



LOS ANGELES UNIFIED SCHOOL DISTRICT

CHARTER SCHOOLS DIVISION

ANNUAL PERFORMANCE-BASED OVERSIGHT VISIT REPORT*

2021-2022 SCHOOL YEAR

FOR

OCEAN CHARTER SCHOOL - 5962

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 responds 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 Specialist will reach out with more details, as needed. Thank you.



Charter School Name:		Ocean Charter School			Location Code:	5962
Current Address:			City:	ZIP Code:	Phone:	Fax:
12870 Panama St.			Los Angeles	90066	(310) 827-5511	(310) 827-2012
Current Term of Charter¹:				LAUSD Board District:	LAUSD Local District:	
July 1, 2018 to June 30, 2025				4	West	
Number of Students Currently Enrolled:		Enrollment Capacity Per Charter:		Number Above/Below Enrollment Capacity (day of visit):		+28
560		532				
Grades Currently Served:		Grades To Be Served Per Charter:		Percent Above/Below Enrollment Capacity (day of visit):		+5.2%
TK-8		TK-8				
Norm Enrollment Number:			546			
Total Number of Staff Members:		92	Certificated:	22	Classified:	70
Charter School's Leadership Team Members:			Kristy Mack Fett, Executive Director; Stephanie Edwards, Executive Director			
Charter School's Contact for Special Education:			Kristy Mack Fett, Executive Director; Renee Williams, APEIS (LAUSD)		SELPA & Option:	LAUSD Option 1
CSD Assigned Administrator:		Katrina Taylor, CSD		CSD Fiscal Services Manager:	Andrea Ines, CSD	
Other School/CSD Team Members:			N/A			
Oversight Visit Date(s):			4/1/22		Fiscal Review Date (if different):	4/22/22
Is school located on a District facility? If so, please indicate the applicable program (e.g. Prop 39, PSC, conversion, etc.):			Yes; lease/charter augmentation grant		LAUSD Co-Location Campus(es) (if applicable):	Panama Street Site
					Date of Co-Location meeting with Operations Team:	N/A
Certificate of Occupancy (COO) or Temporary Certificate of Occupancy Type: (if a TCO, please note expiration date)			N/A		COO/TCO Approved Grade Levels and Occupancy Loads:	N/A

¹ AB 130 added Section 47607.4 to California 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	No Rating	4	2



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 2021-2022*. 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-



CHARTER RENEWAL CRITERIA

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REPORT GUIDE

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
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <ul style="list-style-type: none"> G2: BROWN ACT - The Governing Board continues to comply with all material provisions of the Brown Act. As evidenced by documents provided in Binder 1, the Board of Trustees (Governing Board) held twelve (12) regular board meetings and eight (8) special board meetings during the time period of April 2021 to March 2022. Agenda items provide sufficient contextual information so that a member of the public is able to understand what is being discussed and is able to make an informed decision to attend or not. All board meetings were held remotely. Additionally, binder documentation provided evidence that the Board of Trustees maintains minutes that are publicly available on Ocean Charter School’s website. The Board of Trustees members have received Brown Act training, as evidenced by certifications provided and board meeting minutes. G4: RESPONSIVE AND ACCOUNTABLE GOVERNANCE - The Governing Board regularly considers school performance, stakeholder input, and other data to inform decision-making (e.g., approving action plans, resources, evaluation criteria). Based on review of the agendas and minutes provided, the Governing Board reviews and discusses the following data: academic, attendance, internal assessment, enrollment, staffing, and financial. Board agendas include additional information to provide context to agenda items. <p><u>Areas Noted for Further Growth and/or Improvement</u> None</p> <p><u>Corrective Action Required</u> None noted that require immediate action to remedy concerns indicated in this report.</p>	
<p>Notes: None</p>	



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Ocean Charter School (5962)

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 4/1/2022

****NOTE: If the CSD gathers or otherwise receives substantial evidence of conflict(s) of interest with respect to a Governing Board member or person in a school leadership position (e.g. CEO or principal), a charter school shall receive a rating of 1 in this category.***



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
- 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., SSC and ELAC)
- Evaluation of school’s executive level leadership (including, but not limited to, those positions reporting to the Governing Board, as indicated in Element 4, such as Executive Director, Area Superintendent, Principal, etc.)

	Rubric	Sources of Evidence
Performance	<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 substantially 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	<input checked="" type="checkbox"/> Organizational chart (B1.1) <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 type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Committee/council calendars, agendas, minutes, 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 Brown Act
- Governing Board holds its meetings at a location(s) and in a manner that complies with teleconferencing, closed session, and access and Reasonable Accommodation requirements and the public has access to the meetings from a location(s) within the jurisdictional boundaries of LAUSD, as noted in the charter petition
- Governing Board meeting agendas are posted and maintained, as appropriate, including on the school’s website and in accordance with the Brown Act and with sufficient specificity
- Governing Board meetings are held in accordance with the requirements of E.C. 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 type="checkbox"/> Observation of Governing Board meeting <input 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 policy, to honor and protect the rights of students, employees, parents, and the public in the following areas:

- Student discipline
- Employee grievances and discipline
- Parent/stakeholder complaint resolution procedure (complaints outside regulatory scope of UCP)
- Uniform Complaint Procedures

Rubric		Sources of Evidence
Performance	<input checked="" type="checkbox"/> The Governing Board has highly 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 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 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	<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"/> H.R. policies and procedures regarding staff due process (B1.13) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" 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 (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 LCAP and additional school plans, e.g., CSI, SPSA (action plans and progress toward LCAP goals)
- Transparent governance and accountability to stakeholders
- Monitoring of staffing needs and 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, 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, 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, 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, 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 and minutes with supporting materials and evidence of school performance and other internal data, including but not limited to: (B1.4) <ul style="list-style-type: none"> <input 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 checked="" type="checkbox"/> Internal assessment data <input checked="" type="checkbox"/> Enrollment data <input checked="" type="checkbox"/> Staffing data (retention, turnover, certification, etc.) <input checked="" type="checkbox"/> Board meeting calendar (B1.5) <input checked="" type="checkbox"/> Other evidence of a system for Board review and analysis of internal school data to inform decision-making (B1.14a) <input checked="" type="checkbox"/> Board member training documentation (roles, responsibilities, etc.) (B1.14b) <input type="checkbox"/> Observation of Governing Board meeting <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	<p><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)</p> <p><input type="checkbox"/> The school is fiscally stable, with positive net assets in the most current independent audit report*</p> <p><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*</p> <p><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*</p> <p>*Additional considerations that could influence the rating may include: inadequate cash flow, financial condition and/or enrollment reflecting a downward trend or beginning to show signs that illustrate or contribute to 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.).</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>	<p><input checked="" type="checkbox"/> Board meeting agendas and minutes (B1.4)</p> <p><input type="checkbox"/> Other evidence of a system for Board review and monitoring of fiscal policies, procedures, budget, and finances (B1.15)</p> <p><input type="checkbox"/> Observation of Governing Board meeting</p> <p><input checked="" type="checkbox"/> Discussion with leadership</p> <p><input checked="" type="checkbox"/> Independent audit report(s)</p> <p><input checked="" type="checkbox"/> Other financial information submitted by the school</p> <p><input checked="" type="checkbox"/> Other: (see Fiscal Operations section below)</p>



G6: FISCAL MANAGEMENT AND ACCOUNTABILITY - GOVERNANCE QUALITY INDICATOR #6

<p><i>The Governing Board has a system in place to ensure sound fiscal management and accountability:</i></p> <ul style="list-style-type: none"> • 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. 			
<p style="text-align: center;">Rubric</p>		<p style="text-align: center;">Sources of Evidence</p>	
Performance	<p><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</p> <p><input 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</p> <p><input checked="" 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.)</p> <p><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.)</p>	<p><input checked="" type="checkbox"/> Board meeting agendas and minutes (B1.4)</p> <p><input type="checkbox"/> Other evidence of a system for Board review and monitoring of fiscal policies, procedures, budget, and finances (B1.15)</p> <p><input type="checkbox"/> Observation of Governing Board meeting</p> <p><input checked="" type="checkbox"/> Discussion with leadership</p> <p><input checked="" type="checkbox"/> Independent audit report(s)</p> <p><input checked="" type="checkbox"/> Other: (see Fiscal Operations section below)</p> <p>The rating of “2” is primarily due to the material weakness (relating to Financial Statement – Year-End Closing) identified in the school’s 2020-2021 independent audit report. See further details under the Areas Noted for Further Growth and/or Improvement section below.</p>	
<p>Progress on LAUSD Board of Education Benchmarks and/or MOU related to GOVERNANCE (if applicable):</p>			
<p>N/A</p>			



STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE	RATING*
Summary of School Performance	No Rating
California Department of Education’s (CDE) Charter School’s Performance Category	High 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><u>Areas of Demonstrated Strength and/or Progress</u></p> <ul style="list-style-type: none"> See Notes section below. <p><u>Areas Noted for Further Growth and/or Improvement</u></p> <ul style="list-style-type: none"> A11: ENGLISH LEARNER RECLASSIFICATION – The school did not reclassify any of its English Learners. <ul style="list-style-type: none"> The school’s 2020-2021 reclassification rate is 0.0% compared to the state average of 6.9%. <p><u>Corrective Action Required</u></p> <p>None noted that require immediate action to remedy concerns indicated in this report.</p>	
<p>Notes:</p> <p>*Due to the COVID-19 pandemic, state law suspended the reporting of state indicators on the 2021 Dashboard. Accordingly, no overall score will be issued in the Student Achievement and Educational Performance category for the 2021-2022 Annual Performance-Based Oversight Report. Please note that, although the overall Student Achievement and Educational Performance category is not scored, Indicator A11: English Learner Reclassification below is scored based on 2020-2021 reclassification data.</p> <p>A11: In response to the reclassification data, school leadership shared, “OCS believes the district may have been looking at the wrong report. On Fall 1, the students had not been summative tested yet. The summative test results appear on the EOY report that we’ve extracted here from CALPADS, Report 2.16 (attached) that shows a total of 17 students reclassified.”</p>	



2.16 - English Language Acquisition Status - ELs Reclassified RFEP (EOY 3)

Academic Year:	2020-2021	LEA:	Ocean Charter	User ID:	ckemp@exed.net
View:	Snapshot	School Type:	All	Revision Date:	7/17/2021 11:43:59 PM
Revision ID:	2892275	School:	All	Print Date:	7/18/2021 9:19:28 PM
School Code		School Name		# EL reclassified RFEP in this school during the Academic Year	
0102335		Ocean Charter		17	
Total - Selected Schools				17	
Grade:	01-First Grade,02-Second Grade,03-Third Grade,04-Fourth Grade,05-Fifth Grade,06-Sixth Grade,07-Seventh Grade,08-Eighth Grade,09-Ninth Grade,10-Tenth Grade,11-Eleventh Grade,12-Twelth Grade,KN-Kindergarten	Ethnicity/Race:	All	Gender:	All
Students with Disabilities:	All	English Language Acquisition Status:	All	Foster Youth:	All
Education Program Membership:	All	Socio-Economically Disadvantaged:	All		

The school’s reclassification criteria (LAUSD EL Master Plan) are as follows:

1. Assessment of Language Proficiency: ELPAC Overall Performance Level 4
2. Basic Skills Assessment: K – DIBELS 8 scores of Benchmark or Above Benchmark in all DIBELS 8 assessed measures; 1st-5th grade – DIBELS 8 scores of Benchmark or Above Benchmark in all DIBELS 8 assessed measures or ELA SBA (3rd-5th grades) score of Standard Met or Standard Exceeded; 6th-8th grade – Reading Inventory score of Basic, Proficient or Advanced or ELA SBA score of Standard Met or Standard Exceeded
3. Teacher Evaluation: K-5th grade – ELA composite score of 3 or 4; 6th-8th grade - Grade level English or LTEL course grade of C or better
4. Parent opinion and consultation

The school’s percentage of “At-Risk” English Learners is at 12.1% compared to the state at 10.1%.

The school’s percentage of “Long-Term English Learners” (LTELs) is at 6.1% compared to the state at 17.1%.

****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.***



A1: DASHBOARD SCHOOLWIDE ELA INDICATOR - QUALITY INDICATOR #1

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> California School Dashboard Schoolwide ELA data (CDE) 		
Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The schoolwide Dashboard ELA Indicator color is Blue <input type="checkbox"/> The schoolwide Dashboard ELA Indicator color is Green; or Yellow and at/above statewide average <input type="checkbox"/> The schoolwide Dashboard ELA Indicator color is Yellow and below statewide average; or Orange <input type="checkbox"/> The schoolwide Dashboard ELA Indicator color is Red <input checked="" type="checkbox"/> Not Available - No color assigned for the ELA Indicator on the Dashboard	<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)

A2: DASHBOARD SCHOOLWIDE MATH INDICATOR - QUALITY INDICATOR #2

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> California School Dashboard Schoolwide Math data (CDE) 		
Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The schoolwide Dashboard Math Indicator color is Blue <input type="checkbox"/> The schoolwide Dashboard Math Indicator color is Green; or Yellow and at/above statewide average <input type="checkbox"/> The schoolwide Dashboard Math Indicator color is Yellow and below statewide average; or Orange <input type="checkbox"/> The schoolwide Dashboard Math Indicator color is Red <input checked="" type="checkbox"/> Not Available - No color assigned for the Math Indicator on the Dashboard	<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)



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

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> California School Dashboard Schoolwide ELPI data (CDE) 		
Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The schoolwide Dashboard ELPI color is Blue <input type="checkbox"/> The schoolwide Dashboard ELPI color is Green; or Yellow and at/above statewide percentage <input type="checkbox"/> The schoolwide Dashboard ELPI color is Yellow and below statewide percentage; or Orange <input type="checkbox"/> The schoolwide Dashboard ELPI color is Red <input checked="" type="checkbox"/> Not Available - No color assigned for the ELPI on the Dashboard	<input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Summative ELPAC report (CDE) (B2.3) <input type="checkbox"/> Other: (Specify)

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

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> California School Dashboard Schoolwide CCI data (CDE) 		
Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The schoolwide Dashboard CCI color is Blue <input type="checkbox"/> The schoolwide Dashboard CCI color is Green; or Yellow and at/above statewide percentage <input type="checkbox"/> The schoolwide Dashboard CCI color is Yellow and below statewide percentage; or Orange <input type="checkbox"/> The schoolwide Dashboard CCI color is Red <input type="checkbox"/> Not Available - No color assigned for the CCI on the 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

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> California School Dashboard Schoolwide Chronic Absenteeism Indicator data (CDE) 		
Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator color is Blue <input type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator color is green; or Yellow and at/above statewide percentage <input type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator color is Yellow and below statewide percentage; or Orange <input type="checkbox"/> The schoolwide Dashboard Chronic Absenteeism Indicator color is either Red <input checked="" type="checkbox"/> Not Available - No color 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	<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)

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

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> California School Dashboard Schoolwide Suspension Rate Indicator data (CDE) 		
Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The schoolwide Dashboard Suspension Rate Indicator color is Blue <input type="checkbox"/> The schoolwide Dashboard Suspension Rate Indicator color is Green; or Yellow and at/below statewide percentage <input type="checkbox"/> The schoolwide Dashboard Suspension Rate Indicator color is Yellow and above statewide percentage; or Orange <input type="checkbox"/> The schoolwide Dashboard Suspension Rate Indicator color is Red <input checked="" type="checkbox"/> Not Available - No color assigned for the Suspension Rate Indicator on the Dashboard	<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)



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

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> California School Dashboard Schoolwide Graduation Rate Indicator data (CDE) 		
	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator color is Blue <input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator color is Green; or Yellow and at/above statewide percentage <input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator color is Yellow and below statewide percentage; or Orange <input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator color is Red <input type="checkbox"/> Not Available - No color assigned for the Graduation Rate Indicator on the Dashboard <input checked="" type="checkbox"/> Not Applicable - Graduation Rate Indicator 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 checked="" type="checkbox"/> Provide Graduation Requirements (Additional info within "Notes" section above) (B2.5) <input type="checkbox"/> Other: (Specify)

A8: DASHBOARD SUBGROUP ELA - QUALITY INDICATOR #8

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> Performance of all numerically significant subgroups (30 or more students) on the California School Dashboard ELA (Students with Disabilities, English Learners, Socioeconomically Disadvantaged, etc.)(CDE) 		
	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> All numerically significant subgroups have "Status/Distance From Standard (DFS)" scores above the statewide averages <input type="checkbox"/> The majority of numerically significant subgroups have "Status/DFS" scores above the statewide averages <input type="checkbox"/> Less than a majority of the numerically significant subgroups have "Status/DFS" scores above the statewide averages <input type="checkbox"/> None of the school's numerically significant subgroups have "Status/DFS" scores above the statewide averages <input checked="" type="checkbox"/> Not Available - No assessment of performance for this indicator	<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)



A9: DASHBOARD SUBGROUP MATH - QUALITY INDICATOR #9

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> Performance of all numerically significant subgroups (30 or more students) on the California School Dashboard Math (Students with Disabilities, English Learners, Socioeconomically Disadvantaged, etc.)(CDE) 		
Rubric		Sources of Evidence
Performance	<input type="checkbox"/> All numerically significant subgroups have “Status/DFS” scores above the statewide averages <input type="checkbox"/> The majority of numerically significant subgroups have “Status/DFS” scores above the statewide averages <input type="checkbox"/> Less than a majority of the numerically significant subgroups have “Status/DFS” scores above the statewide averages <input type="checkbox"/> None of the school’s numerically significant subgroups have “Status/DFS” scores above the statewide averages <input checked="" type="checkbox"/> Not Available - No assessment of performance for this indicator	<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)

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

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> Performance of all numerically significant subgroups (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	<input type="checkbox"/> All numerically significant subgroups have “Status/DFS” scores above the statewide percentages <input type="checkbox"/> The majority of numerically significant subgroups have “Status/DFS” scores above the statewide percentages <input type="checkbox"/> Less than a majority of the numerically significant subgroups have “Status/DFS” scores above the statewide percentages <input type="checkbox"/> None of the school’s numerically significant subgroups have “Status/DFS” scores above the statewide percentages <input type="checkbox"/> Not Available - No assessment of performance for this indicator <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"/> 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 2020-2021 (CDE)

	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The school reclassifies English Learners at a rate higher than the state average <input type="checkbox"/> The school reclassifies English Learners at a rate similar to the state average <input type="checkbox"/> The school reclassifies English Learners at a rate lower than the state average <input checked="" type="checkbox"/> The school did not reclassify any of its English Learners <input type="checkbox"/> Not Available - The school did not have any English Learners <input type="checkbox"/> Not Applicable - No assessment of performance for this indicator	<input checked="" type="checkbox"/> Reclassification report (CDE) <input checked="" type="checkbox"/> Office of Data & Accountability's Data Set (B2.1) <input checked="" type="checkbox"/> Summative ELPAC report (CDE) (B2.3) <input checked="" type="checkbox"/> Reclassification Criteria for all applicable grade levels (Additional info within "Notes" section above) (B2.4) <input checked="" type="checkbox"/> Rate of "At Risk" ELs in comparison to the state average <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Higher <input type="checkbox"/> Same <input type="checkbox"/> Lower (Additional info within "Notes" section above) <input checked="" type="checkbox"/> Rate of "LTELs" in comparison to the state average <ul style="list-style-type: none"> <input type="checkbox"/> Higher <input type="checkbox"/> Same <input checked="" type="checkbox"/> Lower (Additional info within "Notes" section above)



A12: VERIFIED DATA - PERFORMANCE QUALITY INDICATOR #12

VERIFIED DATA

For Informational Use (Not Scored at This Time)

The information provided on verified data is to determine the charter school’s verified data implementation. The renewal criteria for charter schools identified by the CDE as Middle and Low performing shall include the consideration of clear and convincing data, demonstrated by verified data, showing either of the following: (a) The charter school achieved measurable increases in academic achievement, as defined by at least one year’s progress for each year in school, or (b) Strong postsecondary outcomes, as defined by college enrollment, persistence, and completion rates equal to similar peers (Ed. Code, § 47607(c)(2)(B).

The information below is based on charter school’s self-reported data and responses to questions provided prior to the oversight visit.

The State Board of Education (SBE), at its November 2020 meeting, approved the criteria to define verified data and the list of valid and reliable assessments and measure of postsecondary outcomes (<https://www.cde.ca.gov/sp/ch/verifdata.asp>). The charter school identified the academic progress indicator(s) (verified data) used by the charter school during the 2021-2022 academic school year.

- | | | |
|---|--|--|
| <input type="checkbox"/> Adaptive, Diagnostic Assessment of Mathematics (ADAM)/Diagnostic Online Math Assessment (DOMA) by Let’s Go Learn | <input type="checkbox"/> FastBridge by Illuminate | <input type="checkbox"/> RAPID by Lexia Learning |
| <input type="checkbox"/> California Assessment of Student Performance and Progress (English Language Arts/Literacy and Mathematics) (methodology mutually agreed upon by the chartering authority and charter school) | <input type="checkbox"/> iReady by Curriculum Associates | <input type="checkbox"/> Reading Inventory by Houghton Mifflin Harcourt |
| <input type="checkbox"/> Diagnostic Online Reading Assessment (DORA) by Let’s Go Learn | <input type="checkbox"/> Math Inventory by Houghton Mifflin Harcourt | <input type="checkbox"/> SAT Suite by College Board |
| <input checked="" type="checkbox"/> easyCBM by Riverside Insights | <input type="checkbox"/> mCLASS by Amplify | <input type="checkbox"/> Star Assessments by Renaissance |
| <input type="checkbox"/> ELPAC by Educational Testing Service | <input type="checkbox"/> Measures of Academic Progress by NWEA | <input type="checkbox"/> The school is not using a state approved verified data (see Verified Data Notes below): |



LOS ANGELES UNIFIED SCHOOL DISTRICT

CHARTER SCHOOLS DIVISION

Verified Data Assessment	Grade Levels Assessed	95% Participation Rate (Met/Not Met)	Frequency of Administration of Verified Data Assessment
1. Easy CBM ELA	1-8	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	3 x year
2. Easy CBM Math	1-8	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	3 x year

If the charter school did not meet the 95% participation rate, the charter school provided the following plan to address participation rate as follows:
N/A

The charter school disaggregated student performance data for the subgroups: Yes No

If applicable, the charter school provided disaggregated student performance data for the following subgroups:

- | | | |
|--|---|--|
| <input checked="" type="checkbox"/> American Indian or Alaska Native | <input type="checkbox"/> Foster Youth | <input checked="" type="checkbox"/> Students with Disabilities |
| <input checked="" type="checkbox"/> Asian | <input type="checkbox"/> Homeless | <input checked="" type="checkbox"/> Two or More Races |
| <input checked="" type="checkbox"/> Black or African American | <input checked="" type="checkbox"/> Latino | <input checked="" type="checkbox"/> White |
| <input checked="" type="checkbox"/> English Learner | <input checked="" type="checkbox"/> Native Hawaiian or Pacific Islander | |
| <input checked="" type="checkbox"/> Filipino | <input checked="" type="checkbox"/> Socioeconomically Disadvantaged | |

The charter school provided the following description of how the data submitted shows growth in student achievement:
“As documented in the comments section of the SIDAT, the data does not show growth generally due to the effects of distance learning.”

The charter school affirmed that the assessments were administered as intended, consistent with the test’s publishers’ administration and test security procedures:
 Yes No

School leadership shared the following regarding administration of assessments, “The assessments were administered as intended in Spring of 2021 and this school year since students were back on campus starting in March 2021. However, OCS is not able to verify that they were administered as intended during distance learning in Spring 2020 and through Fall and Winter 2021 as students took them from home. While teachers did their best to teach the students the protocols and to train parents when students needed support, teachers were not able to verify that the process was followed with absolute fidelity in these circumstances. Students



took the Easy CBM assessments on their devices via the internet while at home during designated times under the supervision of their teacher on zoom. When in person, students took the assessments in the classroom online on devices under the supervision of the teacher.”

HIGH SCHOOLS ONLY:

The California Department of Education (CDE) adopted postsecondary indicator(s) data to be used by the school to verify postsecondary outcomes “as defined by college enrollment, persistence, and completion... equal to similar peers.” The school is using the following data source(s):

- California Department of Education DataQuest College-Going Rate
- National Student Clearinghouse Student Tracker
- University of California Undergraduate Graduation Rates
- California State University Enrollment Dashboard Student Origin
- University of California Admissions by School Source
- The school is not using a state identified data sources (see Verified Data Notes below):
- Cal-PASS Plus High School to Community College Transition Report

The postsecondary data includes the results of at least 95% percent of eligible students: Yes No

The postsecondary data includes the number of missing or non-participating students: Yes No

The charter school provided evidence of comparing the data to similar peers (which may include, but not limited to, similar demographics, pupil subgroups, first-time college attendance, or other similar circumstances and if not available, comparison to statewide data): Yes No

Verified Data Notes:

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 2021-2022 (For Informational Purposes Only)

The CSD reviewed the Local Control Accountability Plan.

All requested template information and descriptions were provided:	Sources of Evidence
<ul style="list-style-type: none"> <input checked="" type="checkbox"/> LCFF Budget Overview for Parents <input checked="" type="checkbox"/> Annual Update for the 2019-2020 LCAP Year <input checked="" type="checkbox"/> Annual Update for the 2020-2021 Learning Continuity and Attendance Plan <input checked="" type="checkbox"/> 2021-2024 Plan Summary <input checked="" type="checkbox"/> Stakeholder Engagement <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"/> Expenditures Tables 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Local Control Accountability Plan (B2.7) <input checked="" type="checkbox"/> Board Agenda and Minutes (B2.7)

Notes:

None



ORGANIZATIONAL MANAGEMENT, PROGRAMS, AND OPERATIONS	RATING*
Summary of School Performance	4

Areas of Demonstrated Strength and/or Progress

- **O1: SCHOOL SAFETY PLAN AND PROCEDURES:** The school has a highly 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. During classroom walkthroughs, on the day of the oversight visit, emergency supplies were available and included first aid kits, flashlights, emergency provisions, etc. Documents provided evidence of: 1) A comprehensive Safe Evacuation Plan and SERT (School Emergency Response Team) Roles; 2) Calendar of scheduled earthquake, fire, and lock down drills, emergency supply lists, Responsibility Matrix; 3) record of maintaining unexpired Epi-Pens; 4) Providing needy students with one adequate free or reduced priced meal each day; and, 5) Automated External Defibrillator (AED) photo.
- **O3: IMPLEMENTATION OF THE EDUCATIONAL PROGRAM –** 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. The scope of classroom observations was based on areas of focus identified in consultation with charter school leadership. The three focus areas for classroom observations were: 1) Arts-integrated instruction – art supplies were available for painting, student work samples and artwork were posted throughout classrooms (i.e., lesson books, physics projects), artwork created by teachers was also posted, student were observed engaging in live theatrical performances and rehearsing for future performances; 2) Cooperative learning – students were observed sitting in table pods and engaging in small group work, students were observed engaging in partner work as well as problem-solving in teams; 3) Trauma-informed practices – daily schedules were posted on boards within the classrooms, students were observed engaging in a grounding activity (rhythmic routine), teachers were observed providing positive reinforcement, student created self-care posters were observed in the classroom. The school received a 6-year WASC accreditation status with a mid-cycle progress report through June 30, 2027.
- **O7: PROFESSIONAL DEVELOPMENT -** The school has fully 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. Documents in Binder 3 provided evidence of a year-long professional development plan based on data/identified needs with topics including, but not limited to: Understanding Waldorf Education, Cyber Civics, Compassionate Campus, Circle Work, Child Development, Strategies for Differentiation.

Areas Noted for Further Growth and/or Improvement

Corrective Action Required

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

Notes:



***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 2021-2022) prior to employment; and/or failed to obtain DOJ clearance certification, as appropriate, from a vendor; 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.*

O1: SCHOOL SAFETY PLAN AND PROCEDURES - QUALITY INDICATOR #1

The school has a system in place to ensure:

- A current site-specific Certificate of Occupancy or equivalent that authorizes the current use of the site
- A current site-specific comprehensive Health, Safety, and Emergency Plan is completed
(Note: for co-locations, the charter school adheres and complies with the District school's Integrated Safe School Plan)
- A visitor's policy is visible in the school's main office and Parent-Student Handbook
- Documentation of student immunizations
- Documentation of health screenings per applicable law and terms of the charter (vision screenings upon school entry and every third year thereafter through grade 8 and hearing screenings are mandated in kindergarten/first grade and in second, fifth, eighth, tenth/eleventh grade and upon first school entry)
- A Board adopted Pupil Suicide Prevention Policy (grades 1-6 and/or grades 7-12, as applicable), as outlined in Ed. Code, § 215
- Needy students receive one nutritionally adequate free or reduced priced meal each school day, as outlined in Ed. Code, § 47613.5
- 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, § 35179.4 and 35179.6
- For schools serving grades 7-12, Student ID cards have the phone number of the National Suicide Prevention Lifeline printed on at least one side, as outlined in Ed. Code, § 215.5

Rubric	Sources of Evidence
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Performance	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> The school has a highly 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 type="checkbox"/> The school has a well-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 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 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 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10a) <input type="checkbox"/> Certificate of Occupancy or equivalent (B3.2a) <input checked="" type="checkbox"/> Student immunization (B3.2b) <input checked="" type="checkbox"/> Health screening (B3.2b) <input checked="" type="checkbox"/> Comprehensive Health, Safety, and Emergency Plan (B3.1b) <input checked="" type="checkbox"/> Evacuation route maps (B3.1b) <input checked="" type="checkbox"/> AED (schools with an interscholastic athletic program) (B3.2e) <input checked="" type="checkbox"/> Student ID card printed with the National Suicide Prevention Lifeline phone number (B3.2f) <input checked="" type="checkbox"/> Board adopted policy on pupil suicide prevention (grades K-6) (B3.1g) <input checked="" 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"/> Visitor's Policy (B3.1a) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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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 of the epi-pen, per applicable laws
- Pupil Suicide Prevention and Awareness Training (as applicable)

	Rubric	Sources of Evidence
Performance	<input checked="" type="checkbox"/> The school has a highly 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 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 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 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"/> Documentation of emergency drills and training (B3.1c) <input checked="" type="checkbox"/> Provision and location of onsite emergency supplies (B3.1b) <input checked="" type="checkbox"/> Child abuse mandated reporter training documentation (B3.1d and B3A.5) <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, g and B3A.5) <input checked="" type="checkbox"/> Epi-pen and training (B3.2c) <input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2021-2022</i> (“ESSA Grid”) (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 progress towards annual goals for all students and subgroups the school serves consistent with educational outcomes detailed in the California School Dashboard
- 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	<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 <input type="checkbox"/> The school has substantially 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	<input checked="" type="checkbox"/> Implementation of an educational program serving all grade levels approved to be served per charter (B3.3i, j, k) <input checked="" type="checkbox"/> California State Content Standards-based instructional program (B3.3a) <input checked="" type="checkbox"/> LCAP (B3.3b) <input type="checkbox"/> Technology readiness to administer CAASPP assessments (B3.3c) *new schools only <input checked="" type="checkbox"/> WASC accreditation (B3.3d) <input type="checkbox"/> UC Doorways course approval documentation (B3.3e) <input checked="" type="checkbox"/> Professional development documentation (B3.4c) <input checked="" type="checkbox"/> Classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



O4: MEETING THE NEEDS OF ALL STUDENTS; SUBGROUP DATA ANALYSIS - QUALITY INDICATOR #4

<p><i>The school has a system in place to ensure:</i></p> <ul style="list-style-type: none"> • Implementation of differentiated instructional strategies and approaches described in the charter designed to meet the learning needs of all students, including all numerically significant subgroups 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) • A staff person is designated to assist and support foster youth/students experiencing homelessness 		
	Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <input type="checkbox"/> The school has fully implemented and monitors the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and modifies instruction based on data analysis <input checked="" type="checkbox"/> The school has substantially implemented and monitors the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and generally modifies instruction based on data analysis <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 subgroups, and partially modifies instruction based on data analysis <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 subgroups, and does not consistently modify instruction based on data analysis 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Standards-based instructional program (B3.3a) <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (B3.4c) <input checked="" type="checkbox"/> Intervention and support for all students, including but not limited to foster youth, low-income, English Learners, students with disabilities, at-risk students, and high performing students (B3.3i) <input checked="" type="checkbox"/> Implementation of the school’s English Learner Master Plan (B3.3i) <input checked="" type="checkbox"/> Implementation of a data analysis system (B2.1 and B2.6) <input checked="" type="checkbox"/> Internal assessment and analysis documentation (e.g., School Internal Assessment Data Report or equivalent) (B2.6) <input checked="" type="checkbox"/> Foster youth/students experiencing homelessness designee <input checked="" type="checkbox"/> Classroom 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	<input type="checkbox"/> The school has a highly 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 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 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 checked="" type="checkbox"/> Not Applicable - Charter school participates in LAUSD's Option 1 SELPA	<input type="checkbox"/> Parent-Student Handbook(s) (B1.10a) <input type="checkbox"/> District Validation Review (DVR) (B3.4a) <input type="checkbox"/> Self-Review Checklist (B3.4a) <input type="checkbox"/> Welligent reports and/or other documentation, including from the Division of Special Education (B3.4a) <input type="checkbox"/> Professional development documentation (B3.4c) <input type="checkbox"/> Intervention and support for students with disabilities (B3.3i) <input type="checkbox"/> Consultation with Charter Operated Programs office <input type="checkbox"/> Other special education documentation (B3.4a) <input type="checkbox"/> Classroom observation <input type="checkbox"/> Discussion with school leadership <input type="checkbox"/> MOU Non-LAUSD SELPA <input type="checkbox"/> Other: (Specify)



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

<p><i>The school has a school climate and schoolwide student discipline system in place to ensure that the school's practices:</i></p> <ul style="list-style-type: none"> Align with the 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 subgroups Minimize chronic absenteeism for all students and student subgroups 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 highly 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 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 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 (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (B3.4c) <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 (B3.4b) <input checked="" type="checkbox"/> Implementation of tiered behavior intervention, such as SST/COST (B3.4b) <input checked="" type="checkbox"/> Implementation of alternatives to suspension (B3.4b) <input checked="" type="checkbox"/> Implementation of schoolwide positive behavior support system (B3.4b) <input checked="" type="checkbox"/> Data monitoring (B3.4b) <input checked="" type="checkbox"/> LAUSD Office of Data & Accountability's Data Set for suspension, expulsion, disproportionality, and chronic absenteeism (B2.1) <input checked="" type="checkbox"/> Chronic absenteeism rates <input checked="" type="checkbox"/> Implementation of procedures for preventing acts of bullying, including cyberbullying (B3.4b) <input type="checkbox"/> Stakeholder focus group <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



O7: PROFESSIONAL DEVELOPMENT - QUALITY INDICATOR #7

<p>The school:</p> <ul style="list-style-type: none"> • 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 fully 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 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 (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (e.g. professional development year-long plan agendas, and sign-ins) (B3.4c) <input checked="" type="checkbox"/> Professional development training materials (B3.4c) <input checked="" type="checkbox"/> System to assess professional development needs (B3.4c) <input type="checkbox"/> Interview of teachers and/or other staff <input checked="" type="checkbox"/> Discussion with school leadership <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
- Engages in communication that notifies parents, teachers, pupils and other stakeholders of the process for resolving concerns, including how they may contact board members, and supports students, families, and other stakeholders in effectively resolving concerns

	Rubric	Sources of Evidence
Performance	<input checked="" type="checkbox"/> The school has a highly developed system for stakeholder engagement, including gathering input, encouraging involvement, sharing information, and resolving concerns <input type="checkbox"/> The school has a well-developed system for stakeholder engagement, including gathering input, encouraging involvement, sharing information, and resolving concerns <input type="checkbox"/> The school has a partially developed system for stakeholder engagement, including gathering input, encouraging involvement, sharing information, and resolving concerns <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"/> Parent-Student Handbook (B1.10a) <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Documentation of SSC and ELAC meetings (e.g., calendars, agendas, minutes, roster, and sign-in) (B3.4d) <input checked="" type="checkbox"/> Stakeholder consultation (B3.4d) <input checked="" type="checkbox"/> Parent/stakeholder involvement and engagement (B3.4d) <input checked="" type="checkbox"/> Communication to parents and other stakeholders of complaint resolution process(es) (B3.4d) <input checked="" type="checkbox"/> School website (B3.4e) <input type="checkbox"/> Stakeholder focus group <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



O9 TRANSPARENCY FOR STAKEHOLDERS- QUALITY INDICATOR #9

The school's documents that are available both manually and electronically serve as a vehicle for transparency through its displays and provision of information.

- Information is easily accessible to the public and school stakeholders, and is presented in English and applicable languages as required by law
- Applicable categories described in Charter School Transparency Resolution
- UCP and all complaint procedures
- Title IX information in accordance with Ed. Code, § 221.61**
- Suicide Prevention policy in accordance with Ed. Code, § 215**
- 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
- Ensure that specified information on bullying and harassment prevention is readily accessible in a prominent location on the LEA's existing website in a manner that is easily accessible to parents or guardians of pupils, in accordance with Ed. Code, § 234.1 et seq.**
- Provides all stakeholders with appropriate, accessible, and relevant information about individual student and schoolwide academic progress and performance
- 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 (**high schools only**)

*** Indicates that the policy must be posted on website.

Rubric	Sources of Evidence
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Performance	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> The school has a highly 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 well-developed 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"/> Review of the availability of information to the public/stakeholders (B3.4e) for: <ul style="list-style-type: none"> <input checked="" type="checkbox"/> LCAP <input checked="" type="checkbox"/> UCP Procedure and Forms <input checked="" type="checkbox"/> Complaint Procedure and Forms <input checked="" type="checkbox"/> Title IX Information <input checked="" type="checkbox"/> Suicide Prevention and Awareness <input checked="" type="checkbox"/> Financial Audit <input checked="" type="checkbox"/> Student Demographics <input checked="" type="checkbox"/> Student Achievement Information <input checked="" type="checkbox"/> Sharing accessible and relevant information about individual student and schoolwide academic progress and performance with all stakeholders as appropriate (B3.4e) <input type="checkbox"/> Parents are informed about transferability of courses/course credit and eligibility to meet A-G requirements (B3.4e) <input checked="" type="checkbox"/> Provision of stakeholder access to school's approved charter (B3.4e) <input checked="" type="checkbox"/> Informing parents/guardians of human trafficking prevention resources (grades 6-12) (B3.4e) <input checked="" type="checkbox"/> Notification of access to available mental health services (B3.4e) <input checked="" type="checkbox"/> Specified information on bullying and harassment prevention (B3.4e) <input checked="" type="checkbox"/> School website (B3.4e) <input type="checkbox"/> Other: (Specify)
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O10: EVALUATION OF SCHOOL STAFF - QUALITY INDICATOR #10

<p><i>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:</i></p> <ul style="list-style-type: none"> • Evaluation procedures with clear performance standards for all school-based staff, including but not limited to administrators, certificated staff, and classified staff • Evaluation tool for all school-based staff, including but not limited to administrators, certificated staff, and classified staff 	
Rubric	Sources of Evidence
Performance	<p><input checked="" type="checkbox"/> The school has a highly 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</p> <p><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</p> <p><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</p> <p><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</p>
	<p><input checked="" type="checkbox"/> Evaluation procedures with clear performance standards for all school-based staff, including but not limited to administrators, certificated staff, and classified staff (B3.4f)</p> <p><input checked="" type="checkbox"/> Evaluation tool for all school-based staff, including but not limited to administrators, certificated staff, and classified staff (B3.4f)</p> <p><input type="checkbox"/> Discussion with school leadership</p> <p><input type="checkbox"/> Other: (Specify)</p>



O11: CLEARANCES AND CREDENTIALING COMPLIANCE - QUALITY INDICATOR #11

<i>The school is in compliance with applicable law and the terms of its approved charter regarding clearances and credentialing:</i>	
<ul style="list-style-type: none"> • All certificated staff are fully credentialed, including EL authorizations, and appropriately assigned as authorized by their credentials at all times • Individuals employed in a teaching position during 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 charter school maintains appropriate assignments and monitoring throughout the year and addresses Exceptions (and makes Determinations, as appropriate) in CalSAAS during the CTC-identified annual window. • Charter school identifies its charter user(s) who participate in CTC trainings as well as those through LACOE and/or LAUSD, and they establish internal processes that address not only the CalSAAS monitoring, but also the accurate submission of CALPADS Codes as they relate to the CalSAAS Determinations. • 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 type="checkbox"/> The school has fully implemented and continually monitors systems and procedures that maintain 100% compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements at all times <input checked="" 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 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 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"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2021-2022</i> form (“ESSA Grid”) (B3A.1a) <input checked="" type="checkbox"/> Human Resources policies and procedures regarding ESSA qualifications and credentialing requirements <input checked="" type="checkbox"/> CalSAAS detail and summary reports; HR procedures for the CalSAAS; List of CalSAAS users who actively engage in the assignment monitoring process <input checked="" type="checkbox"/> Staff rosters and school master schedule (B3A.1b and 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 certifications (B3A.6) <input checked="" type="checkbox"/> Volunteer (TB) risk assessment/clearance certification (B3A.7) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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Progress on LAUSD Board of Education Benchmarks and/or MOU related to ORGANIZATIONAL MANAGEMENT (if applicable):

BOARD OF EDUCATION REPORT 273 – 17/18 January 9, 2018
 BENCHMARK: *The Charter School will submit an annual written report to the Charter Schools Division by December 1st of each year of the charter term that provides evidence and data of its community outreach efforts and outcomes to increase student diversity for its significant subgroups, which includes Latino, and Socioeconomically Disadvantaged, based on official student information.*

- **PARTIALLY MET:** Ocean Charter's numerically significant subgroups, including Latino and SED, demonstrated the following student population percentages when comparing 2019-2020 to 2020-2021: Hispanic/Latino went from 24.6% to 25.2%; Two or More Races went from 16% to 15.2%; SED went from 21.8% to 18.9%.



Annual Performance-Based Oversight Visit Report

Location Code: **5962**
 School Name: **Ocean Charter**
 FY Start Date: **2004-05**

Charter #: **0569**
 CDS Code: **1964733 0102335**

5962 Ocean Charter	2018-2019					2019-2020					2020-2021				
	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		0	20,527,665	17,569,317	379,590		2,920,547	3,122,134	4,415,779	4,415,798		289,876	225,167	2,227,972	301,701
Current Assets		0	21,180,372	18,201,085	18,201,085		5,912,080	3,635,674	5,127,845	5,127,864		1,373,769	1,556,252	3,473,421	1,489,710
Fixed and Other Assets		0	53,071,282	52,794,821	52,794,820		74,763,644	73,308,919	72,914,379	72,914,379		78,080,994	78,705,349	77,345,938	58,484,926
Total Assets		0	74,251,654	70,995,906	70,995,905		80,675,724	76,944,592	78,042,224	78,042,243		79,454,763	80,261,601	80,819,359	59,974,636
Deferred Outflow		0	0	0	0		0	0	0	0		0	0	0	0
Current Liabilities		0	21,165,801	18,790,146	18,790,145		2,672,245	4,329,413	4,925,019	4,280,039		2,822,722	2,137,999	2,358,192	2,637,520
Other Long Term Liabilities		0	10,300,000	10,300,000	10,300,000		10,300,000	10,300,000	10,954,999	11,600,000		10,367,386	11,094,053	11,525,158	11,188,376
Unfunded OPEB Liabilities/Deferred Inflow		0	0	0	0		0	0	0	0		0	0	0	0
Total Liabilities		0	31,465,801	29,090,146	29,090,145		12,972,245	14,629,414	15,880,018	15,880,039		13,190,108	13,232,052	13,883,350	13,825,896
Net Assets		50,049,987	42,785,853	41,905,760	41,905,760		67,703,479	62,315,179	62,162,206	62,162,204		66,264,655	67,029,549	66,936,009	46,148,740
Total Revenues	36,793,581	32,776,140	25,530,534	24,623,476	24,910,813	34,633,182	31,811,220	26,445,280	25,886,236	26,134,410	12,718,692	11,754,793	11,938,334	10,964,728	11,154,446
Total Expenditures	5,867,294	5,892,864	5,910,343	5,883,377	6,170,712	6,010,943	6,013,501	6,035,862	5,629,790	5,877,966	6,431,328	7,652,344	7,070,989	6,190,925	6,390,573
Net Income / (Loss)	30,926,287	26,883,276	19,620,191	18,740,099	18,740,101	28,622,239	25,797,719	20,409,418	20,256,446	20,256,444	6,287,364	4,102,449	4,867,345	4,773,803	4,763,873
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	30,926,287	26,883,276	19,620,191	18,740,099	18,740,101	28,622,239	25,797,719	20,409,418	20,256,446	20,256,444	6,287,364	4,102,449	4,867,345	4,773,803	4,763,873
Net Assets, Beginning	25,437,079	23,166,712	23,165,662	23,166,712	23,165,659	42,785,853	41,905,760	41,905,760	41,905,760	41,905,760	62,315,179	62,162,206	62,162,206	62,162,206	62,162,204
Adj. for restatement / Prior Yr Adj	0	0	0	(1,050)	0	(3,780,089)	0	0	0	0	(1,796,430)	0	(2)	0	(20,777,337)
Net Assets, Beginning, Adjusted	25,437,079	23,166,712	23,165,662	23,165,662	23,165,659	39,005,764	41,905,760	41,905,760	41,905,760	41,905,760	60,518,749	62,162,206	62,162,204	62,162,206	41,384,867
Net Assets, End	56,363,366	50,049,987	42,785,853	41,905,760	41,905,760	67,628,003	67,703,479	62,315,179	62,162,206	62,162,204	66,806,113	66,264,655	67,029,549	66,936,009	46,148,740

5962 Ocean Charter	Audited Financials					2021-2022				
	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Cash and Cash Equivalents	23,194,550	379,590	4,415,798	301,701	0		739,804	796,674	0	0
Current Assets	23,634,004	18,201,085	5,127,864	1,489,710	0		1,506,387	1,618,132	0	0
Fixed and Other Assets	30,333,438	52,794,820	72,914,379	58,484,926	0		77,608,963	56,832,464	0	0
Total Assets	53,967,442	70,995,905	78,042,243	59,974,636	0		79,115,350	58,450,596	0	0
Deferred Outflow	0	0	0	0	0		0	0	0	0
Current Liabilities	24,402,219	18,790,145	4,280,039	2,637,520	0		514,794	651,784	0	0
Other Long Term Liabilities	6,399,564	10,300,000	11,600,000	11,188,376	0		11,228,374	11,228,373	0	0
Unfunded OPEB Liabilities/Deferred Inflow	0	0	0	0	0		0	0	0	0
Total Liabilities	30,801,783	29,090,145	15,880,039	13,825,896	0		11,743,168	11,880,157	0	0
Net Assets	23,165,659	41,905,760	62,162,204	46,148,740	0		67,372,182	46,570,439	0	0
Total Revenues	23,618,851	24,910,813	26,134,410	11,154,446	0	6,278,769	8,289,016	8,189,056	0	0
Total Expenditures	5,643,383	6,170,712	5,877,966	6,390,573	0	7,735,266	7,842,910	7,767,356	0	0
Net Income / (Loss)	17,975,468	18,740,101	20,256,444	4,763,873	0	(1,456,497)	446,106	421,700	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	17,975,468	18,740,101	20,256,444	4,763,873	0	(1,456,497)	446,106	421,700	0	0
Net Assets, Beginning	5,190,191	23,165,659	41,905,760	62,162,204	0	67,029,549	66,936,009	66,936,009	0	0
Adj. for restatement / Prior Yr Adj	0	0	0	(20,777,337)	0	991,356	(9,933)	(20,787,270)	0	0
Net Assets, Beginning, Adjusted	5,190,191	23,165,659	41,905,760	41,384,867	0	68,020,905	66,926,076	46,148,739	0	0
Net Assets, End	23,165,659	41,905,760	62,162,204	46,148,740	0	66,564,408	67,372,182	46,570,439	0	0



FISCAL OPERATIONS		RATING																														
<p>You have been assessed by the Fiscal Oversight team and you are receiving the rating of 2, <i>Developing</i>.</p> <p>According to the CSD’s Fiscal Operations Rubrics, the highest fiscal rating that schools with audit findings reported in the most current independent audit report is a “2.” To earn a fiscal rating of a 4, schools must have the two most current audits that show no material weaknesses, deficiencies and/or findings, and no discrepancies cited in the Areas Noted for Further Growth and/or Improvement. Ocean Charter School’s (OCS) independent audit report for the fiscal year ended 2020-2021 reported findings/material weakness pertaining to financial statement relating to the school’s year-end closing. Please see further details in the Areas Noted for Further Growth and/or Improvement section below.</p> <p>Other circumstances and information could influence the rating and are noted in this evaluation.</p> <p>Ocean Charter School’s fiscal condition has been positive since the 2017-2018 fiscal year. According to the 2020-2021 independent audit report, the school had positive net assets of \$46,148,740 and net income of \$4,763,873. The 2021-2022 Second Interim projects positive net assets of \$46,570,440 and net income of \$421,700.</p> <p>Areas of Demonstrated Strength and/or Progress:</p> <p>1. The school’s fiscal condition is positive.</p>		2																														
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th style="text-align: center;">2017-2018 (Audited Actuals)</th> <th style="text-align: center;">2018-2019 (Audited Actuals)</th> <th style="text-align: center;">2019-2020 (Audited Actuals)</th> <th style="text-align: center;">2020-2021 (Audited Actuals)</th> <th style="text-align: center;">2021-2022 (Second Interim)</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Net Assets</td> <td style="text-align: right;">\$23,165,659</td> <td style="text-align: right;">\$41,905,760*</td> <td style="text-align: right;">\$62,162,204*</td> <td style="text-align: right;">\$46,148,740*</td> <td style="text-align: right;">\$46,570,440</td> </tr> <tr> <td style="text-align: center;">Net Income/Loss</td> <td style="text-align: right;">\$17,975,468</td> <td style="text-align: right;">\$18,740,101*</td> <td style="text-align: right;">\$20,256,444*</td> <td style="text-align: right;">\$4,763,873*</td> <td style="text-align: right;">\$421,700</td> </tr> <tr> <td style="text-align: center;">Transfers In/Out</td> <td style="text-align: center;">\$0</td> </tr> <tr> <td style="text-align: center;">Prior Year Adjustment(s)</td> <td style="text-align: center;">\$0</td> <td style="text-align: center;">\$0</td> <td style="text-align: center;">\$0</td> <td style="text-align: right;">(\$20,777,337)**</td> <td style="text-align: center;">\$0</td> </tr> </tbody> </table> <p>* See Item 31 in the Notes section below for further information regarding Ocean Charter School’s Proposition 1D Grant. ** See Item 32 in the Notes section below for further information.</p>				2017-2018 (Audited Actuals)	2018-2019 (Audited Actuals)	2019-2020 (Audited Actuals)	2020-2021 (Audited Actuals)	2021-2022 (Second Interim)	Net Assets	\$23,165,659	\$41,905,760*	\$62,162,204*	\$46,148,740*	\$46,570,440	Net Income/Loss	\$17,975,468	\$18,740,101*	\$20,256,444*	\$4,763,873*	\$421,700	Transfers In/Out	\$0	\$0	\$0	\$0	\$0	Prior Year Adjustment(s)	\$0	\$0	\$0	(\$20,777,337)**	\$0
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Areas Noted for Further Growth and/or Improvement:

1. 2020-2021 Audited Financial Statement Finding:

Ocean Charter School’s 2020-2021 independent audit report noted the following material weakness regarding Year-End Closing:

*“Five Digit Code AB 3627 Finding Type
300000 Internal Control
2020-001 30000 - Year End Closing (Material Weakness)*

Criteria or Specific Requirement

Verify that the Organization has an appropriate internal control system which would allow management or employees, in the normal course of performing their assigned functions, to prevent or detect and correct misstatements on a timely basis, whether due to error or fraud.

Condition

During our audit of the financial statements, we were informed that a property was transferred to the authorizer, yet was still on the balance sheet of the Organization. We also noted costs of issuance still capitalized, these costs should have been fully amortized at the time the related debt was paid in full. These misstatements were not identified during the year-end closing process.

Questioned cost

There were no questioned costs associated with the condition noted

Context

The condition was identified through review of the Organization records related to the financial accounts balances.

Effect

A restatement of the financial statements was needed to correct the misstatement. Entries were posted to correct property and costs of issuance as well as the beginning balance.

Cause

This was an oversight that was not detected by the Organization subsequent to the transfer of the property to the authorizer and the early pay off of the debt.

Repeat Finding

No

*Recommendation*

To ensure accurate reporting prior to closing the financial statements, procedures should be established to ensure that property and equipment accounts are recorded correctly, and all transactions are properly accounted for at the time of the occurrence.

Corrective Action Plan and Views of Responsible Officials

In March 2018, OCS transferred title to its property to LAUSD in exchange for over \$30 million from LAUSD in order for OCS to begin construction of a new school facility on that property and for OCS to receive a 40-year rent-free lease to the property from LAUSD. This transfer was extensively negotiated and documented by both parties, with the full input and support of OCS's back-office provider, ExED. The property was under construction for the next three years and was not occupied by OCS until its partial occupancy in April 2021, when in-person instruction resumed during the Covid pandemic. This development of a new site for an independent charter school like OCS was remarkable in the level of involvement and resources ultimately devoted to it by both the State of California and LAUSD (over \$75 million).

In June 2021, with construction of the new facility virtually complete, ExED sought to determine how to capitalize the entire construction project. ExED was advised that the value of the land should have been removed from OCS's books at the time of the March 2018 transfer, with OCS's books also reflecting the value of the new 40-year leasehold interest.

The three-year delay in adjusting OCS's books to reflect the property transfer is the result of unique circumstances and not the result of a weak or flawed internal control system by OCS. In the seventeen-year history of OCS, OCS has never had a finding of a material weakness or other flaws in its internal control system. Nor does the current finding identify any issues relating to OCS's ongoing operations of a school. Rather, it relates only to a one-time transaction that is unprecedented in the history of the school and that is highly unlikely to ever be repeated. Moreover, given the complexity of the property transaction and construction, as well as the multiple financing arrangements entered into with LAUSD and the State, OCS necessarily and reasonably relied on a number of advisors to guide it through the process. LAUSD reviewed OCS's books on, at least, an annual basis, and it did not question the accuracy of OCS's accounting for the value of the property on its balance sheet. None of the numerous individuals and entities involved in preparing and reviewing OCS's books over the three-year period identified the accounting discrepancy, despite ample knowledge of the transaction and access to documents with further information on the transaction. As a result, OCS reasonably believed that a transaction that was well-known to all parties and part of a process that received repeated scrutiny had been accounted for correctly. When the problem was nevertheless identified, OCS and ExED promptly moved to correct the issue.

OCS has been, and will remain, committed to strengthening the management and review of its financial books on an ongoing basis to ensure that its books remain accurate and in accord with all relevant accounting standards."

In March 2022, the CSD met with OCS to get further understanding of the material weakness described above and how OCS' auditors were not made aware of OCS property transaction until the 2020-2021 audit. Per conversations and email communications between OCS and the CSD at the March 2022 meeting, OCS stated: "The auditors were in fact aware of the property transaction as they had been auditing OCS throughout the entire transaction and had been supplied with detailed documents, including the Board agenda and meeting minutes documenting the transfer as well as the lease agreement." Additionally, OCS stated: "...OCS communicated pertinent



information with details with the auditor each year of the entire process...OCS can speak to all the documents that were provided to the auditor as well as to the detailed information shared with them about the complex transaction, but cannot explain how the auditors missed the oversight for three year.” Furthermore, OCS clarified that the advisors that they have worked with through the process are their back-office service provider, project managers from the construction vendor, independent contracted auditors, and LAUSD facilities division. OCS understands that the CSD fiscal oversight staff are not auditors and that oversight work of the CSD is limited in scope. OCS understands that ultimately it is school management who is responsible for the preparation and fair presentation of the school’s financial statements in accordance with accounting principles generally accepted in the United States of America.

The CSD will continue to monitor this issue through oversight, including reviewing Ocean Charter School’s 2021-2022 audit report for implementation status.

The governing board and leadership team of the charter school are responsible for managing the operations of the school. Thus, the school’s action plans concerning the above-noted findings and observations should 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. 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. Late Fees:

Based on the CSD’s review of the school’s check register for the period spanning from December 2020 through December 2021, bank statements, and related supporting documentation, a sample of 28 checks and 2 bank transactions (related to vendor payments) were selected for further review. Upon review of the invoice for Check #P006181, in the amount of \$738.16, dated 10/12/2021 and made payable to SEMA, INC., the CSD noted four checks provided by the school referenced late fees totaling \$188.76 in the aggregate. This issue of late fees was noted under “Other Observations” in the CSD’s 2020-2021 Annual Performance-Based Oversight Visit Report. In response to the CSD’s previous oversight observations, the school had committed to addressing this issue by resuming to work in the collaborative working environment, in-person at school, as opposed to working from home due to the pandemic; and to also update its mailing address with the United States Postal Service from its previous location to the current one. These late fees are summarized below.

Item #	Check #	Vendor Name	Posting Date	Check Amount	Late Fees	Transaction Description
1	E000367	SEMA, INC.	5/12/2021	\$516.74	\$47.19	COPY MACHINE MNTHLY LEASE - NURSE ROOM



2	E000476	SEMA, INC.	6/10/2021	\$649.80	\$47.19	03/13 - 04/12/21 - COPY MACHINES LEASE
3	E000619	SEMA, INC.	7/13/2021	\$772.14	\$47.19	04/13 - 05/12/21 - COPY MACHINES LEASE
4	E000988	SEMA, INC.	9/3/2021	\$698.00	\$47.19	05/13/21-06/12/21 - COPIER LEASE
			TOTAL	\$2,636.68	\$188.76	

In response to the CSD’s observations above, OCS stated: “...SEMA registered for [c]redit [c]ard payments and apply payment to corresponding invoices. [Ocean Charter’s] [b]usiness manager discussed the issue with [SEMA] representative and requested that payments be reissued via check and [Ocean Charter] be removed from payment method per their request.” When asked whether there are current outstanding late fees to-date, Excellent Education Development (ExED), Ocean Charter’s back-office service provider, indicated that SEMA, INC.’s February 2022 invoice, which was due on 3/13/2022 and paid on 3/9/2022, had no late fees, but its March 2022 invoice had a late fee, which ExED stated that SEMA might not have received the payment on time. Furthermore, ExED stated: “[The school’s Business Coordinator] will be reaching out to SEMA to discuss a refund of the previous late fees that were caused by SEMAs selected method of payment. Additionally, to discuss if SEMA is able to change the payment terms to Net30.”

The CSD recommends that the school implement procedures to track all recurring and non-recurring invoices and billing statements and ensure that all vendors are paid timely, to prevent the school from incurring additional late fees in the future. Additionally, the CSD recommends that the school continues to explore alternative options that will ensure all invoices are processed timely.

2. Cash Handling Practices:

Based on CSD’s review of a sample of the schools’ bank transactions for the months of June 2021 through November 2021, the CSD noted that cash receipt and deposit processes were not properly followed by the school. The deposits in question are summarized below.



Item #	Bank Information	Statement Month	Transaction Date	Transaction Type	Amount per Bank Statement	CSD Comments
1	Hanmi Bank Account Ending in X4749	June 2021	6/29/2021	Deposit	\$18,362.44	Several checks were listed on the deposit recap sheet that totaled \$18,362.44. A single check dated 6/15/2021 in the amount of \$15,202.00 was deposited 10 business days after the date of the check (exceeding the school’s 72-hour deposit timeline per its FPP). The CSD was unable to determine when the check was received by the school.
2	Hanmi Bank Account Ending in X5222	June 2021	6/9/2021	Remote Deposit	\$17,000.00	A single check dated 5/14/2021 in the amount of \$17,000.00 was deposited 17 business days after the date of the check (exceeding the school’s 72-hour deposit timeline per its FPP). The CSD was unable to determine when the check was received by the school.
3	Hanmi Bank Account Ending in X4749	November 2021	11/22/2021	Deposit	\$60,933.00	Several checks were listed on the deposit recap sheet that totaled \$60,933.00. A single check dated 11/15/2021 in the amount of \$52,506.00 was deposited 5 business days after the date of the check (exceeding the school’s 72-hour deposit timeline per its FPP). The CSD was unable to determine when the check was received by the school.

Page 6: Revenue & Accounts Receivable, Deposits, of Ocean Charter School Fiscal Policies and Procedures (FPP) approved by the school’s governing Board on 5/9/2021 states: “Policy: The Business Manager is responsible for making bank deposits. Deposits totaling more than \$15,000 will be deposited within 72 hours.”

In response to the CSD’s observations above, OCS School stated: “Checks [were] sent through the mail and not received until a later date. Ocean will make sure that checks received through mail are deposited within the 72 hours of receipt and acknowledgement.” When asked if the school can provide the specific date when the checks were received in order for the CSD to determine whether the checks



were deposited within the timeframe indicated in the school’s FPP, OCS stated that the envelopes that had the date stamp were not retained due to campus relocation to the new site. Furthermore, school mail was being collected at the previous location.

Although there were three noted instances of infrequent deposits found, according to Ocean Charter, the school's relocation added to the delay in mail collection. Two out of three instances where the checks were not deposited within the 72-hour timeline happened during the school's move to the new location. Based on the CSD’s review, Ocean Charter had no history of delayed bank deposits in the most recent five years. Due to these reasons, this observation is noted under the "Other Observations" section.

Nonetheless, the CSD recommends that the school strictly implement and adhere to the governing board-approved fiscal policies and procedures pertaining to cash handling and controls, including, but not limited to, ensuring that the staff follows established cash management guidelines that clearly define the assignment of responsibilities, documentation and record retention, reviews and reconciliations, deposits, and authorization and approval procedures.

The CSD will continue to monitor the issues referenced above in the “Other Observations” section prior to or 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:

1. Reviewed independent audit report for the Fiscal Year ended June 30, 2021 and noted the following:
 - a. Audit opinion: Unmodified
 - b. Material weaknesses: A material weakness was identified as financial statement finding 2020-001, specifically pertaining to year-end closing procedures. Details regarding this finding were noted under Areas Noted for Further Growth and/or Improvement above.
 - c. Deficiencies/Findings: See “Material weaknesses above.”
 - d. Lack of Going Concern: None Reported
2. Governing board meeting minutes reflecting the presentation of financial reports, such as balance sheets, income statements, and cash flow statements were provided.
3. Governing board meeting minutes reflecting the adoption of the 2021-2022 budget were provided.
4. Evidence of Ocean Charter School offering STRS, PERS, and/or Social Security benefits to its employees and proof of payment was provided.
5. Governing board meeting minutes reflecting the selection of the current independent auditor were provided.
6. Governing board meeting minutes reflecting the discussion of the most current independent audit report were provided.
7. Per the 2020-2021 audit report, the school’s unrestricted ending fund/net asset balance is \$45,994,033 and total expenditures equal \$6,390,573. Therefore, the school’s reserve for economic uncertainty as defined in California Code of Regulations (CCR), Title 5, Section 15450 is 719.72%, which exceeds the minimum 4% based on the school’s Average Daily Attendance (ADA) of 496.11 per the school’s 2021-2022 Second Principal Apportionment data reported.
8. Per the 2020-2021 audit report, the school’s cash and cash equivalents is \$301,701 and total expenditures equal \$6,390,573. Therefore, the school’s cash reserve level is 4.72%, which is below the recommended 5%. The school’s cash reserve level is 10.26% per its 2021-2022 Second Interim Financials. The CSD will continue to monitor the school’s cash reserves through oversight.
9. Governing board meeting minutes reflecting the receipt, review, and approval of interim financial reports submitted to LAUSD were provided.
10. Governing board meeting minutes reflecting the receipt, review, and discussion of the most current Annual Performance-Based Oversight Visit report were provided.
11. Governing board meeting minutes reflecting the approval of the current fiscal policies and procedures were provided.
12. A copy of the charter school’s organizational chart, which depicts the current reporting structure of the charter school, including but not limited to, any board member, or school employee, who handle day-to-day finances and/or have responsibilities outlined within the charter school’s financial policies and procedures, was provided.
13. An itemized accounting regarding total compensation paid in Fiscal Year 2020-2021 to all executives, school leaders, administrators, directors, and non-certificated staff either employed directly by the school or the entity managing the charter school, including the organization’s home office, charter management organization, or related entities which may have decision-making authority over the school was provided.
14. The most current accounts payable aging report was provided.
15. Reviewed the following 28 checks (and 14 electronic credit/debit transactions). The CSD’s observations were noted under the Other Observations section above.
 - a. Check numbers (Hanmi Bank Checking Account Ending in X4749): 2002668, 2002701, 2002706, 2002722, 2002725, 2002758, 2002787, 2002793, 2002800, 500340, 500341, 500343, 500344, 500345, 500365, A001169, A001414, A002532, E000587, P001854, P001877, P003037, P003170, P004580, P005564, P005942, P006182, and P006890.



- b. Reviewed 2 (debit) and credit transactions (California Credit Union Account Ending in X1368, for the months of June 2021 through November 2021 for sample testing. Transaction descriptions are: (1) Date: 7/20/2021, Amount: (\$2,055.52); and (2) Date: 11/24/2021, Amount: \$40,000.00.
 - c. Reviewed 1 (debit) transaction (Capital One Account Ending in X3459, for the months of June 2021 through November 2021 for sample testing. Transaction description is: (1) Date: 6/18/2021, Amount: \$54,295.00.
 - d. Reviewed 7 (debit) and credit transactions (Hanmi Bank Account Ending in X4749, for the months of June 2021 through November 2021 for sample testing. Transaction descriptions are: (1) Date: 6/29/2021, Amount: \$18,362.44; (2) Date: 9/2/2021, Amount: \$6,606.41; (3) Date: 9/9/2021, Amount: \$104,067.00; (4) Date: 10/27/2021, Amount: (\$3,152.96); (5) Date: 11/22/2021, Amount: \$60,933.00; (6) Date: 11/22/2021, Amount: \$615.37; and (7) Date: 11/24/2021, Amount: (\$40,000.00).
 - e. Reviewed 2 (debit) transactions (Hanmi Bank Account Ending in X4838, for the months of June 2021 through November 2021 for sample testing. Transaction descriptions are: (1) Date: 6/30/2021, Amount: (\$125,654.79); and (2) Date: 9/8/2021, Amount: (\$442.64).
 - f. Reviewed 2 credit transactions (Hanmi Bank Account Ending in X5222, for the months of June 2021 through November 2021 for sample testing. Transaction descriptions are: (1) Date: 6/9/2021, Amount: \$17,000.00; and (2) Date: 11/23/2021, Amount: \$750.00.
16. Reviewed credit card statements from June 2021 through November 2021. Selected the months of June 2021, July 2021, August 2021, October 2021, and November 2021 for sample testing. No discrepancies were noted.
- a. California Credit Union Credit Card Ending in X0677 (Director)
 - b. California Credit Union Credit Card Ending in X1650 (Director)
17. Reviewed bank statements and bank reconciliations from June 2021 through November 2021. Selected the months of June 2021, July 2021, September 2021, October 2021, and November 2021 for sample testing. The CSD’s observations were noted under the Other Observations section above.
- a. California Credit Union Checking Account Ending in X1368 (Checking Account)
 - b. ING Direct (Capital One) Account Ending in X3459 (Savings Account)
 - c. Hanmi Bank Account Ending in X4749 (Operating Account)
 - d. Hanmi Bank Account Ending in X4838 (Prop 1D Checking Account)
 - e. Hanmi Bank Account Ending in X5222 (Prop 1D Checking Account)
18. A Segregation of Duties (SOD) review was conducted remotely at Ocean Charter School via videoconference. No discrepancies were noted.
19. Equipment inventory was provided.
20. The Education Protection Account (EPA) allocation and expenditures pertaining to the prior Fiscal Year (i.e., 2020-2021) are posted on the charter school’s website.
21. The most current Audited Financial Statements are posted on the charter school’s website.
22. The 2021-2022 Local Control and Accountability Plan was submitted to LAUSD.
23. The most current Local Control and Accountability Plan is posted on the charter school’s website.
24. According to Ocean Charter’s 2020-2021 independent audit report (Note 6), “[d]uring 2021, the Organization changed the terms of the agreement on the line of credit in the amount of \$1,300,000 from Hanmi Bank with the interest rate of 4.25 percent. The agreement requires the Organization to comply with certain financial and non-financial covenants.” Per Ocean Charter School’s back-office services provider (ExED), this credit line is used for either operating purposes and/or construction project purposes (if needed). The CSD was advised that the school has made no draws from this credit line as of June 30, 2021. The supporting documentation provided to the CSD consists of a copy of the Change in Terms Agreement dated December 21, 2021.



25. Documentation pertaining to the U.S. Small Business Administration’s (SBA) Paycheck Protection Program (PPP) was provided
26. Documentation pertaining to grants that the school received during both Fiscal Years 2020-2021 and 2021-2022 due to the COVID-19 pandemic was provided.
27. Pursuant to AB 1871, a signed and dated written statement that indicates that Ocean Charter School is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each school day was provided.
28. Ocean Charter School did not disclose any legal actions, regulatory proceedings, or investigations that might have a material fiscal impact (including financial viability) to the Charter School, and that is currently pending or was filed within the last year or since the last disclosure period, whichever is later.
29. The 2020-2021 audited and unaudited actuals do not mirror each other. ExED provided the following explanations for the significant variances between Ocean Charter School’s 2020-2021 audited and 2020-2021 unaudited actuals:
 - a. A variance of **(\$1,926,271)** in Cash and Cash Equivalents was primarily due to restricted cash being listed under non-current assets in the audited financials.
 - b. A variance of **(\$1,983,711)** in Current Assets was primarily due to the reclassification in Cash and Cash Equivalents discussed above.
 - c. A variance of **(\$18,861,012)** in Fixed and Other Assets was primarily due to the removal of land from asset listing as discussed under Item 1 (2020-2021 Audited Financial Statement Finding) in the Areas Noted for Further Growth and/or Improvement section above.
 - d. A variance of \$279,328 in Current Liabilities was primarily due to the reclassification of loan balance from long-term to current.
30. Per the LAUSD Charter Schools Accounting Unit’s record, as of April 8, 2022, Ocean Charter owed \$1,195,158 Proposition 39 over-allocated space reimbursement fees to LAUSD (consisting of \$415,134.72, \$354,575.75, and \$485,447.16 for Fiscal Years 2016-2017, 2017-2018, and 2018-2019, respectively, less payments of \$69,999.93). The school’s 2020-2021 audit report disclosed: “On July 16, 2020, the Organization entered into an agreement with the District to fully reimburse the District for Proposition 39 over-allocated space during the 2016-17, 2017-18, and 2018-19 school years.” The school indicated that it has accrued for the amounts owed on its books. The CSD will continue to monitor this matter through oversight.
31. Based on the school’s 2019-2020 and 2020-2021 audit report (and, according to the school), during the fiscal year ended June 30, 2012, the Charter School was awarded \$7,543,549 in Charter School Facilities Program funding established by Proposition 1D. During the fiscal year ended June 30, 2018, the Charter School was awarded an additional \$28,521,085 Facilities Program funding established by Proposition 1D. The balance of \$10,300,000*** in long-term obligations represents one-half of the costs incurred for the Charter School’s approved Proposition 1D project. The site improvements made under the guidelines of the Proposition 1D award are being accounted for as building improvements. Current provisions allow charter schools to be on the title "in trust" through the State of California and the District, "in trust" being in name only with no property rights attached.

*** Per Ocean Charter School’s 2020-2021 independent audit report, the balance of the school’s long-term obligations (as of June 30, 2021) was \$11,188,376 (consisting of \$10,003, 218 in Proposition 1D, less current portion, and \$1,185,158 in Notes payable, less current portion).

The provisions of Proposition 1D allow Ocean Charter School to defer its loan payments until one year after it occupies its new school site. Per Ocean Charter School, on January 9, 2018, the school initiated construction on its new school site, and reached substantial completion on April 1, 2021 with ongoing final inspections and punch list work. Accordingly, Ocean Charter’s repayment of its loan from the California School Finance Authority (CSFA) would commence in August 2022. The school estimated the total construction cost of this project at \$77,422,000.



Per ExED, Ocean Charter received its fourth and final disbursement of augmentation funds in the amount of \$5.2M (in August 2020), which brings the total augmentation funds received to date to \$41,357,427. ExED stated: “Out of the \$56.9M construction contract budget, Ocean has spent/paid for \$56.1M in costs applied to the construction contract through April 2022.”

- 32. The **(\$20,777,337)** adjustment reflected in the school’s 2020-2021 independent audit report is due to the overstatement of property and equipment. A restatement of the financial statements was needed to correct the misstatement. Entries were posted to correct property and costs of issuance as well as the beginning balance. See Areas Noted for Further Growth and/or Improvement above for further details.
- 33. Ocean Charter’s reported Norm Enrollment was 509, 525, 521, 568, and 546 students for Fiscal Years 2017-2018, 2018-2019, 2019-2020, 2020-2021, and 2021-2022, respectively, representing an accumulated growth in enrollment of 37 students since Fiscal Year 2017-2018. The school reported Norm Enrollment of 546 students for Fiscal Year 2021-2022, which exceeds the approved enrollment capacity of 536 students by 10 students. The CSD Team has communicated with Ocean Charter to align its enrollment with the enrollment capacity identified in the approved charter by the following academic school year. The CSD will continue to monitor the school’s student enrollment through oversight.

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 has at least one annual independent audit on file with the Charter Schools Division [Possible Rating of 1-4]

New School – a charter school that does not have an independent audit on file with the Charter Schools Division [Possible Rating of 1-2]

<p><i>An existing school that meets all of the Required Criteria and two of the Supplemental Criteria listed below would be assessed eligible to be considered as Accomplished [Rating of 4].</i></p>	<p><i>An existing school that meets all of the Required Criteria and two of the Supplemental Criteria listed below would be assessed eligible to be considered as Proficient [Rating of 3].</i></p>
<p><u>Existing Schools (based on the most current annual audit):</u> An existing school is one that has at least one annual independent audit on file with the Charter Schools Division</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 audits show no material weaknesses, deficiencies and/or findings; 4. All vendors and staff are paid in a timely manner; 5. Governing board approves Fiscal Policies and Procedures, at a minimum, once prior to each charter renewal term; 6. Charter school consistently adheres to the governing board approved Fiscal Policies and Procedures; 7. Governing board adopts the annual budget; 8. Governing board reviews and approves reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 9. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 10. There is no apparent conflict of interest; 11. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each school day is provided (pursuant to AB 1871 [Ed. Code § 47613.5]); 12. The Education Protection Account allocation and expenditures, the most current 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; 	<p><u>Existing Schools (based on the most current annual audit):</u> An existing school is one that has at least one annual independent audit on file with the Charter Schools Division</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 audit shows no material weaknesses, deficiencies and/or findings; 4. Vendors and staff are paid in a timely manner; 5. Governing board approves Fiscal Policies and Procedures, at a minimum, once prior to each charter renewal term; 6. Charter school generally adheres to the governing board-approved Fiscal Policies and Procedures; 7. Governing board adopts the annual budget; 8. Governing board reviews and approves reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 9. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 10. There is no apparent conflict of interest; 11. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each school day is provided (pursuant to AB 1871 [Ed. Code § 47613.5]); 12. The Education Protection Account allocation and expenditures, the most current 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;



An existing school that meets all of the Required Criteria and two of the Supplemental Criteria listed below would be assessed eligible to be considered as Accomplished [Rating of 4].

- 14. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals;
- 15. Requests for information made by the Charter Schools Division and LAUSD are processed or submitted by the charter school in a timely manner;
- 16. There are no discrepancies cited in the Areas Noted for Further Growth and/or Improvement;
- 17. Audited and unaudited actuals nearly mirror each other;
- 18. Proper segregations of duties are in place;
- 19. There are no outstanding fiscal-related tiered intervention notices issued to the school; and
- 20. If applicable, all LAUSD Board of Education-approved fiscal benchmark(s) are met by the required deadline(s).

Note: Other circumstances and information could influence the rating, which may include the supplemental criteria below, and will be noted in the evaluation.

SUPPLEMENTAL CRITERIA

- 1. The school maintains the minimum reserve for economic uncertainty 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 (e.g., 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 expenses;
- 3. Enrollment is stable or changing at a manageable rate (e.g., the school still maintains a balanced budget, etc.); and
- 4. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting.

An existing school that meets all of the Required Criteria and two of the Supplemental Criteria listed below would be assessed eligible to be considered as Proficient [Rating of 3].

- 14. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals;
- 15. Requests for information made by the Charter Schools Division and LAUSD are processed or submitted by the charter school in a timely manner;
- 16. There are no significant recurring issues;
- 17. Audited and unaudited actuals nearly mirror each other; and
- 18. There are no outstanding fiscal-related tiered intervention notices issued to the school.

Note: Other circumstances and information could influence the rating, which may include the supplemental criteria below, and will be noted in the evaluation.

SUPPLEMENTAL CRITERIA

- 1. The school maintains the minimum reserve for economic uncertainty as defined in CCR, Title 5, Section 15450 (<https://www.law.cornell.edu/regulations/california/5-CCR-Sec-15450>) per the most current audit (e.g., 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 expenses;
- 3. Enrollment is stable or changing at a manageable rate (e.g., the school still maintains a balanced budget, etc.); and
- 4. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting.



*An existing school that meets all of the Required Criteria and two of the supplemental criteria listed below would be assessed eligible to be considered as **Developing** [Rating of 2].*

*An existing school would be assessed as **Unsatisfactory** [Rating of 1] based on the statements below:*

Existing Schools (based on the most current audit):

An existing school is one that has at least one annual independent audit on file with the Charter Schools Division

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An existing school is one that has at least one annual independent audit on file with the Charter Schools Division

REQUIRED CRITERIA

1. Net Assets are positive, or net assets are negative with strong trend toward positive (be positive at the end of the third year, per applicable audit, and beyond);
2. The cash balance at the beginning of the school year is positive;
3. Vendors and staff are paid in a timely manner;
4. Governing board approves Fiscal Policies and Procedures, at a minimum, once prior to each charter renewal term;
5. Governing board adopts the annual budget;
6. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each school day (pursuant to AB 1871 [Ed. Code § 47613.5]);
7. The Education Protection Account allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP are posted on the charter school’s website;
8. The LCAP is submitted to the appropriate agencies;
9. Have an audit conducted annually by an independent auditing firm; and
10. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD.

An Unsatisfactory rating is assessed based on the following conditions, including, but not limited to:

A charter school is assessed as Unsatisfactory if the charter school does not meet the criteria for *Accomplished*, *Proficient*, or *Developing*. 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 *feasible* 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.

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, which may include the supplemental criteria below, and will be noted in the evaluation.

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SUPPLEMENTAL CRITERIA

1. The school maintains the minimum reserve for economic uncertainty as defined in CCR, Title 5, Section 15450



<p><i>An existing school that meets all of the Required Criteria and two of the supplemental criteria listed below would be assessed eligible to be considered as <u>Developing</u> [Rating of 2].</i></p>	<p><i>An existing school would be assessed as <u>Unsatisfactory</u> [Rating of 1] based on the statements below:</i></p>
<p>(https://www.law.cornell.edu/regulations/california/5-CCR-Sec-15450) per the most current audit (e.g., unrestricted fund balance divided by total expenditures);</p> <ol style="list-style-type: none"> 2. The cash balance at the beginning of the school year is at least 5% of the prior year expenses; 3. Enrollment is stable or changing at a manageable rate (e.g., the school still maintains a balanced budget, etc.); and 4. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting. 	

<p><i>A new school that 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><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 style="text-align: center;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. A new school is one that does not have an independent audit on file with the Charter Schools Division; 2. The cash balance at the beginning of the school year is positive; 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 three-year budget and three-year cash flow projections; 4. 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; 5. Interim reports and unaudited actuals project: <ol style="list-style-type: none"> a. Positive net assets b. Expenses less than revenues 	<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>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>



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

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

- 6. As a practice, the governing board reviews and approves the charter school's financial reports as evidenced by the governing board meeting minutes;
- 7. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each school day is provided (pursuant to AB 1871 [Ed. Code § 47613.5]);
- 8. The most current governing board-approved LCAP is posted on the charter school's website; and
- 9. The LCAP is submitted to the appropriate agencies.

Note: A new school is one that does not have an independent audit on file with the Charter Schools Division. New schools are evaluated based on current year information. New schools receive a rating of 1 or 2.

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

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