and liabilities:		
Accounts receivable	(232,691)	266,275
Contributions receivable	(1,836)	12,292
Deferred revenue	361,158	248,485
Due to other programs to the Center	(218,216)	(52,584)
Net cash provided by operating activities	23,633	543,223
Cash flows from investing activities:		
Purchase of property and equipment	(98,877)	(54,332)
Net cash used in investing activities	(98,878)	(54,332)
NET DECREASED IN CASH	(75,245)	488,891
CASH - BEGINNING	840,236	351,345
CASH - ENDING	\$ 764,991	\$ 840,236

PUENTE Charter School
Capital Expenditures
Work in Progress & Completion Percentage

Vendor	FY 2018-19	FY 2019-20	FY 2020-21	Total	% of Completion
Berliner Architects	109,403	27,002	-	136,406	100%
Brandow & Johnston	5,310	-	-	5,310	100%
BTC	756	-	-	756	100%
City of Los Angeles	25,437	34,530	-	59,967	100%
Craig Lawson & Co, LLC	32,508	33,842	-	66,350	100%
Department of Transportation	1,175	7,480	-	8,655	100%
GeoSystems Inc.	3,500	3,225	-	6,725	100%
Gibson Transportation	4,000	12,639	-	16,639	100%
Ter Molen Watkins	-	10,000	-	10,000	100%
Grand Total	182,089	128,718	-	310,807	

MEMORANDUM

To: Finance Committee Members
From: Angelica Castro
Vice President of Finance, PUENTE Charter School
Date: June 12, 2023
Re: Summary of Financial Results as of March 31, 2023

The purpose of this memo is to summarize the financial results of PUENTE Charter School Unaudited Financial Statements as of March 31, 2023. Please find a copy of the following reports in this Committee Packet:

1. Statement of Activities for period ended March 31, 2023 with comparative YTD Budget.
2. Statement of Financial Position as of March 31, 2023.
3. Statement of Cash Flow as of March 31, 2023.

1. Statement of Activities Analysis:

As of March 31, 2023, the Charter School reported total revenue of \$4,073,468 and expenses of \$4,004,916 for a net surplus of \$68,553. Total actual expenses are \$338,367 in excess of the YTD total budget.

Line items to highlight are as follow:

- Personnel cost: Personnel cost was \$2,331,308 or approximately 58.2% of expense allocation. Total actuals were below budgeted amount by \$60,853.
- Professional Services: Professional services was \$290,179 or approximately 7.25% of expense allocation. It exceeded YTD budgeted amount by approximately \$25,973. This is mainly due to the hiring of substitute teachers, after school program and custodial contractor.
- Special Ed Contract: Special Ed Contract was \$284,153 or 7.1% of expense allocation and exceeded budgeted amount by approximately \$175,453. This was mainly due to the expanded health and wellness component is a requirement from the CDE for ESSERS funding.
- Special Ed Fair Share: The Charter School is fiscally responsible for a partial payment of expense associated with Special Education Programs that the School District is responsible for and pays for out of its General Fund.
 - Special Ed Fair Share was \$152,604 or 3.81% expense allocation and exceeded YTD budgeted amount by approximately \$20,161.
- Food Service Contract: Food Service Contract was \$131,864 or 3.29% expense allocation and exceeded YTD budgeted amount by approximately \$41,171. This was mainly due to the expanded learning opportunity program funded by the CDE via ELOP grant.
- Textbooks: Textbook expenses were \$68,713 or approximately 1.72% of expense allocation. It exceeded YTD budgeted amount by approximately \$49,988. This was mainly due to the purchase of additional Reading Wonders series of books for all students Grades K – 5 and the addition of the Amplify Science Elementary School series of books for Grades K-5. Additional CDE funding via ESSERS grant.
- Staff Development: Staff Development expenses were \$37,195 or approximately 0.93% of expense allocation and exceeded YTD budgeted amount by approximately \$31,872. This was mainly due to the cost

associated with the Community Training Workshop. In addition, the school is supporting the beginning teacher induction for teacher's credential program.

- Advertising & Publicity: Advertising & Publicity was \$27,540 or approximately 0.69% of expense allocation and exceeded YTD budgeted amount by approximately \$16,525. This was mainly due to expenses related to the recruitment of new teachers and staff.
- Student Activities: Student activities expense was \$28,642 or 0.72% of expense allocation and exceeded budgeted amount by approximately \$23,742. This is mainly due to the expanded health and wellness component. A requirement from the CDE for stimulus funding. For programs such as the summer school extended learning activities, arts & music, community garden project & afterschool running team activities.

2. Statement of Financial Position

- Cash & cash equivalent: Cash balance was \$764,991. A decrease of \$75,241 from June 30, 2022. This was mainly due to the following:
 - Accounts Receivable: Increase of accounts receivable of \$232,691.
 - Contributions Receivable: Increase of contributions receivable of \$1,836.
 - Property Plan & Equipment: Net increase of PP&E of \$52,212
 - Deferred revenue: Deferred revenue was \$609,643. An increase of \$361,158 in advance payments.

Financial Key Indicators

Working Capital

- The Working Capital: PUENTE has \$1,239,656 available for current and future use.

Asset performance.

- Cash Ratio is \$1.25: This is another indicator of future cash flow. This means that for every \$1 of liability, the Charter School has \$1.25 of liquid cash.
- Quick Ratio \$3.03: Measures the ability to pay PUENTE's short-term liabilities by having assets that are readily convertible into cash. This means that the Charter School has capacity to pay off its current liabilities with the current assets and can easily fund its day-to-day operations. Here for every \$1 of current liability, the Charter School has \$3.03 of quick assets to pay for it.
- Months of Cash on Hand: Represents the number of months of operating expenses that the Center can pay with its current cash available. The Charter School has 1.7 months of cash on hand.

Capitalization structure assess long-term solvency and stability:

- Debt-to-equity Ratio: Debt-to-equity Ratio of \$0.337. This ratio indicates that most of PUENTE's assets and resources are provided by funding from the school district and not creditors or vendors. PUENTE Charter uses \$0.337 of debt financing for every \$1 of equity financing.

3. Statement of Cash Flow

The Charter School's cash decreased by \$75,245. This decrease was mainly due to the following:

- a. As the Statement of Activities reports equity earnings, the Statement of Cash Flow reports how much cash is coming from the equity earnings reported on the Statement of Activities. As such, on this statement we eliminate noncash items such as depreciation expense. (A non-cash item). As a non-cash item, change in depreciation of \$46,665 is added to the net surplus to reconcile the cash from operations.
- b. Accounts receivable increased by \$232,691. Increasing receivables means less inflow of cash through decrease in collections. Therefore, the \$232,691 is subtracted from the net surplus.
- c. Contribution receivables increased by \$1,836. Increasing receivables means less cash through the decrease in collections. Therefore, the \$1,836 is subtracted from the net surplus.
- d. Deferred revenue increased by \$361,158. Increasing deferred revenue means that we are receiving advance funding for future programs. The increase results in an inflow of cash. The \$361,158 is added to the net surplus.
- e. Due to Other Programs to the Center decreased by \$218,216. Decreasing liabilities means that obligations are paid now rather than later. As such, the Charter School has less cash on hand, as the \$218,216 is subtracted from the net surplus.
- f. Property & Equipment increased by \$98,877. This was mainly due to the payments related to the purchase of laptops and desktop computers for our students and staff. The increase resulted in a decrease in cash. As such, the change is subtracted from the total change in net assets.
- g. The total decrease in cash of \$75,245 is subtracted from the beginning cash of \$840,236 resulting in ending cash balance of \$764,991.

**PUENTE Charter School
Proposed Budget
Fiscal Year Begins
FYE 2023-24**

Average Daily Attendance (ADA)	283	265
Revenue Per Student	\$ 21,042	\$ 19,037
	FYE 2023-24 Proposed Budget	FYE 2022-23 APPROVED BUDGET
Prop 30 - Education Protection Account	808,000	633,190
LCFF - State Aid	2,300,619	2,176,024
LCFF -Prior Year		
ECIA/ESEA/IASA	10,300	10,000
Other Fed Income	180,877	682,056
Special Ed: IDEA Basic Local Assistance - CY	274,685	238,239
State Lottery - Charter Prop 20	13,468	13,076
Non Prop 20 Lottery Education Apportionment K-12	48,467	47,055
Other State Revenue	1,378,433	391,572
District pymt in lieu of Prop Tax	939,975	853,529
Charter School TOTAL	5,954,824	5,044,740
TOTAL REVENUE	5,954,824	5,044,740
EXPENSES		
Salaries	1,788,424	1,490,557
Salaries - Certificated Charter Position	1,269,137	1,098,580
Benefits	401,653	306,619
Payroll Taxes	244,687	207,677
Workers Comp Insurance	54,760	61,410
Salaries, Wages & Benefits	3,758,660	3,164,843
Building Lease	301,000	301,000
Special Ed Fair Chair	177,101	182,108
Food Service Contract	174,000	135,000
Professional Services	486,730	365,182
Special Ed Contract	313,685	165,000
Utilities	75,075	67,203
Insurance	68,217	61,917
Equip & Furniture	22,000	45,750
Security	56,329	72,871
Accounting	43,420	42,865
Maintenance Supplies	27,850	48,533
Maintenance Contract	13,680	-
Textbooks	55,850	18,725
Scholarships	-	-
Dues & Subscriptions	48,091	27,171
Supplies	28,436	36,634
Telephone	9,157	10,531
Equipment & Bldg Repair	21,242	21,184
Education Supplies	18,822	18,166
Printing and Reproduction	16,380	13,246
Depreciation	50,000	15,000
Payroll Fees	11,520	9,265
Staff Development	42,824	7,028
Advertising & Publicity	12,735	12,735
Meetings & Workshops	6,975	4,920
Equipment Lease	4,387	2,227
Property taxes	2,624	2,537
Postage and Delivery	3,186	2,160
Bank Fees	-	-
Student Activities	30,000	6,900
Gifts	3,750	1,250
Travel	5,000	650
LACOE - Administrative Fees	2,500	1,500
Operating Expenses	2,132,567	1,699,259
TOTAL EXPENSES	5,891,227	4,864,102
Total Revenue Less Expenses	63,597	180,638
Plus/(Less): Non-Cash Items		
Depreciation	50,000	15,000
Cash Surplus/Deficit (-)	113,597	195,638

**PUENTE Charter School
ACCOUNTING
POLICIES AND PROCEDURES
Manual
Internal Financial Controls**

June 12, 2023

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I. Introduction

The purpose of this manual is to describe all accounting policies and procedures currently in use at the PUENTE Learning Center and to ensure that the financial statements conform to generally accepted accounting principles; assets are safeguarded; guidelines of grantors and donors are complied with; and finances are managed with accuracy, efficiency, and transparency.

All Organization's staff with a role in the management of fiscal and accounting operations are expected to comply with the policies and procedures in this manual.

These policies will be reviewed annually and revised as needed by the staff and approved by the CAO (Chief Administrative Officer/School Leader) and the Board of Trustees.

II. Division of Responsibilities

The following is a list of personnel who have fiscal and accounting responsibilities:

Board of Trustees

1. Reviews and approves the annual budget
2. Reviews annual and periodic financial statements and information
3. Reviews CEO performance annually and establishes the salary
4. The Board Chair is authorized as a signer on the bank accounts
5. Reviews and approves all contracts over \$500,001
6. Reviews and approves all non-budgeted expenditures over \$500,001
7. Reviews and advises staff on internal controls and accounting policies and procedures
8. Determines whether the organization should have an audit and, if so, chooses and contracts with the auditor

Chief Executive Officer

1. Reviews and approves all financial reports including cash flow projections
2. Sees that an appropriate budget is developed annually
3. Reviews and signs all issued checks and/or approves check signing procedures
4. Reviews and approves all contracts under \$10,001
5. Reviews and approves all grant submissions
6. Approves inter-account bank transfers
7. Is on-site signatory for all bank accounts
8. Opens all bank statements, reviews for any irregularities, and reviews completed monthly bank reconciliations
9. Oversees the adherence to all internal controls
10. Approves all program expenditures
11. Monitors program budgets
12. Monitors grant reporting and appropriate release of temporarily restricted funds

Vice President of Finance

1. Reviews all payrolls and oversees Human Resource Department
2. Reviews and manages cash flow
3. Reviews all reimbursements and fund requests
4. Reviews and approves all inter-account bank transfers

5. Assists CEO with the development of annual and program budgets
6. Reviews all incoming invoices
7. Monitors and manages all expenses to ensure most effective use of assets
8. Oversees expense allocations
9. Monitors and makes recommendations for asset retirement and replacement
10. Reviews, revises, and maintains internal accounting controls and procedures
11. Prepares all financial reports
12. Reviews and approves invoices
13. Oversees the preparation of AP checks for signature
14. Reviews general ledger
15. Prepares monthly and year-end financial reports
16. Approves all bank accounts reconciliation
17. Manages Accounts Receivable

Staff Accountant

1. Prepares all inter-account bank transfers
2. Overall responsibility for data entry into accounting system and integrity of accounting system data
3. Processes invoices and prepares checks for signature
4. Reconciles all bank accounts
5. Mails vendor checks
6. Make bank deposits

HR Manager

1. Receives and opens all incoming accounting department mail except bank statements
2. Make bank transfers
3. Makes bank deposits
4. Manage the staffing process, including recruiting, interviewing, hiring and onboarding
5. Manage payroll compliance issues
6. Manage time and attendance and payroll processing

Development Associate

1. Initiates donor thank you letter acknowledgments

III. Chart of Accounts and General Ledger

PUENTE Learning Center has designated a Chart of Accounts specific to its operational needs and the needs of its financial statements as required by the California Department of Education. The Chart of Accounts is structured so that financial statements can be shown by natural classification (expense type) as well as by functional classification. The Vice President of Finance is responsible for maintaining the Chart of Accounts and revising as necessary.

The general ledger is automated and maintained using the accounting software Financial Edge (Blackbaud). All input and balancing is the responsibility of the Staff Accountants with final approval by the Vice President of Finance

The Vice President of Finance reviews the general ledger on a periodic basis for any unusual transactions.

IV. Cash Receipts

Cash receipts generally arise from:

1. Contracts and Grants
2. Student Funding
3. Direct donor contributions
4. Fundraising activities

The principal steps in the cash receipts process from July 2020 through February 2021 were:

The HR Manager picked up the daily mail from the USPS office. She opened and scanned all correspondence (including checks) and saved it under the Executive Team drive. An email was sent informing all members of the team that scanned copies of important documents were placed in the executive drive under each member's folder. The Vice President of Finance proceeded with moving all incoming mail from her folder onto the Finance drive and notified the Staff Accountant to proceed with recording invoices on the monthly budget forecast for future payments. The Director of HR informed the CEO, Vice President of Finance and Staff Accountants of any checks received. She made copies and stamp checks with PUENTE's seal and proceeded to make the deposits via the Bank's App or in person. A copy of the deposit receipt was forward via email to the Finance Department team members and original copies were placed in the Finance inbox for processing.

The principal steps in the cash receipts as of June 2023:

Finance Department staff pick up mail from locked mail box. Mail is open, date stamp, and distributed. Checks are forward to Vice President of Finance, stamps all checks "for deposit only," and makes copies of each check and backup information. The checks are kept in a locked cabinet until handed to the Staff Accountantd for processing and deposit.

Weekly (or more often if necessary), the Staff Accountant takes the deposit to the bank for deposit. A copy of the deposit slip is attached to the deposit. The deposits are put in a file to attach to the bank statement. The deposit log onto the budget forecast.

All cash received will be counted, verified, and signed off by Vice President of Finance and another available staff member. The cash will immediately be posted using the appropriate allocation. A receipt will be given to the paying party and a copy kept for internal purposes. The cash will be kept in a locked, secure location and deposited within 24 business hours.

V. Inter-Account Bank Transfers

The Vice President of Finance monitors the balances in the bank accounts. The Vice President of Finance recommends to the CEO when a transfer should be made to the PUENTE Learning Center operating account to process payables. The CEO and Vice President of Finance provide approval of all transfers in/out of the PUENTE Charter bank account.

VI. Cash Disbursements & Expense Allocations

Cash disbursements are generally made for:

1. Payments to vendors for goods and services
2. Payroll
3. Taxes/license fees
4. Staff training and development
5. Memberships and subscriptions
6. Meeting expenses
7. Employee reimbursements

The Learning Center for both the Center and the Charter School are processed weekly. Invoices submitted to the Finance Department associated with the Charter School are paid directly out of the Learning Center's operating account. Funds from the Charter School savings are transfer to operating to cover for any liability associated with the Charter School. Invoices received by Friday will be entered and paid by Thursday of the following week or using the invoice terms. Checks can be prepared manually within one day, but this should be limited to emergency situations.

Requests for cash disbursements are submitted to Accounting in three ways:

1. Original invoice that arrived via USPS or email
2. Purchase request (submitted on approved form)
3. Employee expense report or reimbursement request

All invoices must have the account code written on them and approved by the Vice President of Finance prior to being submitted to accounting.

Every employee reimbursement or purchase request must be documented on the approved form with travel authorization, receipts, nature of business, program allocation, and funding source (if applicable) before approving for reimbursement as follows:

Lodging - an itemized receipt from the hotel detailing all charges, the person(s) for whom the lodging was provided, and the specific business purpose.

Meals and Entertainment - a receipt must be provided showing the cost of food, beverage, and gratuities, including the names of every person for whom food or beverage was provided, and the specific business purpose.

Other Expenditures - a receipt from the vendor detailing all goods or services purchased (including the class of service for transportation) and the specific business purpose.

The Vice President of Finance with the Staff Accountant review all requests for payment and:

1. Verifies expenditure and amount
2. Approves for payment if in accordance with budget
3. Provides or verifies appropriate allocation information
4. Provides date of payment taking into account cash flow projections
5. Immediately enters them into the Accounts Payable module
6. Submits checks, with attached backup documentation, to CEO and for approval and signature. All checks require a second signature from the Director of HR.
7. Mails checks and appropriate backup documentation
8. Files all backup documentation in the appropriate file
9. Runs an accounts payable aging at the middle and end of each month and submits to the CEO to assure timely payment of all invoices

Expense Allocations

Most non-salary expenses that benefit more than one function (administration, fundraising, and program) are spread across centers using a shared cost method. Under this method, the number of full-time equivalents (FTEs) within a department are divided by the total number of FTEs at the organization to determine the percentage of shared costs they should bear. This is done on a monthly basis by the Vice President of Finance.

VII. Credit Card Policy and Charges

PUENTE Learning Center has one credit card. The card was issued to the CEO and approved by the Board Members. The credit card is used for business only purposes. Unauthorized use of the credit card includes: personal expenditures of any kind; expenditures which have not been properly authorized; meals, entertainment, gifts, or other expenditures which are prohibited by budgets, laws, and regulations, and the entities from which the School receives funds.

The receipts for all credit card charges will be given to the Staff Accountant within two (2) weeks of the purchase along with proper documentation. The Staff Accountant will verify all credit card charges with the monthly statements and obtain the proper allocation information for posting. A copy of all charges will be attached to the monthly credit card statement when submitted to the CEO for approval and signing.

VIII. Accruals

To ensure a timely close of the General Ledger, The School may book accrual entries. Some accruals will be made as recurring entries.

IX. Bank Account Reconciliations

1. All bank statements are given unopened to the Vice President of Finance. The Vice President of Finance reviews the statements for unusual balances and/or transactions.
2. The Vice President of Finance gives the statements to the Staff Accountant for timely reconciliation as follows: a comparison of dates and amounts of deposits as shown in the accounting system and on the statement, a comparison of inter-account transfers, an investigation of any rejected items, a comparison of cleared checks with the accounting record including amount, payee, and sequential check numbers.
3. The Staff Accountant will verify that voided checks, if returned, are appropriately defaced and filed.
4. The Staff Accountant will investigate any checks that are outstanding over six months.
5. The Staff Accountant will attach the completed bank reconciliation to the applicable bank statement, along with all documentation.

X. Property and Equipment

Property and equipment are recorded at a cost if purchased or at fair value at the date of donation if donated. It includes items such as:

1. Office furniture and equipment
2. Computer hardware
3. Computer software
4. Leasehold improvements

Expenditures for repairs and maintenance are charged to operation when incurred, while major renewals and betterments are capitalized. It is the organization's policy to capitalize all items which have a unit cost greater than one thousand dollars (\$1,000) and the useful life is greater than one year. Items purchased with a value or cost less than one thousand dollars (\$1,000) will be expensed in the period purchased.

The depreciation period for capitalized assets is as follows:

Buildings	30 Years
Furniture and Equipment	3-8 Years
Software	5 Years
Leasehold improvements	Length of lease

1. A Fixed Asset worksheet is maintained by the Vice President of Finance including date of purchase, asset description, purchase/donation information, cost/fair market value, donor/funding source, identification number, life of asset.
2. Annually, a physical inspection and inventory will be taken of all fixed assets and reconciled to the general ledger balances.
3. The Vice President of Finance shall be informed in writing of any change in status or condition of any property or equipment.
4. Depreciation is recorded on a monthly basis. Depreciation is computed using the straight-line method over the estimated useful lives of the related assets. Any impaired assets discovered during the inventory will be written down to their actual value.

XI. Personnel Records

1. All personnel files contain the following documents: an application and/or resume, date of employment, position and pay rate, authorization of payroll deductions, W-4 withholding authorization, termination data where applicable, a signed confidentiality agreement, a signed acknowledgement of receipt of Employee Handbook, an emergency contact form, and other forms as deemed appropriate by the HR Manager.
2. All employees will fill out an I-9 form and submit the allowable forms of identification to the Human Resources Manager.
3. The completed I-9 forms will be kept in a secure location separate from the personnel files.
4. All employees must have a criminal background and an FBI background check on file.
5. All teachers must provide a copy of their teacher's certificate.
6. All personnel files are to be kept in a secure, locked file cabinet and accessed only by authorized personnel.

XII. Payroll Processing

PUENTE outsources its payroll and timekeeping processes to Automatic Data Processing, Inc., also known as ADP, and American provided of human resources management software and services. They offer services which provide accurate payroll and tax services, as well s, the cloud based automated time and attendance tracking and scheduling tool, ADP Workforce Now. In addition, ADP provides labor costs and compliance services.

PUENTE has put in place systematic measures such as reviews, checks and balances, methods and procedures to ensure proper payroll process. Such measures aim to keep in compliance with policies, rules, regulations and laws. Management's primary goal is to assure operational effectiveness and efficiency, safeguard PUENTE's assets and resources, deter and detect errors, fraud and employee theft, and ensure accuracy of payroll data.

PUENTE's preventive controls

- Segregation of Duties
- System Access Limitations

PUENTE's controls

- Management review
- Internal/External Audits

Hiring Process and Procedures

PUENTE's management believes that hiring qualified individuals to fill positions contributes to the overall success of the organization. Each employee is hired to make significant contributions to PUENTE. In hiring the most qualified candidates for positions, PUENTE employs the following process:

- Initial Request
 - A request is initiated by the department supervisor, approved by the CEO and then forwarded to the human resource HR department.
- Intake meeting
 - HR will arrange a meeting with the supervisor making the request and will conduct a meeting prior to posting a job opening to learn more about the position, the requirements and the profile of the ideal candidate. The recruiting strategy including the development of a job description, will be set during this meeting and expectations established with all the key stakeholders.
- Job postings
 - HR will create job postings that briefly describe the job opening and communicate PUENTE's brand. All job openings will be posted concurrently on PUENTE's intranet and externally with sources appropriate for the position being filled. Jobs will remain posted until the positions is filled.
- Internal applicants
 - Current employees with a satisfactory employment status may apply for internal job openings. The consents of the employee's manager and the HR department may be necessary for employees with less than one year of service with PUENTE.
 - All applicants viewing a posted vacancy will be considered based on their qualifications and ability to perform the job successfully. Internal candidates who are not selected will be notified by the HR department.
- Interview process
 - The HR department and requesting supervisor will screen applications and resumes prior to scheduling interviews. Initial interviews are generally conducted by the HR department interview questions with a structured interview process.

- After a successful interview with HR, the candidate is scheduled to interview with the requesting supervisor and if needed, will interview with the CEO. The HR department will notify applicants who are not selected for positions at PUENTE.
- Reference checks
 - HR will conduct professional reference checks on the top candidates based on the results of the candidate interviews. A minimum of three, if possible, of professional references are required from each candidate.
- Job offers
 - After a decision has been made to hire a candidate, an offer will be made contingent on the satisfactory completions of reference checks, background checks and testing.

Internal applicants must complete required background checks or tests if not previously completed.

Once the HR department received satisfactory results from all required background checks and tests, candidates will be provided with a final job offer. If a candidate fails to accept and offer of employment within 7 calendar days, the offer may be rescinded by the organization.

1. Assigned with a user ID and personal password at the time of hire, each nonexempt employee enters their hours worked each day by using ADP's Workforce Now Time and Attendance software by logging into ADP at the beginning of their scheduled work hour and at the end of their scheduled work day. Timecards or the clocking app services are available at multiple kiosks in the building that have been secured, at an employee's work station or on a mobile device
2. For nonexempt employees: Federal and state laws required us to keep accurate records of hours worked by nonexempt (hourly employees. Employee clocks in (and perform work) no more than seven minutes ahead of his/her scheduled starting time and clock out (and perform work) not later than seven minutes after end of day, unless authorized by supervisor in advance.
3. Every nonexempt employee of the organization is required to accurately clock in and out and maintain an accurate record of all hours worked, and are required to properly document all lunch periods taken. Regular rest periods taken need not be required, but rest breaks of more than 15 minutes should be accurately entered into the timekeeping system. Employees are required to notify Human Resources of any pay discrepancies, unrecorded or misreported work hours, or any involuntarily missed (or late of short) meal or rest break periods.
4. HR Manager will process payroll in a timely manner and record vacation time, holiday hours, sick time, and any other information deemed necessary to properly reflect time worked.
5. Manual Paychecks will be distributed by the HR Manager on the Thursday or Friday of the pay week. If the pay date falls on a weekend or holiday the paychecks will be distributed the day before.
6. If the employee requests that his/her check be turned over to a third party, the request must be made in writing prior to distribution.
7. Employees may choose direct deposit to a designated bank account. Their paycheck is deposited directly into the designated account on the payroll date. The employee will receive a verification stub.
8. The Vice President of Finance will review payroll expenditures and allocations monthly.
9. All quarterly federal and state payroll reports will be prepared and filed appropriately.
10. All W-2 statements are issued to employees prior to January 31st of the following year for the prior calendar year.

Accounting for Benefits

After Insurance premiums, vacation time, sick pay and voluntary deductions such as charitable contributions and retirement accounts is accounted for through payroll procedures. Employees provide PUENTE with written authorization for each voluntary deduction withheld from their payroll.

XIII. End of Month and Fiscal Year-End Close

1. The Vice President of Finance will review and sign off on all month and year-end journal entries. They will be printed and filed for audit trail purposes.
2. At the end of each month and fiscal year end, the Vice President of Finance will review all balance sheet accounts including verification of the following balances: cash accounts match the bank reconciliations, fixed assets accounts reflect all purchases, write-downs and retirements, accounts receivable and payable accounts match outstanding amounts due and owed.
3. The income and expense accounts review will include reconciliation to amounts received and expended and verification that payroll expenses match the payroll reports including federal and state payroll tax filings.
4. Once the final monthly and fiscal year-end financial statements are run, reviewed, and approved by the Vice President of Finance and CEO, no more entries or adjustments will be made into that month or year's ledgers.
5. At the end of the fiscal year, the Vice President of Finance will prepare the annual Return for Organization Exempt from Income Tax (IRS Form 990). The return will be presented to the CEO, the Board Finance Committee, and the Board Chair for their review and approval. The Vice President of Finance will then file the return with the Internal Revenue Service by the annual deadline.
6. All other appropriate government filings including those required by the state tax board and attorney general's office will be completed and filed with the appropriate agency.

XIV. Financial Reports

The Vice President of Finance will prepare the monthly and annual financial reports for distribution to the CEO and Board of Trustees. The reports will include: Statement of Financial Position, Statement of Activities, budget versus actual report, and statement of cash flow projection, and any other requested reports.

Periodic and annual financial reports will be submitted to the Finance Committee and Board of Trustees for review and approval.

Any employee who handles cash (either its receipt or disbursement) or who holds a position of financial trust must have fidelity bond insurance coverage. The adequacy of such coverage shall be subject to board review with the School's insurance agent on an annual basis at a minimum.

Annually, an Independent Auditors conduct an audit in accordance with auditing standards generally accepted in the USA and the standards applicable to financial audits contained in Government Auditing Standards issued by the Comptroller General of the United States. An Independent Auditor's Report of the Financial Statements for the current Fiscal Year are issued after completion of the Audit to the Board of Trustees.

XV. Fidelity Insurance Coverage

Any employee who handles cash (either its receipt or disbursement) or who holds a position of financial trust must have fidelity bond insurance coverage. The adequacy of such coverage shall be subject to board review with the School's insurance agent on an annual basis at a minimum.

XVI. Fiscal Policy Statements

1. All cash accounts owned by the School will be held in financial institutions which are insured by the FDIC. No bank account will carry a balance over the FDIC insured amount.
2. All capital expenditures which exceed one thousand (\$1,000) will be capitalized.
3. No Salary advances are allowed at any time regardless of the circumstances.
4. No travel cash advances will be made except under special conditions and pre-approved by the CEO.
5. Reimbursements will be paid upon complete expense reporting and approval using the official School's form. Reimbursements to the CEO will be authorized by the Board Chair.
6. Any donated item with a value exceeding \$500 will be recorded and a letter acknowledging the donation will be sent to the donor within two weeks of the receipt of the donation.
7. The CEO and the HR Manager are the signatories on School's bank accounts. The Vice President of Finance is allowed to sign checks as a backup signatory.
8. Bank statements will be reconciled monthly. All bank statements will be given unopened to the Vice President of Finance for review.
9. Correction fluid and/or tape will never be used in any accounting documents.
10. Accounting and personnel records will be kept in locked file cabinets in the finance office and only parties with financial and/or HR responsibility will have access to the keys.