LOS ANGELES UNIFIED SCHOOL DISTRICT
CHARTER SCHOOLS DIVISION

ANNUAL PERFORMANCE-BASED OVERSIGHT VISIT REPORT*
2024-2025 SCHOOL YEAR
FOR

OCEAN CHARTER (5962)
Name and Location Code of Charter School

* 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.

Revised 12/12/2024

Charter School's Name:	**Ocean Charter**			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 Charter[1]:			**LAUSD Board District:**	**LAUSD Region:**	
July 1, 2018 to June 30, 2026			**4**	**West**	
Number of Students Currently Enrolled:	**Enrollment Capacity Per Charter:**		**Number Above/Below Enrollment Capacity (day of visit):**		**Above by 28**
560	**532**				
Grades Currently Served:	**Grades To Be Served Per Charter:**		**Percent Above/Below Enrollment Capacity (day of visit):**		**Above by 5.3%**
TK-8	**TK-8**				
Norm Enrollment Number:	**559**				
Total Number of Staff Members:	**76**	**Certificated:**	**32**	**Classified:**	**44**
Charter School's Leadership Team Members:		**Kristy Mack-Fett, Executive Director; Megan Helms, Assistant Director**			
Charter School's Contact for Special Education:		**Renee Williams**		**SELPA & Option:**	**LAUSD Option 1**
CSD Assigned Administrator:		**Kristi Maar**		**CSD Fiscal Oversight Manager:**	**Andrea Ines**
Other CSD Team Members:		**Taylor Wichmanowski, Senior Coordinator**			
Oversight Visit Date(s):		**11/15/2024**		**Fiscal Review Date (if different):**	**N/A**
Is school located on a District facility? If so, please indicate the applicable program (e.g., Prop 39, PSC, conversion, etc.):		**Lease**		**LAUSD Co-Location Campus(es) (if applicable):**	**N/A**
Certificate of Occupancy (COO) or Temporary Certificate of Occupancy Type: (if a TCO, please note expiration date)		**N/A**		**COO/TCO Approved Grade Levels and Occupancy Loads:**	**N/A**

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

[1] Education Code section 47607.4 provides that "all charter schools whose term expires on or between January 1, 2022, and June 30, 2025, inclusive, shall have their term extended by two years, and all charter schools whose term expires on or between January 1, 2024, and June 30, 2027, inclusive, shall have their term extended by one additional year."

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 specific renewal criteria prescribed in statute.

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 the California Charter Schools Act, the *LAUSD Policy and Procedures for Charter Schools,* the factors and guidance promulgated by the California State Board of Education in 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.* 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; (2) Areas Noted for Further Growth and/or Improvement; and, if applicable, (3) Corrective Action Required. Under "Corrective Action Required," the CSD reports findings of material noncompliance with applicable law, LAUSD charter policy, or the school's approved charter. **If the report includes any findings under "Corrective Action Required," the charter school must take immediate and appropriate steps to remedy the identified concern.** In accordance with its "tiered intervention" approach to charter school non-compliance and poor performance, the CSD may also send the school appropriate notices, separate and apart from this report, to provide and document time-specific follow-up as necessary. At the other end of the spectrum of performance, any school that earns a rating of *Accomplished* in any category is encouraged to submit to the CSD a summary of those "promising practices" that the school believes have contributed to its success, in order to support the CSD's ongoing efforts to promote and facilitate reciprocal sharing of promising practices among education leaders from across all LAUSD schools.

GOVERNANCE	RATING*
Summary of School Performance	4, Accomplished

Areas of Demonstrated Strength and/or Progress

G1: GOVERNANCE STRUCTURE AND COMPLIANCE MONITORING

The Governing Board has fully implemented the organizational structure set forth in the school's operative charter, including all committees/councils; and has a system in place to ensure it consistently complies with the applicable open meeting requirements for local agencies (e.g., Brown Act, Gov. Code, § 54950 et seq.)Review of documentation provided for oversight (i.e., Folder I: Governance Documentation) included evidence that the current Board of Directors is comprised of eight (8) directors, which is aligned with the organization's most recent Bylaws requiring between seven (7) and fifteen (15) directors.

- Folder I also included a calendar of meetings of the school's governing board for the 2024-2025 school year, showing monthly meetings of the school's governing board scheduled between August 8, 2024 and June 26, 2025.
- Documentation in Binder I included evidence that the school's Finance Committee; Diversity Equity, Inclusion and Belonging Committee; and Governance Committee are scheduled to hold ten (10), nine (9), and seven (7) meetings, respectively, in the 2024-2025 school year.
- Review of the Governance Folder and the school's website included evidence that meetings of the school's governing board are conducted openly and provide opportunity for public participation. Agendas and minutes of meetings of the school's governing board are maintained and posted to the school website and governing board agendas include notice of reasonable accommodations for individuals with disabilities. Agendas for meetings of committees of the board (e.g., Finance, Governance, etc.) are also posted to the school's website.
- The school's website also includes an archive of governing board agendas dating back to the 2013-2014 school year.
- Evidence was also provided that six (6) of the school's eight (8) current directors received Brown Act training on 9/5/2024. School leaders shared at the time of oversight that the school's governing board would also receive Brown Act training at the 12/5/2024 meeting and that any members that could not participate at the governing board meeting would complete a training module online.

G3: RESPONSIVE AND ACCOUNTABLE GOVERNANCE - EDUCATIONAL PROGRAM

The Governing Board regularly considers school performance data, stakeholder input, and other data, and takes appropriate action to achieve positive measurable pupil outcomes (e.g., approving action plans and/or resources, analysis and discussion, etc.)

- Review of governance documentation in Folder I included evidence that meetings of the school's governing board regularly include agenda items for updates/reports regarding student achievement and other key aspects of school performance and operations (e.g., attendance, enrollment, student performance data, etc.) from the organization's Executive Director and committees of the board (e.g., Finance Committee). For example, the Executive Director presented SBAC results from the 2023-2024 school year at the governing board's 9/5/2024 meeting, discussing schoolwide and student group performance and highlighting a need to close performance gaps between select student groups and the school as a whole.
- Board agendas/minutes include evidence that the school's governing board held a public hearing on the 2024-25 LCAP at its meeting 5/2/2024. The 2024-2025 was discussed and approved by the school's governing board at the 6/27/2024 meeting.
- Under the board's governance, the school has achieved positive measurable pupil outcomes, as evidenced by schoolwide ELA and Math performance above state averages, as reported on the 2024 California School Dashboard
- Folder I also included evidence of trainings offered to the school's governing board including, but not limited to, human resources training (covering topics such as "Leaves, Disabilities & Reasonable Accommodation") and conflict of interest training.

Areas Noted for Further Growth and/or Improvement
None noted at this time.

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

Notes:
None.

Progress on LAUSD Board of Education Benchmarks and/or MOU related to GOVERNANCE (if applicable):
☒ Not Applicable

RATING NOTES:
- *A charter school may receive a rating of one (1) in this category for any of the following reasons: 1) Evidence of conflict (s) of interest within the organization (i.e. Governing Board, staff, contracted external parties, etc.), 2) School is in breach of the operative charter, including Federal, State, and District Required Language, 3) School is "Not in Good Standing," 4) Unresolved concern(s) and/or ongoing tiered intervention (i.e., Notice of Concern and/or Notice to Cure), and/or 5) If there are serious concerns related to fiscal matters (e.g., negative financial condition, fiscal mismanagement, repeat material weaknesses, significant deficiencies, and/or significant audit findings disclosed in the charter operator's most recent annual independent audit report, etc.).*
- *A charter school cannot receive a rating greater than three (3) in this category if it receives an overall rating of two (2) or one (1) in any other category (Student Achievement and Educational Performance; Organizational Management, Programs, and Operations; or Fiscal Operations).*

G1: GOVERNANCE STRUCTURE AND COMPLIANCE MONITORING

The Governing Board has implemented the organizational structure, roles, and responsibilities set forth in the approved charter and applicable law, including:
- Governing Board composition, structure, roles, and responsibilities as set forth in the approved charter
- Governing Board committees/councils are implemented as described in the school's charter (e.g., Finance, Human Resources, Academics, etc.)
- The Governing Board has a system in place to ensure compliance with the public-integrity statutes including laws requiring open meetings and laws forbidding financial and other conflicts of interest.
- The Governing Board reviews and certifies the *Compliance Monitoring and Certification of Board Compliance Review* form

Performance Rubric	Sources of Evidence
☒ The Governing Board has fully implemented the organizational structure set forth in the school's operative charter, including all committees/councils; and has a system in place to ensure it consistently complies with the applicable open meeting requirements for local agencies (e.g., Brown Act, Gov. Code, § 54950 et seq.) ☐ The Governing Board has implemented the organizational structure set forth in the school's operative charter, including committees/councils; and has a system in place to ensure it complies with the applicable open meeting requirements for local agencies (e.g., Brown Act, Gov. Code, § 54950 et seq.) ☐ The Governing Board has partially implemented the organizational structure set forth in the school's operative charter; and/or has an ineffective system in place to ensure it is complying with applicable open meeting requirements for local agencies (e.g., Brown Act, Gov. Code, § 54950 et seq.) ☐ The Governing Board has not implemented the organizational structure set forth in the school's operative charter; and has an ineffective or no system in place to ensure it is complying with applicable open meeting requirements for local agencies (e.g., Brown Act, Gov. Code, § 54950 et seq.)	☒ Organizational chart in approved charter ☒ Organizational chart (current) ☒ Board member roster ☒ Bylaws (current) ☒ Board Committee(s) Calendar(s) ☒ California open meeting law training (Brown Act) ☒ Compliance Monitoring and Certification of Board Compliance Review ☒ Board meeting agendas, minutes, and/or documentation ☒ Observation of Governing Board meeting(s) ☒ Discussion with leadership ☐ Stakeholder focus group ☐ Other: (Specify)

G2: DUE PROCESS

The Governing Board has systems in place to ensure that the school provides adequate due process, in accordance with applicable law, the school's charter, and LAUSD charter school policy, to honor and protect the rights of students, employees, parents, and the public in the following areas:
• Student discipline
• Employee grievances and discipline
• Stakeholder complaint resolution pursuant to the Uniform Complaint Procedures (UCP)
• Parent/stakeholder complaint resolution for complaints outside regulatory scope of UCP

Performance Rubric	**Sources of Evidence**
☐ The Governing Board has well-developed systems in place to ensure that the school provides due process, in accordance with applicable law, the charter, and LAUSD charter policy, for students, employees, parents, and the public ☒ The Governing Board has systems in place to ensure that the school provides due process, in accordance with applicable law, the charter, and LAUSD charter policy, for students, employees, parents, and the public ☐ The Governing Board has partially developed systems in place to ensure that the school provides due process, in accordance with applicable law, the charter, and LAUSD charter policy, for students, employees, parents, and the public ☐ The Governing Board has minimal or no systems in place to ensure that the school provides due process, in accordance with applicable law, the charter, and LAUSD charter policy, for students, employees, parents, and the public	☒ Student discipline policy and procedures ☒ Employee grievance and discipline policy and procedure ☒ Uniform Complaint Procedures policy and form(s) ☒ Stakeholder complaint procedures and form(s) ☒ Observation of Governing Board meeting(s) ☒ Discussion with school leadership ☐ Stakeholder focus group ☐ Other: (Specify)

G3: RESPONSIVE AND ACCOUNTABLE GOVERNANCE - EDUCATIONAL PROGRAM

The Governing Board has systems in place to ensure ongoing:
• Review and use of academic performance data (e.g., CA School Dashboard, internal assessments, etc.) and other school data and information to ensure sound Governing Board decision-making in support of continuous improvement of student achievement, fiscal viability, compliance, and overall public school excellence
• Monitoring of the school's implementation of its Local Control and Accountability Plan (LCAP) and additional school plans (e.g., Comprehensive Support and Improvement (CSI), Additional Targeted Support and Improvement (ATSI), School Plan for Student Achievement (SPSA), and action plans for making progress toward LCAP goals)
• Transparent governance and accountability to stakeholders, including compliance with the LAUSD BOE's Charter School Transparency Resolution, as well as consideration of input from the school's committees/councils and stakeholders

Rubric	**Sources of Evidence**
☒ The Governing Board regularly considers school performance data, stakeholder input, and other data, and takes appropriate action to achieve positive measurable pupil outcomes (e.g., approving action plans and/or resources, analysis and discussion, etc.) ☐ The Governing Board considers school performance data, stakeholder input, and other data to inform decision-making (e.g., approving action plans and/or resources, analysis and discussion, etc.) ☐ The Governing Board seldom considers school performance data, stakeholder input, and other data to inform decision-making (e.g., approving action plans and/or resources, analysis and discussion, etc.) ☐ The Governing Board does not consider school performance data, stakeholder input, and other data to inform decision-making (e.g., approving action plans and/or resources, analysis and discussion, etc.)	☒ Board meeting agendas, minutes, and/or documentation ☒ Board member and executive leadership training of Governing Board meeting(s) ☒ Observation of Governing Board meeting(s) ☒ Discussion with school leadership ☐ Stakeholder focus group ☐ Other: (Specify)

G4: RESPONSIVE AND ACCOUNTABLE GOVERNANCE – STAFFING AND EVALUATIONS

The Governing Board has systems in place to ensure ongoing:
• Monitoring of staffing needs and the school's compliance with all applicable credentialing, clearance, and training requirements
• Evaluation procedures with clear performance standards for all school-based staff, including but not limited to administrators, certificated staff, and classified staff
• Evaluation of executive level leadership (including, but not limited to, those positions reporting to the Governing Board, as indicated in Element 4 of the approved charter, such as Executive Director, Area Superintendent, Principal, etc.)

Performance Rubric	**Sources of Evidence**
☐ The Governing Board regularly monitors school staffing to ensure that all students are taught by appropriately credentialed and assigned teachers, and has implemented a well-developed system for the evaluation of all school-based staff and executive level leadership staff ☒ The Governing Board monitors school staffing to ensure that all students are taught by appropriately credentialed and assigned teachers, and has implemented a system for the evaluation of school-based staff and executive level leadership staff ☐ The Governing Board inconsistently monitors school staffing to ensure that all students are taught by appropriately credentialed and assigned teachers, and/or has partially implemented a system for the evaluation of school-based staff and/or executive level leadership staff ☐ The Governing Board seldom monitors school staffing to ensure that all students are taught by appropriately credentialed and assigned teachers, and/or has not implemented a system for the evaluation of school-based staff and/or executive level leadership staff	☒ Human Resources policies and procedures ☒ Board meeting agendas, minutes, and/or documentation ☒ Evaluation of Executive Leadership procedures and tools ☒ Evaluation of school-based staff procedures and tools ☒ Compliance Monitoring and Certification of Board Compliance Review ☒ *Certification of Clearances, Credentialing, and Mandated Reporter Training* form ("ESSA Grid") for current academic year ☒ Observation of Governing Board meeting(s) ☒ Discussion with school leadership ☐ Stakeholder focus group ☐ Other: (Specify)

G5: FISCAL CONDITION

The Governing Board has a system in place to ensure fiscal viability:
• The school is fiscally strong and net assets are positive in the two most current annual independent audit reports.
• If applicable, all LAUSD Board of Education-approved fiscal condition-related benchmark(s) are met by the required deadline(s).

Performance Rubric	Sources of Evidence
Performance ☒ The school is fiscally strong with positive net assets and meets the four (4) recommended financial ratios (identified as part of the Supplemental Criteria within the Fiscal Operations Rubrics section below for the rating of 4, *Accomplished)* in the two most current annual independent audit reports, *__and__*, if applicable, all LAUSD Board of Education-approved fiscal-condition related benchmark(s) are met by the required deadline(s) ☐ The school is fiscally stable, with positive net assets in the most current annual independent audit report ☐ The school is fiscally weak or unstable*, net assets are negative in the most current annual independent audit report, **or** the school does not have an independent audit report or audited financial result for its first operative year on file with LAUSD or prior charter authorizer ☐ The school is consistently fiscally weak, net assets are negative in the two most current annual independent audit reports, **or** the school does not have an independent audit report or audited financial result for its first operative year on file with LAUSD or prior charter authorizer **Notes:** Additional considerations that could influence the rating may include: inadequate cash flow; financial condition and/or enrollment reflecting a downward trend and/or beginning to show signs of deteriorating financial health potentially leading to negative net assets in the current fiscal year and/or the foreseeable future fiscal years; multi-year reliance on financing resources for the school's operations (e.g., factoring of receivables, intraorganizational loans, third party loans, continuing deficit spending, etc.); or that the school may not be able to carry out quality educational programs when the student enrollment drops to a certain level. *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.	☒ Board meeting agendas and minutes ☐ Other evidence of a system for Board review and monitoring of fiscal policies, procedures, budget, and finances ☒ Observation of Governing Board meeting ☒ Discussion with leadership ☒ Independent audit report(s) ☒ Other financial information submitted by the school ☒ Other: (see Fiscal Operations section below)

G6: FISCAL MANAGEMENT AND ACCOUNTABILITY

The Governing Board has a system in place to ensure sound fiscal management and accountability:

- The school adheres to the Governing Board approved fiscal policies and procedures and does not have any areas noted for improvement.
- The two most current annual independent audit reports show no material weaknesses, deficiencies, and/or findings.
- The school is in compliance with Generally Accepted Accounting Principles, applicable law, LAUSD charter policy, and the school's approved charter.
- If applicable, all LAUSD Board of Education-approved fiscal management-related benchmark(s) are met by the required deadline(s).

Performance Rubric	Sources of Evidence
Performance ☒ 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 audit reports show no material weaknesses, deficiencies, and/or findings ☐ 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 report shows no material weaknesses, deficiencies, and/or findings ☐ 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.) ☐ 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, noncompliance with Generally Accepted Accounting Principles (GAAP), applicable law, LAUSD charter policy, and the school's approved charter, conflicts of interest, etc.)	☒ Board meeting agendas and minutes ☐ Other evidence of a system for Board review and monitoring of fiscal policies, procedures, budget, and finances ☒ Observation of Governing Board meeting ☒ Discussion with leadership ☒ Independent audit report(s) ☒ Other: (see Fiscal Operations section below)

STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE	RATING*
Summary of School Performance	3, Proficient
California Department of Education's (CDE) Charter School's Performance Category: Dashboard Year 2024	High Performing-Criterion 2

Areas of Demonstrated Strength and/or Progress

A1: ALL STUDENTS ENGLISH LANGUAGE ARTS (ELA) INDICATOR- (GRADES 3-8 & 11)
- The schoolwide Dashboard ELA Indicator performance color is Green, as compared to the state's color of Orange. The school's 2024 schoolwide ELA DFS (20.7DFS) is higher than the state average (-13.2 DFS).

A2: STUDENT GROUP ENGLISH LANGUAGE ARTS (ELA) INDICATOR- (GRADES 3-8 & 11)
- A majority of the school's numerically significant student groups scored higher than their respective student group statewide average (Status/DFS).
  - The 2024 average DFS in ELA for the school's English Learner student group (-48.6 DFS) is higher than the state average (-67.6 DFS).
  - The 2024 average DFS in ELA for the school's Latino student group (-7.0 DFS) is higher than the state average (-39.3 DFS).
  - The 2024 average DFS in ELA for the school's Socioeconomically Disadvantaged student group (4.0 DFS) is higher than the state average (-40.9 DFS)
  - The 2024 average DFS in ELA for the school's Students with Disabilities student group (-50.1 DFS) is higher than the state average (-95.6 DFS)
  - The 2024 average DFS in ELA for the school's Two or More Races student group (20.6 DFS) is lower than the state average (24.3 DFS)
  - The 2024 average DFS in ELA for the school's White student group (37.3 DFS) is higher than the state average (19.2 DFS)

A3: ALL STUDENTS MATH INDICATOR- (GRADES 3-8 & 11)
- The schoolwide Dashboard Math Indicator performance color is Green, as compared to the state's color of Orange. The school's 2024 schoolwide Math DFS (-0.8 DFS) is higher than the state average (-47.6 DFS).

A4: STUDENT GROUP MATH INDICATOR- (GRADES 3-8 & 11)
- A majority of the school's numerically significant student groups scored higher than their respective student group statewide average (Status/DFS).
  - The 2024 average DFS in Math for the school's English Learner student group (-42.1 DFS) is higher than the state average (-93.4 DFS).
  - The 2024 average DFS in Math for the school's Latino student group (-24.2 DFS) is higher than the state average (-79.2 DFS).
  - The 2024 average DFS in Math for the school's Socioeconomically Disadvantaged students (-14.6 DFS) is higher than the state average (-78.2 DFS)
  - The 2024 average DFS in Math for the school's Students with Disabilities student group (-84.2 DFS) is higher than the state average (-124.3 DFS)
  - The 2024 average DFS in Math for the school's Two or More Races student group (-25.2 DFS) is lower than the state average (-5.3 DFS)
  - The 2024 average DFS in Math for the school's White student group (20.2 DFS) is higher than the state average (-10.3 DFS)

A8: ALL STUDENTS CHRONIC ABSENTEEISM INDICATOR- (GRADES K-8)

- The schoolwide Dashboard Chronic Absenteeism Indicator performance color is Yellow, which is the same as the state's color of Yellow. However, the school's 2024 percentage of chronically absent students (12.5%) is lower than the state average (18.6%).

A10: ALL STUDENTS SUSPENSION RATE INDICATOR- (GRADES K-12)
- The schoolwide Dashboard Suspension Rate Indicator performance color is Yellow, as compared to the state's color of Green. The school's 2024 percentage of students suspended at least one day (0.7%) is lower than the state average (3.2%).

Areas Noted for Further Growth and/or Improvement
None noted at this time.

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

Local Indicators: Dashboard Year 2024
Basic Services and Conditions: Met
Implementation of State Academic Standards: Met
Parent and Family Engagement: Met
School Climate: Met
Access to a Broad Course of Study: Met

Notes:
Charter School's 2024-2025 Every Student Succeeds Act (ESSA) Assistance Status:
☐ Comprehensive Support and Improvement – Low Graduation Rate (CSI- Low Grad)
☐ Comprehensive Support and Improvement – Low Performance (CSI- Low Perform)
☐ Additional Targeted Support and Improvement (ATSI)
☐ Targeted Support and Improvement (TSI)
☒ No Status

2024 LCFF Charter School Assistance Eligibility:
☒ General Assistance (Level 1) - resources and assistance that is made available to all local educational agencies
☐ Differentiated Assistance (Level 2) - local educational agencies that meet certain eligibility criteria for additional support

For 2023-2024:

The school's percent of "At Risk" ELs is 6.3% as compared to the state's percent of 6.8%
The school's percent of "LTELs" is 3.1% as compared to the state percent of 10.6%

English Learner (EL) Reclassification:
As of the time of the issuance of this Annual Performance–Based Oversight Report, the state has not published the "Annual Reclassification (RFEP) Counts and Rates" for the 2021-2022, 2022-2023, and 2023-2024 academic years. Please note that, depending on the release date of the 2021-2022, 2022-2023, and the 2023-2024 RFEP counts and rates, the District may elect to update and reissue a revised 2024-2025 Annual Performance Based Visit Report.

The Indicator information below is provided for informational purposes only and will not be scored.

A12: ALL STUDENTS SCIENCE INDICATOR
The school's schoolwide Dashboard Science Indicator Status (-4.1 DFS) is higher than the state (-13.5 DFS).

Progress on LAUSD Board of Education Benchmarks and/or MOU related to STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE (if applicable):
☒ Not Applicable

RATING NOTE: A charter school cannot receive a rating in this category greater than a one (1) if the school has been identified as a Low Performing charter school based on the state's published list.

A1: ALL STUDENTS ENGLISH LANGUAGE ARTS (ELA) INDICATOR- (GRADES 3-8 & 11)

The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:
- California School Dashboard All Students ELA Indicator (CDE)

Performance Rubric	Sources of Evidence
☐ The California School Dashboard All Students ELA Indicator color is Blue ☒ The California School Dashboard All Students ELA Indicator color is Green; or a Status (DFS) that is the same or higher than the state average ☐ The California School Dashboard All Students ELA Indicator color is Yellow or Orange; and a Status (DFS) that is lower than the state average ☐ The California School Dashboard All Students ELA Indicator color is Red ☐ Not Available - No color assigned on the California School Dashboard for the ELA Indicator	☒ California School Dashboard (CDE) ☐ Office of Data & Accountability's Data Set (LAUSD) ☐ Other: (Specify)

A2: STUDENT GROUP ENGLISH LANGUAGE ARTS (ELA) INDICATOR- (GRADES 3-8 & 11)

The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:
- California School Dashboard ELA Indicator for Numerically Significant Student Groups (30 or more students) (CDE)

Performance Rubric	Sources of Evidence
☐ All numerically significant student groups scored higher than their respective student group statewide average (Status/DFS) ☒ The majority of the numerically significant student groups scored higher than their respective student group statewide average (Status/DFS) ☐ Less than a majority of the numerically significant student groups scored higher than their respective student group statewide average (Status/DFS) ☐ None of the school's numerically significant student groups scored higher than their respective student group statewide average (Status/DFS) ☐ Not Available - No assessment of performance on the California School Dashboard for this indicator	☒ California School Dashboard (CDE) ☐ Office of Data & Accountability's Data Set (LAUSD) ☐ Other: (Specify)

A3: ALL STUDENTS MATH INDICATOR- (GRADES 3-8 & 11)

The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:
- California School Dashboard All Students Math Indicator (CDE)

Performance Rubric	Sources of Evidence

☐ The California School Dashboard All Students Math Indicator color is Blue ☒ The California School Dashboard All Students Math Indicator color is Green; or a Status (DFS) that is the same or higher than the state average ☐ The California School Dashboard All Students Math Indicator color is Yellow or Orange; and a Status (DFS) that is lower than the state average ☐ The California School Dashboard All Students Math Indicator color is Red ☐ Not Available - No color assigned on the California School Dashboard for the Math Indicator	☒ California School Dashboard (CDE) ☐ Office of Data & Accountability's Data Set (LAUSD) ☐ Other: (Specify)

A4: STUDENT GROUP MATH INDICATOR- (GRADES 3-8 & 11)

The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:
- California School Dashboard Math Indicator for Numerically Significant Student Groups (30 or more students) (CDE)

Performance Rubric	Sources of Evidence
☐ All numerically significant student groups scored higher than their respective student group statewide average (Status/DFS) ☒ The majority of the numerically significant student groups scored higher than their respective student group statewide average (Status/DFS) ☐ Less than a majority of the numerically significant student groups scored higher than their respective student group statewide average (Status/DFS) ☐ None of the school's numerically significant student groups scored higher than their respective student group statewide average (Status/DFS) ☐ Not Available - No assessment of performance on the California School Dashboard for this indicator	☒ California School Dashboard (CDE) ☐ Office of Data & Accountability's Data Set (LAUSD) ☐ Other: (Specify)

A5: ALL STUDENTS ENGLISH LEARNER PROGRESS INDICATOR (ELPI)

The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:
- California School Dashboard All Students ELPI (CDE)

Performance Rubric	Sources of Evidence

☐ The California School Dashboard All Students ELPI color is Blue ☐ The California School Dashboard All Students ELPI color is Green; or a Status (Percent) that is the same or higher than the state average ☐ The California School Dashboard All Students ELPI color is Yellow or Orange; and a Status (Percent) that is lower than the state average ☐ The California School Dashboard All Students ELPI color is Red ☒ Not Available - No color assigned on the California School Dashboard for the ELPI	☒ California School Dashboard (CDE) ☐ Office of Data & Accountability's Data Set (LAUSD) ☐ Other: (Specify)

A6: ALL STUDENTS COLLEGE/CAREER (CCI) INDICATOR- (GRADES 9-12)

The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:
- California School Dashboard All Students CCI (CDE)

Performance Rubric	Sources of Evidence
☐ The California School Dashboard All Students CCI color is Blue ☐ The California School Dashboard All Students CCI color is Green; or a Status (Percent) that is the same or higher than the state average ☐ The California School Dashboard All Students CCI color is Yellow or Orange; and a Status (Percent) that is lower than the state average ☐ The California School Dashboard All Students CCI color is Red ☐ Not Available – No color assigned on the California School Dashboard for the CCI ☒ Not Applicable - CCI is not applicable for the grade levels assigned at the charter school	☒ California School Dashboard (CDE) ☐ Office of Data & Accountability's Data Set (LAUSD) ☐ Other: (Specify)

A7: STUDENT GROUP COLLEGE/CAREER INDICATOR (CCI) - (GRADES 9-12)

The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:
- California School Dashboard CCI for Numerically Significant Student Groups (30 or more students) (CDE)

Performance Rubric	Sources of Evidence

☐ All numerically significant student groups scored higher than their respective student group statewide average (Status/Percent) ☐ The majority of the numerically significant student groups scored higher than their respective student group statewide average (Status/Percent) ☐ Less than a majority of the numerically significant student groups scored higher than their respective student group statewide average (Status/Percent) ☐ None of the school's numerically significant student groups scored higher than their respective student group statewide average (Status/Percent) ☐ Not Available – No assessment of performance on the California School Dashboard for this indicator ☒ Not Applicable - CCI is not applicable for the grade levels assigned at the charter school	☒ California School Dashboard (CDE) ☐ Office of Data & Accountability's Data Set (LAUSD) ☐ Other: (Specify)

A8: ALL STUDENTS CHRONIC ABSENTEEISM INDICATOR- (GRADES K-8)

The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:
  - California School Dashboard All Students Chronic Absenteeism Indicator (CDE)

Performance Rubric	Sources of Evidence
☐ The California School Dashboard All Students Chronic Absenteeism Indicator color is Blue ☒ The California School Dashboard All Students Chronic Absenteeism Indicator color is Green; or a Status (Percent) that is the same or lower than the state average ☐ The California School Dashboard All Students Chronic Absenteeism Indicator color is Yellow or Orange; and a Status (Percent) that is higher than the state average ☐ The California School Dashboard All Students Chronic Absenteeism Indicator color is Red notwithstanding the Status (Percent) ☐ Not Available - No color assigned on the California School Dashboard for the Chronic Absenteeism Indicator ☐ Not Applicable - The Chronic Absenteeism Indicator is not applicable for the grade levels assigned at the charter school	☒ California School Dashboard (CDE) ☐ Office of Data & Accountability's Data Set (LAUSD) ☐ Other: (Specify)

A9: ALL STUDENTS GRADUATION RATE INDICATOR- (GRADES 9-12)

The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:
  - California School Dashboard All Students Graduation Rate Indicator (CDE)

Performance Rubric	Sources of Evidence
☐ The California School Dashboard All Students Graduation Rate Indicator color is Blue ☐ The California School Dashboard All Students Graduation Rate Indicator color is Green; or a Status (Percent) that is the same or higher than the state average ☐ The California School Dashboard All Students Graduation Rate Indicator color is Yellow or Orange; and a Status (Percent) that is lower than the state average ☐ The California School Dashboard All Students Graduation Rate Indicator color is Red ☐ Not Available - No color assigned on the California School Dashboard for the Graduation Rate Indicator ☒ Not Applicable - The Graduation Rate Indicator is not applicable for the grade levels assigned at the charter school	☒ California School Dashboard (CDE) ☐ Office of Data & Accountability's Data Set (LAUSD) ☐ Other: (Specify)

A10: ALL STUDENTS SUSPENSION RATE INDICATOR- (GRADES K-12)

The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:
- California School Dashboard All Students Suspension Rate Indicator (CDE)

Performance Rubric	Sources of Evidence
☐ The California School Dashboard All Students Suspension Rate Indicator color is Blue ☒ The California School Dashboard All Students Suspension Rate Indicator color is Green; or a Status (Percent) that is the same or lower than the state average ☐ The California School Dashboard All Students Suspension Rate Indicator color is Yellow or Orange; and a Status (Percent) that is higher than the state average ☐ The California School Dashboard All Students Suspension Rate Indicator color is Red ☐ Not Available - No color assigned on the California School Dashboard for the Suspension Rate Indicator	☒ California School Dashboard (CDE) ☐ Office of Data & Accountability's Data Set (LAUSD) ☐ Other: (Specify)

A11: INTERNAL ASSESSMENT – VERIFIED DATA IMPLEMENTATION

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

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

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

The charter school provided the following Verified Data for consideration: ☒ Academic Progress Indicator(s) and/or ☐ Postsecondary Indicator(s)

Academic Progress Indicator(s) for the 2023-2024 School Year:

Academic Progress Indicator (ELA): MAP Growth by NWEA, Grades K–12	Grade Levels: 1-8	Assessment Administration: Fall/Winter/Spring	95% Participation Met*: Met
Academic Progress Indicator (Math): MAP Growth by NWEA, Grades K–12	Grade Levels: 1-8	Assessment Administration: Fall/Winter/Spring	95% Participation Met*: Met

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

1. The charter school did disaggregate student performance data by student groups. English Learner, Socioeconomically Disadvantaged, and Students with Disabilities
2. The charter school affirmed that the assessments were administrated as intended, consistent with the test publishers' administration and test security procedures.
3. The charter school provided the following publisher's verified data report(s):
   ☐ i-Ready K-8 by Curriculum Associates: *Diagnostic Growth*
   ☐ i-Ready 9-12 by Curriculum Associates: *Academic Progress Report*
   ☒ MAP Growth by NWEA: *Student Growth Summary Report*
   ☐ Star Assessment by Renaissance: *Star Growth Report*
   ☐ Other:
   ☐ The charter school provided sections of the publisher's report, however it could not be used as verified data because it was not the complete report.
   ☐ The charter school provided school created reports that are not considered verified data.
   ☐ The charter school did not provide the publisher's designated report to demonstrate one year's growth.

As the date of this published report, the names of the above-mentioned reports are the District's current understanding from the publisher.

Postsecondary Indicators (high school only): N/A

Postsecondary Indictor: Choose an item.

1. The report provided by the charter school Choose an item. the results of at least 95% of eligible students. If the charter school did not meet the 95% participation rate, the charter school's plan to address the participation is included in the Notes below.
2. The report provided by the charter school Choose an item. the number of eligible students and missing or non-participating students.

3. The report provided by the charter school Choose an item. evidence of comparing the data to similar peers (which may include, but not limited to, similar demographics, pupil student groups, first-time college attendance, or other similar circumstances and if not available, comparison to statewide data).

Notes:
None

A12: ALL STUDENTS SCIENCE INDICATOR- (GRADES 5, 8, 10-12)

The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:
- California School Dashboard All Students Science Indicator (CDE)

Performance Rubric	Sources of Evidence
The Science Indicator information is for informational purposes only and will not be scored. ☒ The California School Dashboard All Students Science Indicator is higher than the state ☐ The California School Dashboard All Students Science Indicator is lower than the state ☐ Not Applicable - The Science Indicator is not applicable for the grade levels assigned at the charter school	☒ California School Dashboard (CDE) ☐ Office of Data & Accountability's Data Set (LAUSD) ☐ Other: (Specify)

LOCAL CONTROL AND ACCOUNTABILITY PLAN 2024-2025 (For Informational Purposes Only)

The CSD reviewed the Local Control and Accountability Plan.	
All requested template information and descriptions were provided:	**Sources of Evidence**
☒ LCFF Budget Overview for Parents ☒ 2023-2024 LCAP Annual Update ☒ Plan Summary ☒ Engaging Educational Partners ☒ Goals and Actions ☒ Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students ☒ Action Tables ☒ Instructions	☒ Local Control and Accountability Plan ☒ Board Agenda and Minutes
Notes: None	

ORGANIZATIONAL MANAGEMENT, PROGRAMS, AND OPERATIONS	RATING*
Summary of School Performance	3, Proficient

Areas of Demonstrated Strength and/or Progress

O1: 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; and has achieved an overall rating of "3" or "4" in the Student Achievement and Educational Performance category of this year's oversight report

- School leaders highlighted key features of the school including relationship-based education (e.g., teachers loop with the same cohort of students for multiple years) and arts-integration (e.g., Main Lesson Books integrate fine arts, classes produce/perform plays, and specialty classes such as handwork and percussion provide additional arts education/enrichment)
  - The school also provided an "OCS Professional Development Calendar/Plan, 2024-2025" (which lists topics aligned to the school's key features including, but not limited to, "Art of Teaching" and "Positive Discipline for the Classroom") in addition to a description of the school's process for determining professional development needs, which includes review of disaggregated CAASPP assessment data.
- Documentation in Folder III (e.g., lesson plans) and classroom observations included evidence that the school's courses are aligned to the California Content Standards.
- Prior to classroom observations, school leaders identified relationship-based education and arts-integration as focus areas aligned to the school's key features and professional development program. During class walkthroughs, CSD staff observed evidence of implementation of focus areas including, but not limited to, student paintings aligned to history/social science content, students engaged in cooperative project-based learning aligned to math content, and singing integrated into a first grade lesson on months of the year. School leaders and CSD staff debriefed these walkthroughs with discussion of observations that aligned to the focus areas and potential growth areas/opportunities for improvement.
- Documentation in Folder III included evidence of a system to analyze and respond to student achievement data based on internal assessments administered to students at three points in the academic year.

O2: MEETING THE NEEDS OF ALL STUDENTS; STUDENT GROUP DATA ANALYSIS

The school has a well-developed system to implement and monitor the components of the charter's instructional program designed to meet the learning needs of all students, including its student groups; provides standards-aligned designated and integrated ELD for English Learners; evidence of systems to modify instruction based on data analysis; and has achieved an overall rating of "3" or "4" in the Student Achievement and Educational Performance category of this year's oversight report

- Review of documentation in Folder III and discussions with school leaders included evidence of implementation of differentiated instructional strategies designed to meet the needs of all students (e.g., small group instruction) and intervention/enrichment programs designed to meet the needs of the school's student groups that include regular data analysis and progress monitoring. For example, evidence included a document showing a plan for math interventions in grades 1-5 based on the following: NWEA benchmark data, informal intervention assessment scores, and teacher observations.
- Review of documentation in Folder III, classroom observations, and discussion with school leaders included evidence of implementation of integrated and designated ELD, including but not limited to, "Integrating English Language Development" professional development materials.

- As noted above in the Student Achievement and Educational Performance category, the school achieved positive results on the 2024 California School Dashboard for its student groups as evidenced by a majority of the school's numerically significant student groups outperforming their respective student group state averages in ELA and Math.

Areas Noted for Further Growth and/or Improvement

O4: SCHOOL CLIMATE AND STUDENT DISCIPLINE

- Per the *LAUSD Office of Data & Accountability's Data Sets for suspension, expulsion, and disproportionality*, Charter School had a 28.93 percentage point suspension rate disproportionality for its African American student group for the 2023-2024 school year (i.e., the African American suspension rate of 30.00% exceeded the schoolwide rate of 1.07% by 28.93 percentage points). In light of this data, Charter School was issued a Notice to Cure concurrently with this report seeking the school's account of these data outcomes and its procedures to monitor student behavior data to ensure equitable implementation of student discipline and behavioral supports.

Corrective Action Required

Per the 6/9/2025 Notice to Cure referenced above, Charter School must provide a response to the Charter Schools Division (CSD) by June 30, 2025.

Notes:

- Ocean Charter's 2024-2025 Norm Enrollment of 559 students exceeds the enrollment capacity of 532 students, per the school's operative charter. On March 7, 2025, the CSD sent an email to Ocean Charter requesting a plan to align the school's enrollment with the enrollment capacity identified in its approved charter for the 2025-2026 academic year. On March 28, 2025, Ocean Charter provided a response stating, "We plan to work collaboratively with the district to update our enrollment number to reflect actual enrollment… We understand that this process can be part of our overall charter renewal process as a high performing school."

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

☐ Not Applicable

- Ocean Charter provided its annual benchmark update on November 23, 2024, noting outreach events including, but not limited to, hosting school tours, distributing fliers in community spaces (parks, libraries, schools, local businesses, etc.), online marketing, and presentations of school info and student work at school fairs. Ocean Charter's update included enrollment data trends across multiple racial/ethnic trends, noting a slight increase in PHBAO students between 2023-2024 and 2024-2025.

RATING NOTES:
- *A charter school cannot receive a rating in this category greater than one (1) for any of the following reasons: 1) Failed to complete criminal background clearances for <u>any new staff and/or sole proprietor</u> (as defined on the Certification of Clearances, Credentialing, and Mandated Training) prior to employment; and/or failed to obtain DOJ clearance certification, as appropriate, from a vendor; 2) Failed to have Health, Safety, and Emergency Plan; 3) Failed to have an appropriate Certificate of Occupancy, or equivalent; and/or 4) The school is in breach of the operative charter, including Federal, State, and District Required Language related to this section.*
- *A charter school cannot receive a rating in this category greater than two (2) for any of the following reasons: 1) Failed to conduct child abuse mandated reporter training in accordance with Education Code 44691; 2) Any teacher of the instructional program is not appropriately credentialed (including required authorization(s) e.g., English Learner authorization) and assigned per legal requirements and the school's operative charter at any time during the academic year.*
- *A charter school may receive an overall rating of two (2) for the following reason: Failed to provide evidence of any item on the "Review of Health and Safety Compliance Items" checklist below.*
- *A charter school cannot receive a rating in this category greater than three (3) for the following reason: Failed to provide evidence of any item on the "Review of Transparency and Stakeholder Information Compliance Items" checklist below.*

O1: IMPLEMENTATION OF THE EDUCATIONAL PROGRAM

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

Performance Rubric	Sources of Evidence

☒ 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; and has achieved an overall rating of "3" or "4" in the Student Achievement and Educational Performance category of this year's oversight report ☐ The school has implemented the educational program, including key features, outlined in the school's charter and aligned to California State Content Standards specific to the grade levels served ☐ 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 ☐ 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	☒ Key Features of the Educational Program ☒ Standards-Based Instructional Program ☐ Master Schedule/Course Schedule ☒ Student Achievement Data Analysis ☒ Professional Development documentation ☒ Classroom/site Observation ☒ Discussion with school leadership ☐ Other: (Specify) High School: N/A ☐ System for monitoring student progress toward and completion of graduation and A-G Requirements ☐ WASC Accreditation Notification Letter ☐ UC Doorways course approval ☐ Graduation Requirement/Policy ☐ Math Placement Assessment Policy (9th grade only) ☐ Advanced Placement Exam: Participation Rate and Passage Rate ☐ College acceptance and enrollment rates

O2: MEETING THE NEEDS OF ALL STUDENTS; STUDENT GROUP DATA ANALYSIS

The school has a system in place to ensure:

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

Performance Rubric	Sources of Evidence

☒ The school has a well-developed system to implement and monitor the components of the charter's instructional program designed to meet the learning needs of all students, including its student groups; provides standards-aligned designated and integrated ELD for English Learners; evidence of systems to modify instruction based on data analysis; and has achieved an overall rating of "3" or "4" in the Student Achievement and Educational Performance category of this year's oversight report ☐ The school has a system to implement and monitor the components of the charter's instructional program designed to meet the learning needs of all students, including its student groups; provides standards-aligned designated and integrated ELD for English Learners; and evidence of systems to modify instruction based on data analysis ☐ The school has partially implemented the components of the charter's instructional program designed to meet the learning needs of all students, including its student groups, and/or limited evidence of systems to modify instruction based on data analysis ☐ The school has minimally implemented, or not at all, the components of the charter's instructional program designed to meet the learning needs of all students, including its student groups, and/or no evidence of systems to modify instruction based on data analysis	☒ Implementation of differentiated instructional strategies ☒ Intervention/Enrichment Program during the instructional day ☒ Student Group data analysis ☒ Professional Development documentation ☒ Classroom/site Observation ☒ Discussion with school leadership ☐ Other: (Specify) English Learners ☒ Master Plan for English Learners ☒ Designated English Language Development (ELD) schedule ☒ Documentation of implementation of the school's Master Plan for English Learners ☐ Implementation of a data analysis system

O3: SPECIAL EDUCATION

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 mandated IEP timeline records and accurate service provision records in Welligent

Performance Rubric	Sources of Evidence
☐ 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; provides staff with regular and ongoing professional development/training to support implementation of its special education program; and as documented in Welligent, adheres to mandated IEP timelines and maintains accurate service provision records ☐ The school has a system in place for implementation and monitoring of its special education processes and program in compliance with all requirements; provides staff with professional development/training to support implementation of its special education program; and as documented in Welligent, adheres to mandated IEP timelines and maintains accurate service provision records ☐ The school has a partially developed system in place for implementation and monitoring of its special education processes and program in compliance with all requirements ☐ The school has a minimal or no system in place for implementation and monitoring of its special education processes and program in compliance with all requirements ☒ Not Applicable - Charter school participates in LAUSD's Option 1 SELPA ☐ Charter school does not participate in LAUSD's SELPA	☐ Welligent IEP Timeline and Service Tracking Reports ☐ District Validation Review (DVR) ☐ Annual Self-Review Checklist ☐ Professional Development documentation ☐ Discussion with school leadership

O4: SCHOOL CLIMATE AND STUDENT DISCIPLINE

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

Performance Rubric	Sources of Evidence
☐ The school has a well-developed and effective school climate and student discipline system that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights, as demonstrated by schoolwide suspension event rate data less than 3%, and suspension disproportionality rates that do not reach or exceed 4.5% for the Students with Disabilities or African American student groups ☐ The school has a school climate and student discipline system that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights, as demonstrated by schoolwide suspension event rate data less than 4.5%, and suspension disproportionality rates that do not reach or exceed 14.5% for the Students with Disabilities or African American student groups ☒ The school has a partially developed and/or minimally effective school climate and student discipline system that is only partially aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights ☐ The school has a minimally developed school climate and student discipline system as demonstrated by one or more of the following: the issuance of repeated CSD Notices to Cure (tiered intervention) related to suspension/expulsion; noted concerns related to ensuring due process rights when implementing suspension/expulsion practices; violation of law or policy.	☒ Positive school climate system and Restorative Justice documentation ☒ Documentation of systems to prevent acts of bullying ☒ Documentation of systems to promote regular attendance ☒ Professional Development documentation ☒ LAUSD Office of Data & Accountability's Data Sets for suspension, expulsion, and disproportionality ☒ Classroom/site Observation ☒ Discussion with school leadership ☐ Stakeholder focus group ☐ Other: (Specify)

O5: STAKEHOLDER ENGAGEMENT AND INVOLVEMENT - QUALITY INDICATOR

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), English Learner Advisory Committee (ELAC), and/or Parent Advisory Committee (PAC) in accordance with applicable legal requirements (e.g., member composition of committee/council, legally required topics, etc.), if applicable
- The liaison for students experiencing homelessness has identified this population through outreach and coordination activities with other organizations, and provided related referral of services to families, children, and youth experiencing homelessness

Performance Rubric	Sources of Evidence
☐ The school provided evidence of a well-developed and effective system for stakeholder engagement, including gathering input, encouraging involvement, sharing information, and resolving concerns; and, as applicable, implements an SSC, ELAC, and/or PAC in accordance with all legal requirements ☒ The school provided evidence of a system for stakeholder engagement, including gathering input, encouraging involvement, sharing information, and resolving concerns; and, as applicable, implements an SSC, ELAC, and/or PAC in accordance with all legal requirements ☐ The school provided limited evidence of a system for stakeholder engagement, sharing information, and resolving concerns ☐ The school provided little to no evidence of a system for stakeholder engagement, sharing information, and resolving concerns	☒ Yearlong Calendar of stakeholder engagement events/meetings. ☒ Stakeholder Engagement ☒ Stakeholder Consultation ☐ School Site Council (SSC) documentation ☐ Parent Advisory Committee (PAC) documentation ☐ English Learners Advisory Committee (ELAC) documentation ☒ Foster Youth/Students Experiencing Homelessness Designee ☒ School website ☒ Discussion with school leadership ☐ Stakeholder focus group ☐ Other: (Specify)

O6: CLEARANCES AND CREDENTIALING COMPLIANCE

The school is in compliance with applicable law and the terms of its approved charter regarding clearances and credentialing:
- All certificated staff are fully credentialed, including EL authorizations, and appropriately assigned as authorized by their credentials at all times
- Individuals who have been continuously employed in a teaching position since the 2019–20 school year obtain the appropriate certificate, permit, or other document for their certificated assignment no later than July 1, 2025 (Ed. Code § 47605.4(a))
- The school has obtained all necessary employee clearances, including criminal background and tuberculosis (TB) risk assessments/clearances, prior to employment, and keeps all clearances current
- The school has obtained all necessary vendor clearances, including criminal background and tuberculosis (TB) risk assessments/clearances as applicable, prior to the provision of service, and keeps all clearances current

- School employees and other mandated reporters working on behalf of the school receive annual training on child abuse awareness and reporting, in accordance with the requirements of Ed. Code, § 44691
- Staff receive annual training in Pupil Suicide Prevention and Awareness (as applicable) pursuant to Ed. Code §215
- Staff receive annual training in bloodborne pathogens, per 8 California Code of Regulations ("CCR"), § 5193
- 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

Performance Rubric	Sources of Evidence
☐ The school has implemented an effective system which includes procedures to continually monitor and maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements at all times, which has led to clear and accurate record keeping/documentation of its compliance ☒ The school has implemented and monitors systems and procedures that maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements ☐ The school has partially implemented and/or intermittently monitors systems and procedures leading to inconsistent compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements ☐ 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 Note: The rating of this indicator incorporates the ESSA Grid and evidence provided by the charter school in its Triannual submission and at the time of the oversight visit for those staff and/or vendors not included in the Triannual submission.	☒ *Certification of Clearances, Credentialing, and Mandated Reporter Training 2023-2024* form ("ESSA Grid") ☒ Staff roster ☒ School master schedule ☒ Custodian(s) of Records documentation ☒ Criminal Background Clearance Certifications ☒ Teaching credential/authorization documentation ☒ Vendor clearances and credentialing certifications ☒ Volunteer (TB) risk assessment/clearance certification ☒ Discussion with school leadership ☐ Other: (Specify)

Review of Health and Safety Compliance Items		
The items below are expected to be evident at the charter school to ensure the protection of student and staff health and safety. Failure to provide evidence of any of the applicable items below may lead to tiered intervention, as appropriate, and restrict the overall rating in the Organizational Management, Programs, and Operations category as indicated below.		
A charter school cannot receive an overall rating in this category greater than one (1) if the items below are not evident.		
Item	**Evident**	**Not Evident**
A current, comprehensive, site-specific comprehensive Health, Safety, and Emergency School Safety Plan per requirements of Ed. Code, §§ 47605(c)(5)(F), 32282,and 35179.4, as applicable. (Note: For schools co-located with a District school, the charter school participates in and complies with the District school's Integrated Safe School Plan)	☒	☐
A current site-specific Certificate(s) of Occupancy or equivalent that authorizes the current use of the site	☒	☐
A charter school may receive an overall rating in this category of two (2) if any of the items below are not evident. If several (i.e., two or more) items below are not evident, charter school may receive an overall rating of one (1) in this category.		
Item	**Evident**	**Not Evident**
School has sufficient emergency supplies in the event of a natural disaster or other emergency (Ed. Code § 32282)	☒	☐
School conducts annual emergency drills and trainings as legally required to prepare for a natural disaster or other emergency, per Ed. Code §§ 32001 and 32282	☒	☐
Provision and documentation of health screenings (e.g., vision, hearing, and scoliosis) per current applicable law and terms of the charter (Ed. Code § 49450 et seq, as referenced in FSDRL)	☒	☐
Stock and maintenance of the required number and type of emergency epinephrine auto-injectors ("epi-pen") onsite and training has been provided to volunteer staff member(s) in the storage and emergency use, per Ed. Code § 49414 and § 4119.2 of the Business and Professions Code	☒	☐
Provision of at least two meals free of charge (breakfast and lunch) during each school day to students requesting a meal, regardless of their free or reduced-price meal eligibility, per Ed. Code § 49501.5	☒	☐
A Board adopted Pupil Suicide Prevention Policy (grades 1-6 and/or grades 7-12, as applicable), requirements per of Ed. Code § 215. Suicide Prevention Lifeline and National Domestic Violence Hotline on at least one side of Student ID cards, as specified in Ed. Code § 215.5	☒	☐
For schools offering an interscholastic athletic program, at least one automated external defibrillator (AED) is onsite, and available at on-campus athletic activities or events per Ed. Code §§ 35179.4 and 35179.6.	☒ ☐ Not applicable	☐
Notes: None.		

Review of Transparency and Stakeholder Information Compliance Items		
The items below are expected to be evident at the charter school to ensure that it operates in a transparent manner and keeps all stakeholders informed. Failure to provide evidence of any of the applicable items below may lead to tiered intervention, as appropriate, and impact the overall rating in the Organizational Management, Programs, and Operations category.		
A charter school cannot receive a rating in this category greater than 3 if any of the items below are not evident.		
Item	**Evident**	**Not Evident**
The following information posted to the school's website: ☒ LCAP, per Ed. Code § 47606.5(h) ☒ Current Board agenda in compliance with Brown Act, per Gov. Code, § 54954.2 (a)(1) and (d). ☒ Policy on Pupil Suicide Prevention per Ed. Code § 234.6 ☒ Title IX information, including a link to CDE's Title IX website per Ed. Code § 234.6 ☒ Policies on anti-discrimination, anti-harassment, anti-intimidation, anti-bullying, and sexual harassment policies, including: anti-cyberbullying procedures, social media anti-bullying procedures, and a link to statewide resources including community-based organizations compiled by CDE, per Ed. Code § 234.6	☒	☐
Provides all stakeholders with appropriate, accessible, and relevant information about individual student and schoolwide academic progress and performance Ed. Code § 47605(c)(5)(C)	☒	☐
Access to approved charter	☒	☐
Documentation of informing parents/guardians about transferability of courses/course credit and eligibility to meet A-G requirements (high schools only), per Ed. Code § 47605	☐	☐
	☒ Not applicable	
Informing parents/guardians of human trafficking prevention resources (grades 6-12), per Ed. Code § 49381	☒	☐
Notification of access to available mental health services (grades K-12), per Ed. Code § 49428.	☒	☐
Charter schools serving any of the grades 6 to 12, shall prominently and conspicuously display a poster that identifies approaches and shares resources regarding pupil mental health in appropriate public areas that are accessible to, and commonly frequented by, pupils, per Ed. Code § 49428.5	☒	☐
	☐ Not applicable	
Notes: None.		

5962	2020-2021					2021-2022					2022-2023				
Ocean Charter	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Cash and Cash Equivalents	0	289,876	225,167	2,227,972	301,701		739,804	796,674	1,532,538	1,532,537		1,492,719	1,445,266	2,142,466	1,811,923
Accounts Receivable	0	1,055,024	1,307,627	1,223,266	1,165,826		740,009	796,907	975,439	1,220,491		1,177,803	1,195,521	1,427,859	1,418,270
Other Current Assets	0	28,869	23,458	22,183	22,183		26,574	24,551	37,066	37,066		38,256	673	0	372,295
Total Current Assets	0	1,373,769	1,556,252	3,473,421	1,489,710		1,506,387	1,618,132	2,545,043	2,790,094		2,708,778	2,641,460	3,570,324	3,602,488
Fixed and Other Assets	0	78,080,994	78,705,349	77,345,938	58,484,926		77,608,963	56,832,464	56,448,486	56,448,486		54,997,749	55,005,947	55,058,605	55,092,760
Total Assets	0	79,454,763	80,261,601	80,819,359	59,974,636		79,115,350	58,450,596	58,993,529	59,238,580		57,706,528	57,647,407	58,628,929	58,695,248
Deferred Outflows of Resources	0	0	0	0	0		0	0	0	0		0	0	0	0
Current Liabilities	0	2,822,722	2,137,999	2,358,192	2,637,520		514,794	651,784	1,688,324	1,811,774		1,798,600	1,402,815	2,120,784	2,117,184
Other Long Term Liabilities	0	10,367,386	11,094,053	11,525,158	11,188,376		11,228,374	11,228,373	11,148,388	11,040,231		10,880,468	10,880,468	10,624,166	10,644,102
Unfunded OPEB Liabilities	0	0	0	0	0		0	0	0	0		0	0	0	0
Total Liabilities	0	13,190,108	13,232,052	13,883,350	13,825,896		11,743,168	11,880,157	12,836,712	12,852,005		12,679,068	12,283,283	12,744,950	12,761,286
Deferred Inflows of Resources	0	0	0	0	0		0	0	0	0		0	0	0	0
Net Assets	0	66,264,655	67,029,549	66,936,009	46,148,740		67,372,182	46,570,439	46,156,817	46,386,575		45,027,459	45,364,124	45,883,979	45,933,962
Total Revenues	12,718,692	11,754,793	11,938,334	10,964,728	11,154,446	6,278,769	8,289,016	8,189,056	7,635,139	8,632,643	6,892,269	7,444,132	7,718,122	8,547,318	8,822,137
Total Expenditures	6,431,328	7,652,344	7,070,989	6,190,925	6,390,573	7,735,266	7,842,910	7,767,356	7,627,061	8,394,808	8,224,642	8,803,248	8,740,572	9,049,913	9,274,750
Net Income / (Loss)	6,287,364	4,102,449	4,867,345	4,773,803	4,763,873	(1,456,497)	446,106	421,700	8,078	237,835	(1,332,373)	(1,359,116)	(1,022,451)	(502,595)	(452,613)
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	6,287,364	4,102,449	4,867,345	4,773,803	4,763,873	(1,456,497)	446,106	421,700	8,078	237,835	(1,332,373)	(1,359,116)	(1,022,451)	(502,595)	(452,613)
Net Assets, Beginning	62,315,179	62,162,206	62,162,206	62,162,206	62,162,204	67,029,549	66,936,009	66,936,009	66,936,009	46,148,740	46,570,439	46,156,817	46,156,817	46,156,817	46,386,575
Adj. for restatement / Prior Yr Adj	(1,796,430)	0	(2)	0	(20,777,337)	991,356	0	(9,933)	(20,787,270)	(20,787,270)	154,812	229,758	229,758	229,758	0
Net Assets, Beginning, Adjusted	60,518,749	62,162,206	62,162,204	62,162,206	41,384,867	68,020,905	66,926,076	46,148,739	46,148,739	46,148,740	46,725,251	46,386,575	46,386,575	46,386,575	46,386,575
Net Assets, End	66,806,113	66,264,655	67,029,549	66,936,009	46,148,740	66,564,408	67,372,182	46,570,439	46,156,817	46,386,575	45,392,878	45,027,459	45,364,124	45,883,979	45,933,962
Unrestricted Net Assets		(1,516,340)	140,538	66,936,009	46,148,740		67,372,182	46,548,126	46,156,817	46,386,575		32,926	45,364,124	45,883,979	45,933,962
Restricted Net Assets		67,780,995	66,889,011	0	0		0	22,313	0	0		44,994,534	0	0	0

5962	Audited Financials					2023-2024					2024-2025				
Ocean Charter	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Cash and Cash Equivalents	301,701	1,532,537	1,811,923	2,472,230	0		2,499,117	2,409,493	2,472,230	2,472,230		2,848,463	2,838,814	0	0
Accounts Receivable	1,165,826	1,220,491	1,418,270	1,260,337	0		836,534	859,464	1,260,338	1,260,337		651,901	593,483	0	0
Other Current Assets	22,183	37,066	372,295	98,314	0		10,068	77,905	130,479	98,314		108,384	103,234	0	0
Total Current Assets	1,489,710	2,790,094	3,602,488	3,830,881	0		3,345,720	3,346,862	3,863,048	3,830,881		3,608,748	3,535,530	0	0
Fixed and Other Assets	58,484,926	56,448,486	55,092,760	53,719,573	0		53,644,589	53,651,564	53,634,038	53,719,573		52,234,716	52,233,982	0	0
Total Assets	59,974,636	59,238,580	58,695,248	57,550,454	0		56,990,309	56,998,426	57,497,086	57,550,454		55,843,464	55,769,512	0	0
Deferred Outflows of Resources	0	0	0	0	0		0	0	0	0		0	0	0	0
Current Liabilities	2,637,520	1,811,774	2,117,184	1,963,485	0		1,696,304	1,658,618	1,696,995	1,963,485		1,351,420	1,330,089	0	0
Other Long Term Liabilities	11,188,376	11,040,231	10,644,102	10,284,504	0		10,384,998	10,370,777	10,370,777	10,284,504		10,218,945	10,215,032	0	0
Unfunded OPEB Liabilities	0	0	0	0	0		0	0	0	0		0	0	0	0
Total Liabilities	13,825,896	12,852,005	12,761,286	12,247,989	0		12,081,303	12,029,396	12,067,772	12,247,989		11,570,364	11,545,120	0	0
Deferred Inflows of Resources	0	0	0	0	0		0	0	0	0		0	0	0	0
Net Assets	46,148,740	46,386,575	45,933,962	45,302,465	0		44,909,006	44,969,030	45,429,314	45,302,465		44,273,099	44,224,392	0	0
Total Revenues	11,154,446	8,632,643	8,822,137	8,801,126	0	7,547,731	7,671,400	7,747,682	8,659,138	8,801,126	7,857,547	7,939,208	7,848,551	0	0
Total Expenditures	6,390,573	8,394,808	9,274,750	9,432,623	0	8,578,833	8,664,193	8,712,614	9,163,788	9,432,623	8,933,773	8,968,575	8,926,626	0	0
Net Income / (Loss)	4,763,873	237,835	(452,613)	(631,497)	0	(1,031,102)	(992,793)	(964,932)	(504,650)	(631,497)	(1,076,227)	(1,029,368)	(1,078,075)	0	0
Operating Transfers In (Out) and Sources / Uses	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Extraordinary Item - Transfer of Net Assets	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Inc / (Dec) in Net Assets	4,763,873	237,835	(452,613)	(631,497)	0	(1,031,102)	(992,793)	(964,932)	(504,650)	(631,497)	(1,076,227)	(1,029,368)	(1,078,075)	0	0
Net Assets, Beginning	62,162,204	46,148,740	46,386,575	45,933,962	0	45,364,124	45,883,979	45,883,979	45,883,979	45,933,962	44,969,030	45,429,314	45,429,314	0	0
Adj. for restatement / Prior Yr Adj	(20,777,337)	0	0	0	0	29,475	17,820	49,983	49,985	0	(28,133)	(126,848)	(126,848)	0	0
Net Assets, Beginning, Adjusted	41,384,867	46,148,740	46,386,575	45,933,962	0	45,393,599	45,901,799	45,933,962	45,933,964	45,933,962	44,940,898	45,302,467	45,302,467	0	0
Net Assets, End	46,148,740	46,386,575	45,933,962	45,302,465	0	44,362,497	44,909,006	44,969,030	45,429,314	45,302,465	43,864,671	44,273,099	44,224,392	0	0
Unrestricted Net Assets	46,148,740	46,386,575	45,933,962	45,302,465	0		44,909,006	44,969,030	45,429,314	45,302,465		44,273,099	44,224,392	0	0
Restricted Net Assets	0	0	0	0	0		0	0	0	0		0	0	0	0

FISCAL OPERATIONS	RATING
Summary of School Performance	4, Accomplished

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

Financial Highlights

The charter school's fiscal condition is positive.

FINANCIAL HIGHLIGHTS					
Ocean Charter	2020-2021 (Audited Actuals)	2021-2022 (Audited Actuals)	2022-2023 (Audited Actuals)	2023-2024 (Audited Actuals)	2024-2025 (Second Interim)
Net Assets[1]	$46,148,740	$46,386,575	$45,933,962	$45,302,465	$44,224,390
Net Income / (Loss)	$4,763,873[1]	$237,835[1]	($452,613)[3]	($631,497)[3]	($1,078,075)[3]
Transfers In / Out	$0	$0	$0	$0	$0
Prior Year Adjustment(s)	($20,777,337)[2]	$0	$0	$0	$0
Cash and Cash Equivalents	$301,701	$1,532,537	$1,811,923	$2,472,230	$2,838,814
Unrestricted Net Assets	$46,148,740	$46,386,575	$45,933,962	$45,302,465	$44,224,390
Norm Enrollment Reported by the School	568	546	552	557	559
FINANCIAL RATIO ANALYSIS					
Fund Reserve (Reserve for Economic Uncertainty) (Unrestricted Net Assets /Total Expenditures) *3% - 5% and greater is recommended (depending on the school's ADA)*	722.14%	552.56%	495.26%	480.27%	495.42%

Cash Reserve Level (Cash Balance/Total Expenditures) *5% and greater is recommended*	4.72%	18.26%	19.54%	26.21%	31.80%
Current Ratio (Working Capital Ratio) (Current Assets/Current Liabilities) *At least 1.2 or 120% is recommended*	56.48%	154.00%	170.15%	195.11%	265.81%
Debt Ratio (Total Liabilities/Total Assets) *Lower than 1.0 or 100% is recommended*	23.05%	21.70%	21.74%	21.28%	20.70%

[1] See **Item 6** in the **Notes Section I** below for further information regarding Ocean Charter's Proposition 1D Grant.

[2] The ($20,777,337) adjustment reflected in the school's Fiscal Year 2020-2021 annual independent audit report was 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.

[3] According to Ocean Charter, the net loss of ($452,613) reported in the school's Fiscal Year 2022-2023 annual independent audit report, the net loss of ($631,497) reported in the school's Fiscal Year 2023-2024 annual independent audit report, and the projected net loss of ($1,078,075) reported in the school's Fiscal Year 2024-2025 Second Interim report were primarily attributed to the $1.5 million in site depreciation (non-cash in nature) resulting from the $58 million Panama site project. Without site depreciation, Ocean's net income for the corresponding fiscal years would be approximately $1M, $821K, and $388K, respectively. Ocean will continue to report net losses due to the large depreciation expense recognized each year from the Panama site project. The project value is depreciating over a 40-year period.

Norm Enrollment Data and Trends

The school's Norm Enrollment history by grade level is summarized below.

Ocean Charter's Norm Day Enrollment History					
Grade Level	**2020-2021**	**2021-2022**	**2022-2023**	**2023-2024**	**2024-2025**
TK*			24	24	19
K*	104	73	53	53	54
1	56	75	51	55	53
2	56	53	72	55	55
3	83	55	56	78	56

4	56	81	53	55	74
5	55	54	82	56	56
6	51	50	52	76	56
7	55	51	54	53	84
8	52	54	55	52	52
Total Enrollment	**568**	**546**	**552**	**557**	**559**
Increase/(Decrease) in Enrollment from Prior Year	**N/A**	**(22)**	**6**	**5**	**2**
Enrollment Growth/(Decrease) (%)	**N/A**	**(3.9%)**	**1.1%**	**0.9%**	**0.4%**

*Prior to FY 2022-2023, TK (Transitional Kindergarten) and K (Kindergarten) counts were reported together. Therefore, the K counts (if applicable) include the TK counts for the school years prior to 2022-2023.

Accumulated Increase/Decrease in Student Enrollment Since 2020-2021	
Accumulated decrease in student enrollment count	(9)
Accumulated decrease in student enrollment percentage	(1.6%)
Current Board-approved enrollment capacity per the school's operative charter as compared to its reported 2024-2025 Norm Enrollment	
Per the approved enrollment capacity per the school's operative charter	532
2024-2025 Norm Enrollment	559
Above approved enrollment capacity count	27
Above approved enrollment capacity percentage	5.1%

As mentioned in the Organizational Management, Programs, and Operations section above, since Ocean Charter is located on a District site, the CSD team has continued to communicate with the school to align its enrollment with the enrollment capacity approved in its operative charter. The CSD will continue to monitor the school's student enrollment through oversight.

Areas of Demonstrated Strength and/or Progress:

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

Areas Noted for Further Growth and/or Improvement:

No significant items noted.

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).

None noted.

Corrective Action Required:

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

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

N/A

Notes:

_I._	_Review of Fiscal Documentation_	_Comments_
1.	FY 2023-2024 Independent Audit Report	
	a. Audit opinion:	Unmodified/Unqualified
	b. Material weaknesses:	None Reported
	c. Deficiencies/Findings:	None Reported
	d. Lack of a Going Concern:	None Reported
	Description (if applicable):	Not applicable

2.	(Only for **new schools** without an audit report on file) The charter school is in its first/second year of operation and there is no independent audit report on file with the CSD.	Not applicable
3.	The 2023-2024 audited and unaudited actuals:	Do not mirror each other
	The explanations provided by the charter school for the variances were reasonable:	Yes
	The 2023-2024 independent audit report is not available as of the date of this report.	Not applicable
4.	Segregation of Duties (SOD) review(s) was/were conducted in-person/virtually at:	Ocean Charter School
		No discrepancies were noted.
5.	Proposition 39 information:	

Per the LAUSD Charter Schools Accounting Unit's record, as of December 31, 2024, Ocean Charter owed $814,796 in Proposition 39 over-allocated space reimbursement fees to LAUSD (consisting of $415,134.72, $364,575.75, and $485,447.16 for Fiscal Years 2016-2017, 2017-2018, and 2018-2019, respectively, less payments of $450,362). The school's 2021-2022 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 authorized LAUSD to deduct the payment from the school's revenue account. The CSD will continue to monitor this matter through oversight.

6.	Proposition 1D information:	

Based on the school's FY 2023-2024 audit report, during the fiscal year ended June 30, 2012, Ocean Charter was awarded $7,543,549 in Charter School Facilities Program funding established by Proposition 1D ([1] notated in the Financial Highlights section above). During the fiscal year ending June 30, 2018, Ocean Charter was awarded an additional $28,521,085 in Facilities Program funding established by Proposition 1D. The balance of $9,735,297 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's FY 2023-2024 independent audit report, the balance of the school's long-term obligations (excluding the current portions, as of June 30, 2024) was $10,284,504 (consisting of $81,806 in Operating Lease Liabilities, $9,461,973 in Proposition 1D, and $740,725 in Notes Payable).

The provisions of Proposition 1D allow Ocean Charter to defer its loan payments until one year after it occupies its new school site. Per Ocean Charter, on January 9, 2018, the school initiated construction on its new school site, which was completed in April 2022, with the Final Notice of Completion recorded on April 28, 2022. Ocean Charter further stated that "the total construction cost of this project was $77,000,000. [Out] of that total, $20,277,475 was for land purchased and then deeded to LAUSD." Accordingly, Ocean Charter's repayment of its loan from the California School Finance Authority (CSFA) commenced in September 2022.

Per ExED (Ocean Charter's back office services provider), 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. Out of the $56.9M construction

project budget, Ocean has spent/paid for $56.6M in costs applied to the construction project through June 2024. Ocean Charter currently has $316,648 remaining in the budget from the augmentation grant to cover any remaining/final costs.

_**II.**_	_**Review of 2024-2025 Fiscal Preparation Guide**_	_**Provided**_	_**Comments**_
1.	Most Current Fiscal Reports Reported to the Board	Yes	
2.	Board Meeting Minutes – Discussion of Fiscal Reports Presented to Board & Board Packet	Yes	
3.	Audit or Fiscal Reports – CalSTRS, CalPERS, USDE, CDE, FCMAT, IRS, SBA, OPEB, etc.	N/A	
4.	Board Meeting Minutes – Approval of 2024-2025 Budget	Yes	
5.	Evidence of Compliance – STRS, PERS, Social Security, Other Benefits	Yes	Benefits offered by the school: STRS, Social Security, and 403B
6.	Board Meeting Minutes – Selection of Independent Auditor	Yes	
7.	Board Meeting Minutes – Discussion of Independent Audit Report	Yes	
8.	Board Meeting Minutes – Discussion of the Most Recent Interim Financial Reports Submitted to LAUSD	Yes	
9.	Board Meeting Minutes – Discussion of Staff or Vendors Complaints	N/A	
10.	Board Meeting Minutes – Discussion of 2023-2024 Annual Performance-Based Oversight Visit Report	Yes	
11.	Current Fiscal Policies and Procedures	Yes	
12.	Board Meeting Minutes – Approval of Fiscal Policies and Procedures	Yes	
13.	Organizational Chart(s)	Yes	
14.	Summary of Total Compensation Paid in FY 2023-2024	Yes	
15.	Related Parties	N/A	
16.	MOUs for CMO Management Fees	Yes	
17.	Board Meeting Minutes – Approval of Management Fees, License Fees, or Any Other Fees	Yes	
18.	Most Current Accounts Payable Aging Report	Yes	

19.	Check Registers (12 months)	Yes	Period spanning from 10/2023 to 9/2024
			Reviewed 18 checks for sample testing
			No discrepancies were noted.
20.	Credit Card Statements and Reconciliations (6 months)	Yes	Period spanning from 4/2024 to 9/2024
			Reviewed 16 credit card transactions for sample testing
			No discrepancies were noted.
21.	Monthly Bank Statements and Reconciliations (6 months)	Yes	Period spanning from 3/2024 to 8/2024
			Reviewed 15 electronic credit/debit transactions for sample testing
			No discrepancies were noted.
22.	Student Body Financial Records (6 months)	N/A	
23.	Capitalized and Non-Capitalized Inventory Listing	Yes	
24a.	Posting of EPA on School's Website	Yes	
24b.	Posting of Audited Financials on School's Website	Yes	
25.	Financing Activities, Loans, Factoring Receivables, Intercompany Transfers/Loans, etc.	Yes	Signed and executed line of credit agreement with Hanmi Bank of up to $1,300,000 that bears interest at the Prime Rate plus 1.00% per annum, or 4.25% per annum, whichever is greater, with a maturity date of 12/3/2025, was provided. Ocean Charter has no outstanding balance as of the writing of this report.
26.	Current Facility Lease Agreements and Board Meeting Minutes – Approval of Lease	N/A	As noted in Notes Section I. Item #6 regarding Proposition 1D information, Ocean Charter is the sole occupant of the District-owned site (12870 Panama St., Los Angeles).

27.	Facilities Plans – Purchase, Lease, Relocation, Expansion, Major Improvements	N/A	
	i. Charter School Name (For CMO Schools):		
	ii. Current School Address:		
	iii. Address of the New/Expanded Property/Construction Site:		
	iv. New or Existing Site:		
	v. Purchase Date or Estimated Purchase Date:		
	vi. Construction Start Date:		
	vii. Estimated Project Completion Date:		
	viii. Projected Total Cost:		
	ix. Cost-to-date Amount:		
	x. Purpose of Project/Construction:		
	xi. Current Project Status:		
	xii. Financing Sources (description/amount):		
	xiii. Estimated Move-In Date:		
28.	Employee Retention Credit	N/A	
29.	Disclosure of Legal Issues	N/A	

Notes: N/A (Provided Column) = indicated by the charter school as not applicable

ANI = Areas Noted for Further Growth and/or Improvement

OO = Other Observations

Fiscal Operations Rubrics

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

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

Existing School 4 (Accomplished)	*To receive a rating of 4 (Accomplished), an existing school, at a minimum, meets all of the Required and Supplemental Criteria listed below.*

REQUIRED CRITERIA

1. Net assets are positive in the two most current annual independent audit reports;
2. The cash balance at the beginning of the school year is positive;
3. The two most current annual independent audit reports show no material weaknesses, deficiencies, and/or findings;
4. If applicable, federal, state, and other public agency audits/reviews (e.g., California State Teachers' Retirement System (CalSTRS), California Public Employees' Retirement System (CalPERS), Fiscal Crisis & Management Assistance Team (FCMAT), United States Department of Education (USDE), California Department of Education (CDE), Internal Revenue Service (IRS), etc.), at the time of the oversight visit, show no outstanding material weaknesses, deficiencies, and/or findings;
5. Vendors and staff are consistently paid in a timely manner;
6. Governing board approves fiscal policies and procedures, at a minimum, once prior to each charter renewal term;
7. Charter school consistently adheres to the governing board-approved fiscal policies and procedures;
8. Governing board adopts the annual budget;
9. Governing board reviews and/or discusses audited financial statements submitted to LAUSD;
10. If applicable, governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD;
11. There is no apparent conflict of interest;
12. The Education Protection Account allocation and expenditures and audited financial statements are posted on the charter school's website;
13. The LCAP is submitted to the appropriate agencies;
14. Reasonable requests for information made by the Charter Schools Division and LAUSD are consistently processed or submitted by the charter school in a timely manner;
15. There are no items cited in Areas Noted for Further Growth and/or Improvement and there are no more than five (5) items cited in Other Observations for the most current year;
16. If applicable (when audited and unaudited actuals do not mirror each other), adequate explanations are provided by the school for significant variances between audited and unaudited actuals, and there are no indications of the school's potential lack of internal controls over financial statements;
17. Proper segregation of duties is consistently in place;
18. If applicable, there are no outstanding fiscal-related tiered intervention notices issued to the school; or the school has no tiered intervention notices as of the oversight report issuance date; and

19. If applicable, all LAUSD Board of Education-approved fiscal benchmark(s) are fully met by the required deadline(s); or the school has no fiscal benchmarks in its current charter term.

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 uncertainties as defined in California Code of Regulations (CCR), Title 5, Section 15450 (5 CCR § 15450 Reserves) (i.e., unrestricted fund balance divided by total expenditures) in the two most current annual independent audit reports;
2. The cash balance at the beginning of the school year is at least 5% of the prior year's expenses in the two most current annual independent audit reports;
3. The school maintains sound short-term financial viability (i.e., current ratio is recommended to be at least 1.2 or 120%) in the two most current annual independent audit reports;
4. The school maintains sound long-term financial sustainability (i.e., debt ratio is recommended to be lower than 1.0 or 100%) in the two most current annual independent audit reports;
5. Enrollment is stable or changing at a manageable rate (e.g., the school still maintains a balanced budget, timely right sizing, etc.);
6. Fiscal reports (e.g., first interim, second interim, unaudited actuals, balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at governing board meetings for review and discussion;
7. The most current annual independent audit report is submitted to the appropriate agencies, including the school's chartering authorizer, by December 15 following the end of the fiscal year (California Education Code 47605(m)), or by the extended deadline granted by the charter authorizer due to extraordinary reason(s) or approved by law; and
8. The preliminary budget, first interim financial report, second interim financial report, and the unaudited actuals report for the preceding fiscal year are submitted to the appropriate agencies, including the school's charter authorizer, pursuant to the timelines established in California Education Code 47604.33(a)(1,3,4,5).

Existing School 3 (Proficient)	*To receive a rating of 3 (Proficient), an existing school, at a minimum, meets all of the Required and at least five (5) of the Supplemental Criteria listed below.*

REQUIRED CRITERIA

1. Net assets are positive in the most current annual independent audit report;
2. The cash balance at the beginning of the school year is positive;
3. The most current annual independent audit report shows no material weaknesses, deficiencies and/or findings;
4. If applicable, federal, state, and other public agency audits/reviews (e.g., CalSTRS, CalPERS, FCMAT, USDE, CDE, IRS, etc.), at the time of the oversight visit, show outstanding findings, and the school is able to demonstrate evidence of remedies in addressing these findings;
5. Vendors and staff are generally paid in a timely manner;
6. Governing board approves fiscal policies and procedures, at a minimum, once prior to each charter renewal term;
7. Charter school generally adheres to the governing board-approved fiscal policies and procedures;

8. Governing board adopts the annual budget;
9. Governing board reviews and/or discusses audited financial statements submitted to LAUSD;
10. If applicable, governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD;
11. There is no apparent conflict of interest;
12. The Education Protection Account allocation and expenditures and audited financial statements are posted on the charter school's website;
13. The LCAP is submitted to the appropriate agencies;
14. Reasonable requests for information made by the Charter Schools Division and LAUSD are generally processed or submitted by the charter school in a timely manner;
15. There are no significant recurring issues cited in the Areas Noted for Further Growth and/or Improvement;
16. If applicable (when audited and unaudited actuals do not mirror each other), at least partial explanations are provided by the school for significant variances between audited and unaudited actuals, and there are no indications of the school's potential lack of internal controls over financial statements;
17. Proper segregation of duties is generally in place;
18. If applicable, the charter school is in the process of resolving outstanding fiscal issues cited in a Notice issued by the CSD as part of its tiered intervention process; and
19. If applicable, all LAUSD Board of Education-approved fiscal benchmark(s) are partially 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 uncertainties as defined in CCR, Title 5, Section 15450 (5 CCR § 15450 Reserves) (i.e., unrestricted fund balance divided by total expenditures) in the most current annual independent audit report;
2. The cash balance at the beginning of the school year is at least 5% of the prior year's expenses in the most current annual independent audit report;
3. The school maintains sound short-term financial viability (i.e., current ratio is recommended to be at least 1.2 or 120%) in the most current annual independent audit report;
4. The school maintains sound long-term financial sustainability (i.e., debt ratio is recommended to be lower than 1.0 or 100%) in the most current annual independent audit report;
5. Enrollment is stable or changing at a manageable rate (e.g., the school still maintains a balanced budget, timely right sizing, etc.);
6. Fiscal reports (e.g., first interim, second interim, unaudited actuals, balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at governing board meetings for review and discussion;
7. The most current annual independent audit report is submitted to the appropriate agencies, including the school's chartering authorizer, by December 15 following the end of the fiscal year (California Education Code 47605(m)) or by the extended deadline granted by the charter authorizer due to extraordinary reason(s) or approved by law; and
8. The preliminary budget, first interim financial report, second interim financial report, and the unaudited actuals report for the preceding fiscal year are submitted to the appropriate agencies, including the school's charter authorizer, pursuant to the timelines established in California Education Code 47604.33(a)(1,3,4,5).

Existing School 2 (Developing)	*An existing school would receive a rating of 2 (Developing) if the charter school is not eligible for the rating of Accomplished or Proficient, but at a minimum, meets all of the Required and at least four (4) of the Supplemental Criteria listed below.*

REQUIRED CRITERIA

1. Net assets are positive in the most current annual independent audit report; net assets are negative with strong trend towards becoming positive (be positive at the end of the third year per the applicable interim financials); or the school's financial condition fluctuates from year to year, with significant net losses, leading to negative net assets in the current fiscal year and/or the foreseeable future fiscal years;
2. The cash balance at the beginning of the school year is positive; and
3. Governing board approves fiscal policies and procedures, at a minimum, once prior to each charter renewal term.

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 uncertainties as defined in CCR, Title 5, Section 15450 (5 CCR § 15450 Reserves) (i.e., unrestricted fund balance divided by total expenditures) in the most current annual independent audit;
2. The cash balance at the beginning of the school year is at least 5% of the prior year's expenses in the most current annual independent audit;
3. The school maintains sound short-term financial viability (i.e., current ratio is recommended to be at least 1.2 or 120%) in the most current annual independent audit;
4. The school maintains sound long-term financial sustainability (i.e., debt ratio is recommended to be lower than 1.0 or 100%) in the most current annual independent audit;
5. Enrollment is stable or changing at a manageable rate (e.g., the school still maintains a balanced budget, timely right sizing, etc.);
6. Fiscal reports (e.g., first interim, second interim, unaudited actuals, balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at governing board meetings for review and discussion;
7. The most current annual independent audit report is submitted to the appropriate agencies, including the school's chartering authorizer, by December 15 following the end of the fiscal year (California Education Code 47605(m)) or by the extended deadline granted by the charter authorizer due to extraordinary reason(s) or approved by law; and
8. The preliminary budget, first interim financial report, second interim financial report, and the unaudited actuals report for the preceding fiscal year are submitted to the appropriate agencies, including the school's charter authorizer, pursuant to the timelines established in California Education Code 47604.33(a)(1,3,4,5).

Existing School ***1 (Unsatisfactory)***	***An existing school would receive a rating of 1 (Unsatisfactory) based on the conditions described below.***

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* above. The charter school was given a certain period of time to address the fiscal concerns of LAUSD (including, but not limited to, repeat material weaknesses, significant deficiencies, and/or significant audit findings disclosed in the charter operator's most recent annual independent audit report, noncompliance with Generally Accepted Accounting Principles (GAAP), applicable law, LAUSD charter policy, and the school's approved charter, conflicts of interest, unresolved significant fiscal management issues, outstanding notices, etc.), 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 and will be noted in the evaluation.

New School ***2 (Developing)***	***A new school would receive a rating of 2 (Developing) if the charter school, at a minimum, meets all of the Required Criteria listed below.***

REQUIRED CRITERIA

1. Interim reports and/or unaudited actuals project positive net assets;
2. Projected debt, if any, is managed efficiently and will not cause the charter school to end the fiscal year with negative net assets. The non-profit organization is financially viable to support the charter school;
3. If enrollment is significantly below the enrollment per the school's *Pupil Estimates for New or Significantly Expanding Charters* report and/or its approved petition budget, the charter school has made significant adjustments in their operations to allow for the reduced income, and submitted a revised viable three-year budget and three-year cash flow projections;
4. Governing board adopts the annual budget;
5. Governing board reviews and discusses the charter school's financial reports as evidenced by the governing board meeting minutes;
6. Reasonable requests for information made by the Charter Schools Division and LAUSD are processed or submitted by the charter school in a timely manner; and
7. The LCAP is submitted to the appropriate agencies.

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

New School *1 (Unsatisfactory)*	*A new school would receive a rating of 1 (Unsatisfactory) based on the conditions described below.*

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 *Developing*. The charter school was given a certain period of time to address the fiscal concerns of LAUSD (including, but not limited to, noncompliance with Generally Accepted Accounting Principles (GAAP), applicable law, LAUSD charter policy, and the school's approved charter, conflicts of interest, unresolved significant fiscal management issues, outstanding notices, etc.), 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 and will be noted in the evaluation.