



# **LOS ANGELES UNIFIED SCHOOL DISTRICT**

## **CHARTER SCHOOLS DIVISION**

### **ANNUAL PERFORMANCE-BASED OVERSIGHT VISIT REPORT**

### **2018-2019 SCHOOL YEAR**

### **FOR**

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#### **MATRIX FOR SUCCESS ACADEMY (MATRIX) 2458**

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Name and Location Code of Charter School

#### **LAUSD Vision**

Every student will receive a quality education in a safe, caring environment, and will be college-prepared and career-ready.

#### **CSD Mission**

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

#### **CSD Core Values**

We believe that our success depends on:

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



<b>Charter School Name:</b>		<b>Matrix for Success Academy</b>			<b>Location Code:</b>	<b>2458</b>
<b>Current Address:</b>				<b>City:</b>	<b>ZIP Code:</b>	<b>Phone:</b>
1010 E. 34th St.				Los Angeles	90011	(323) 897-5971
<b>Current Term of Charter:</b>				<b>LAUSD Board District:</b>		<b>LAUSD District:</b>
July 1, 2018 to June 30, 2023				5		Central
<b>Number of Students Currently Enrolled:</b>		<b>Enrollment Capacity Per Charter:</b>		<b>Grades Currently Served:</b>		<b>Grades To Be Served Per Charter:</b>
160		600		9-12		9-12
<b>Total Number of Staff Members:</b>		<b>12</b>	<b>Certificated:</b>	<b>9</b>	<b>Classified:</b>	<b>3</b>
<b>Charter School's Leadership Team Members:</b>			Cesar Lopez, Executive Director			
<b>Charter School's Contact for Special Education:</b>			Cesar Lopez, Executive Director			
<b>CSD Assigned Administrator:</b>		Christian Mendez			<b>CSD Fiscal Services Manager:</b>	Lourdes Echavarria
<b>Other School/CSD Team Members:</b>		Aida Tatiossian				
<b>Oversight Visit Date:</b>		April 4, 2019			<b>Fiscal Review Date (if different):</b>	N/A
<b>Is school located on a District facility? If so, please indicate the applicable program (e.g. Prop 39, PSC, conversion, etc.):</b>		N/A			<b>LAUSD Co-Location Campus (if applicable):</b>	N/A
					<b>DATE OF CO-LOCATION MEETING WITH OPERATIONS TEAM:</b>	N/A

SUMMARY OF RATINGS			
<i>(4)=Accomplished (3)=Proficient (2)=Developing (1)=Unsatisfactory</i>			
Governance	Student Achievement and Educational Performance	Organizational Management, Programs, and Operations	Fiscal Operations
3	No Rating	3	1



### CHARTER RENEWAL CRITERIA

In accordance with Education Code §§ 47605 and 47607, in order to renew a charter, the District must determine whether the charter school has met the statutory requirements. Pursuant to the requirements of SB 1290, the District “shall consider increases in pupil academic achievement for all groups of pupils served by the charter school as the most important factor in determining whether to grant a charter renewal.” Ed. Code § 47607(a)(3)(A).

### REPORT GUIDE

In conducting oversight as a charter school authorizer, the District places an emphasis on performance and compliance with applicable law, policy, and the approved charter, as well as on the lead fiduciary role of a charter school’s governing board in the overall success of the school for students. Information gathered through oversight serves as part of the school’s ongoing record of performance and provides important data for the CSD, LAUSD Superintendent, and ultimately the LAUSD Board of Education in making informed decisions about charter school authorization. In designing this document, the District has considered California charter school law, as well as the California State Board of Education’s criteria for evaluating charter schools and the National Association of Charter School Authorizers’ *Principles and Standards of Quality Authorizing*. This reporting tool provides guidelines and criteria used by the CSD to observe, record, assess, and reflect with the charter school on school performance as captured during the annual oversight visit process in these four categories:

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

**Student Achievement and Educational Performance** – demonstrating 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 2017-2018*. The “Sources of Evidence” sections below identify key information sources generally relevant to their respective indicators; these lists are not exhaustive, however, and some items may not be applicable to the grades served. Schools may present additional evidence as deemed relevant and appropriate. As needed, CSD staff also may request additional information and/or documentation prior to, during, and/or following the visit.

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



GOVERNANCE	RATING*
<b>Summary of School Performance</b>	3
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p><b>G2: BROWN ACT</b>            The Governing Board complies with most material provisions of the Brown Act.</p> <ul style="list-style-type: none"> <li>Review of the school’s Governing Board (PAZLO Education Foundation) agendas and minutes revealed that Brown Act training occurred on October 6, 2018 by Young, Minney and Carr.</li> <li>The PAZLO Education Foundation governing board meetings for the 2018-2019 academic year were scheduled as follows: July 24, 2018; August 28, 2018; October 6, 2018; November 27, 2018; January 26, 2019; February 26, 2019; March 26, 2019; April 23, 2019; May 28, 2019, and June 18, 2019.</li> <li>Agendas are posted 72 hours in advance of regular meetings and 24 hours in advance of special meetings and include language informing the public of procedures for requesting special accommodations if needed.</li> </ul> <p><b>G5: DATA-BASED DECISION-MAKING</b>            The Governing Board regularly monitors school performance and other internal data to inform decision-making.</p> <ul style="list-style-type: none"> <li>Governing Board meeting minutes reveal that the organization has a standing agenda item (Director’s Update) which includes an Academic Achievement Update which provides the Governing Board with school performance data.</li> <li>Review of the Governing Board agendas and minutes revealed that the Academic Achievement Update topics included the following items: Baseline achievement through the review of initial NWEA assessment results, WASC updates and DPNG (the organization’s on-line learning platform) usage updates.</li> </ul> <p><u>Areas Noted for Further Growth and/or Improvement</u></p> <p><b>G1: GOVERNANCE STRUCTURE AND EVALUATION OF SCHOOL LEADER(S)</b>            The Governing Board has partially implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and an adequately developed system for the evaluation of the school leader(s).</p> <ul style="list-style-type: none"> <li>At the time of the visit, a formal Parent/Community Advisory Committee or English Learner Advisory Committee had not been established. School leadership reports that it has been working with a group of parents this year and that the formal committees will be in place for the 2019-2020 academic year.</li> </ul> <p><u>Corrective Action Required</u>            None noted that require immediate action to remedy concerns indicated in this report.</p>	



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Matrix for Success Academy

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 4/4/2019

Notes:  
None

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



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

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

- Governing Board (composition, structure, roles and responsibilities) committees/councils (for example, SSC and ELAC as applicable), including but not limited to those mandated by laws or regulations
- Evaluation of school’s executive level leadership

Rubric		Sources of Evidence
<b>Performance</b>	<input type="checkbox"/> The Governing Board has fully implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and a highly developed system for the evaluation of the school leader(s) <input type="checkbox"/> The Governing Board has substantially implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and an adequately developed system for the evaluation of the school leader(s) <input checked="" type="checkbox"/> (2) The Governing Board has partially implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and a partially developed system for the evaluation of the school leader(s) <input type="checkbox"/> The Governing Board has not implemented the organizational structure set forth in approved charter or any mandated committees/councils, and no system for the evaluation of the school leader(s)	<input checked="" type="checkbox"/> Organization chart <b>(B1.1)</b> <input checked="" type="checkbox"/> Bylaws <b>(B1.2)</b> <input checked="" type="checkbox"/> Board member roster <b>(B1.3)</b> <input checked="" type="checkbox"/> Board meeting agendas, and minutes <b>(B1.4)</b> <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Evidence of committee/council calendars, agendas, minutes and sign-ins <input checked="" type="checkbox"/> Documentation related to system for evaluation of executive level administrator(s) who reports to the Board. <b>(B1.7)</b> <input type="checkbox"/> Discussion with leadership <input type="checkbox"/> Other: (Specify)

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

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

- Governing Board meetings occur regularly, are conducted openly, and provide opportunity for public participation in accordance with the Brown Act
- Governing Board holds its meetings at a location(s) and in a manner that complies with teleconferencing, closed session, and access and Reasonable Accommodation requirements and the public has access to the meetings from a location(s) within the jurisdictional boundaries of LAUSD, as noted in the charter petition
- Governing Board meeting agendas and minutes are posted and maintained, as appropriate, including on the school’s website and in accordance with the Brown Act and with sufficient specificity

Rubric	Sources of Evidence
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<b>Performance</b>	<input type="checkbox"/> The Governing Board complies with all material provisions of the Brown Act <input checked="" type="checkbox"/> (3)The Governing Board complies with most material provisions of the Brown Act <input type="checkbox"/> The Governing Board complies with some material provisions of the Brown Act <input type="checkbox"/> The Governing Board complies with few material provisions of the Brown Act	<input checked="" type="checkbox"/> Board meeting agendas <b>(B1.4)</b> <input checked="" type="checkbox"/> Board meeting calendar <b>(B1.5)</b> <input checked="" type="checkbox"/> Brown Act training documentation <b>(B1.8)</b> <input checked="" type="checkbox"/> Documentation of the school’s agenda posting procedures <b>(B1.9)</b> <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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**G3: DUE PROCESS - GOVERNANCE QUALITY INDICATOR #3**

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

- Student discipline
- Employee grievances and discipline
- Parent/stakeholder complaint resolution
- Uniform Complaint Procedures

	Rubric	Sources of Evidence
<b>Performance</b>	<input type="checkbox"/> The Governing Board has highly developed systems in place to ensure that the school provides adequate due process, in accordance with applicable law, the charter, and LAUSD charter policy, for students, employees, parents, and the public <input checked="" type="checkbox"/> (3)The Governing Board has well-developed systems in place to ensure that the school provides adequate due process, in accordance with applicable law, the charter, and LAUSD charter policy, for students, employees, parents, and the public <input type="checkbox"/> The Governing Board has partially developed systems in place to ensure that the school provides adequate due process, in accordance with applicable law, the charter, and LAUSD charter policy, for students, employees, parents, and the public <input type="checkbox"/> The Governing Board has minimal or no systems in place to ensure that the school provides adequate due process, in accordance with applicable law, the charter, and LAUSD charter policy, in for students, employees, parents, and the public	<input checked="" type="checkbox"/> Board meeting agendas and minutes <b>(B1.4)</b> <input checked="" type="checkbox"/> Parent-Student Handbook(s) <b>(B1.10)</b> <input checked="" type="checkbox"/> Uniform Complaint Procedure documentation <b>(B1.11)</b> <input checked="" type="checkbox"/> Stakeholder complaint procedure(s) <b>(B1.12)</b> <input checked="" type="checkbox"/> H.R. policies and procedures regarding staff due process <b>(B1.13)</b> <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



**G4: STAFFING - GOVERNANCE QUALITY INDICATOR #4**

*The Governing Board has a system in place to ensure that appropriate employment and other staffing decisions are made in accordance with applicable law and the terms of its approved charter governing qualifications, clearances and credentialing:*

- The Governing Board has established policies and procedures to ensure that faculty, staff, substitute teachers, and other persons providing service in a certificated position, are appropriately credentialed, authorized and/or otherwise qualified for the positions for which they have been employed/contracted and assigned, in accordance with applicable provisions of law and the school’s charter.
- The Governing Board has established policies and procedures to ensure that the school obtains all necessary employee clearances, including criminal background and tuberculosis (TB) clearances, prior to employment, and keeps all clearances current.
- The Governing Board has established policies and procedures to ensure that the school obtains, monitors, and maintains all necessary and appropriate vendor certifications/waivers regarding vendor employee clearances, including criminal background and tuberculosis (TB) clearances.
- The Governing Board has established policies and procedures regarding requirements for school volunteers, 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 per AB 1667.
- The Governing Board has established and monitors policies governing whether and under what circumstances the school may consider, for paid and volunteer service, candidates who have criminal records.

Rubric		Sources of Evidence
<b>Performance</b>	<input type="checkbox"/> The Governing Board has established and monitors comprehensive policies and procedures to ensure staffing in compliance with applicable provisions of law and the charter related to qualifications, clearances, credentialing, and assignment requirements <input checked="" type="checkbox"/> (3)The Governing Board has established and monitors policies and procedures to ensure staffing in compliance with applicable provisions of law and the charter related to qualifications, clearances, credentialing, and assignment requirements <input type="checkbox"/> The Governing Board has established some policies and procedures to ensure staffing in compliance with applicable provisions of law and the charter related to qualifications, clearances, credentialing, and assignment requirements <input type="checkbox"/> The Governing Board has established few or no policies and procedures to ensure staffing in compliance with applicable law staffing in compliance with applicable provisions of law and the charter related to qualifications, clearances, credentialing, and assignment requirements	<input checked="" type="checkbox"/> Parent-Student Handbook(s) <b>(B1.10)</b> <input checked="" type="checkbox"/> H.R. policies and procedures regarding ESSA qualifications, credentialing, and clearance requirements <b>(B1.13)</b> <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with school leadership <input checked="" type="checkbox"/> ESSA Grid <input type="checkbox"/> Other: (Specify)





**G5: DATA-BASED DECISION-MAKING - GOVERNANCE QUALITY INDICATOR #5**

*The Governing Board has a system in place to ensure ongoing:*

- Review and use of academic and other internal school data and information to ensure sound Governing Board decision-making in support of continuous improvement of student achievement, fiscal viability, compliance, and overall public school excellence
- Monitoring of the school's implementation of its LCAP action plans and progress toward LCAP goals

Rubric		Sources of Evidence
<b>Performance</b>	<input type="checkbox"/> The Governing Board regularly monitors school performance and other internal data to inform decision-making <input checked="" type="checkbox"/> (3)The Governing Board monitors school performance and other internal data to inform decision-making <input type="checkbox"/> The Governing Board inconsistently monitors school performance and other internal data to inform decision-making <input type="checkbox"/> The Governing Board seldom monitors school performance and other internal data to inform decision-making	<input checked="" type="checkbox"/> Board meeting agendas and minutes with supporting materials and evidence of school performance and internal other data <b>(B1.4)</b> <input type="checkbox"/> Other evidence of system for Board review and analysis of internal school data to inform decision-making <b>(B1.14)</b> <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with leadership <input type="checkbox"/> Other: (Specify)



**G6: FISCAL CONDITION - GOVERNANCE QUALITY INDICATOR #6**

<p><i>The Governing Board has a system in place to ensure fiscal viability:</i></p> <ul style="list-style-type: none"> <li>The school is fiscally strong and net assets are positive in the prior two independent audit reports.</li> </ul>		
	<b>Rubric</b>	<b>Sources of Evidence</b>
<b>Performance</b>	<input type="checkbox"/> The school is fiscally strong with positive net assets in the prior two independent audit reports <input type="checkbox"/> The school is fiscally stable, with positive net assets in the most current independent audit report <input type="checkbox"/> The school is fiscally weak and net assets are negative in the most current independent audit report, <b>or</b> the school does not have an independent audit report on file with the Charter Schools Division <input checked="" type="checkbox"/> (1)The school is consistently fiscally weak and net assets are negative in the prior two independent audit reports, <b>or</b> the school does not have an independent audit report on file with the Charter Schools Division	<input checked="" type="checkbox"/> Board meeting agendas and minutes <b>(B1.4)</b> <input type="checkbox"/> Other evidence of system for Board review and monitoring of fiscal policies, procedures, budget, and finances <b>(B1.15)</b> <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with leadership <input type="checkbox"/> Independent audit report(s) <input checked="" type="checkbox"/> Other: [Despite the fact that the school has an independent audit report on file with the Charter Schools Division, the 2017-2018 independent audit report did not reflect the school's true operational financial condition, as 2018-2019 is the school's first year of operation. The school projects negative net assets of <b>(\$608,048)</b> on its 2018-2019 Second Interim report. See the Fiscal Operations section below.]



**G7: FISCAL MANAGEMENT AND ACCOUNTABILITY - GOVERNANCE QUALITY INDICATOR #7**

*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.

Rubric		Sources of Evidence
<b>Performance</b>	<input type="checkbox"/> The school adheres to the Governing Board approved fiscal policies and procedures, and does not have any areas noted for improvement <input checked="" type="checkbox"/> (3)The school generally adheres to the Governing Board approved fiscal policies and procedures, but has areas noted for improvement <input type="checkbox"/> The school is not adhering to the Governing Board approved fiscal policies and procedures, and has areas noted for improvement, <b>or</b> has significant fiscal-related issues (e.g., fiscal mismanagement, audit findings, potential conflicts of interest, inadequate cash flow, etc.) <input type="checkbox"/> The school is continuously not adhering to the Governing Board approved fiscal policies and procedures, and has recurring areas noted for improvement, <b>or</b> has significant and recurring fiscal-related issues (e.g., fiscal mismanagement, audit findings, potential conflicts of interest, inadequate cash flow, etc.)	<input checked="" type="checkbox"/> Board meeting agendas and minutes <b>(B1.4)</b> <input type="checkbox"/> Other evidence of system for Board review and monitoring of fiscal policies, procedures, budget, and finances <b>(B1.15)</b> <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with leadership <input type="checkbox"/> Independent audit report(s) <input checked="" type="checkbox"/> Other: (see Fiscal Operations section below)

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

N/A



STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE	RATING*
<b>Summary of School Performance</b>	No Rating
<p><u>Areas of Demonstrated Strength and/or Progress</u></p>	
<p><b>A9: INTERNAL ASSESSMENT</b>            The school has demonstrated developing levels of student achievement and progress as measured by school's internal assessments and other school data that are regularly monitored and analyzed and that reflect moderate growth in student achievement in ELA and Math for the majority of subgroups and grade-levels.</p> <ul style="list-style-type: none"> <li>• The school provided in NWEA MAP assessment data in ELA (Reading and Language Usage) and Math from the Winter assessment results compared to the Spring assessment results which indicated the following change in mean RIT scores:               <ul style="list-style-type: none"> <li>• <b>Math RIT Scores</b>                    The 9<sup>th</sup> grade mean RIT score increased from 216.0 to 226.0                    The 10<sup>th</sup> grade mean RIT score decreased from 204.3 to 200.4                    The 12<sup>th</sup> grade mean RIT score increased from 204.6 to 208.8</li> <li>• <b>Reading RIT Scores</b>                    The 9<sup>th</sup> grade mean RIT score increased from 213.0 to 223.0                    The 10<sup>th</sup> grade mean RIT score decreased from 204.0 to 200.6                    The 12<sup>th</sup> grade mean RIT score increased from 191.0 to 198.7</li> <li>• <b>Language RIT Scores</b>                    The 10<sup>th</sup> grade mean RIT score decreased from 203.6 to 200.8                    The 12<sup>th</sup> grade mean RIT score decreased from 206.5 to 201.3                    (9<sup>th</sup> grade did not have mean RIT scores in Language Usage)</li> </ul> </li> </ul>	
<p><u>Areas Noted for Further Growth and/or Improvement</u>            None.</p>	
<p><u>Corrective Action Required</u>            None noted that require immediate action to remedy concerns indicated in this report.</p>	
<p>Notes:            This section is unrated as the school is in its first year of operation and has not generated enough data to populate the majority of indicators in this section.</p>	
<p><b>*NOTE: Upon the State Board of Education's finalization of California's School Dashboard, CSD will determine implications for the oversight report.</b></p>	



**A1: SBAC SUBGROUP ELA - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #1**

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> <li>• Performance of all subgroups on the CAASPP ELA (students with disabilities, English Learners, and socio-economically disadvantaged students, etc.)(CDE)</li> <li>• In accordance with SB1290, increases in pupil academic achievement for all groups of pupils served by the charter school.</li> </ul>		
	<b>Rubric</b>	<b>Sources of Evidence</b>
<b>Performance</b>	<input type="checkbox"/> All subgroups demonstrated growth in CAASPP ELA performance from 2016/2017 to 2017/2018 <input type="checkbox"/> The majority of subgroups demonstrated growth in CAASPP ELA performance from 2016/2017 to 2017/2018 <input type="checkbox"/> Some subgroups demonstrated growth in CAASPP ELA performance from 2016/2017 to 2017/2018 <input type="checkbox"/> None of the school's subgroups demonstrated growth in CAASPP ELA performance from 2016/2017 to 2017/2018 <input checked="" type="checkbox"/> No assessment of performance for this indicator	<input type="checkbox"/> SBAC report (CDE) <b>(B2.1)</b> <input type="checkbox"/> Other: (Specify)

**A2: SBAC SUBGROUP MATH - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #2**

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> <li>• Performance of all subgroups on the CAASPP Math (students with disabilities, English Learners, and socio-economically disadvantaged students, etc.)(CDE)</li> <li>• In accordance with SB1290, increases in pupil academic achievement for all groups of pupils served by the charter school,</li> </ul>		
	<b>Rubric</b>	<b>Sources of Evidence</b>
<b>Performance</b>	<input type="checkbox"/> All subgroups demonstrated growth in CAASPP Math performance from 2016/2017 to 2017/2018 <input type="checkbox"/> The majority of subgroups demonstrated growth in CAASPP Math performance from 2016/2017 to 2017/2018 <input type="checkbox"/> Some subgroups demonstrated growth in CAASPP Math performance from 2016/2017 to 2017/2018 <input type="checkbox"/> None of the school's subgroups demonstrated growth in CAASPP Math performance from 2016/2017 to 2017/2018 <input checked="" type="checkbox"/> No assessment of performance for this indicator	<input type="checkbox"/> SBAC report (CDE) <b>(B2.1)</b> <input type="checkbox"/> Other: (Specify)



**A3: SBAC SCHOOLWIDE ELA - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #3**

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> <li>Schoolwide ELA data (CDE)</li> </ul>	
Rubric	Sources of Evidence
<p><b>Performance</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The schoolwide percentage of students who Met and Exceeded Standards in 3<sup>rd</sup> – 8<sup>th</sup>, 11<sup>th</sup> Grade on the SBAC in ELA is at a rate higher than the Resident Schools Median</li> <li><input type="checkbox"/> The schoolwide percentage of students who Met and Exceeded Standards in 3<sup>rd</sup> – 8<sup>th</sup>, 11<sup>th</sup> Grade on the SBAC in ELA is at a rate similar to the Resident Schools Median</li> <li><input type="checkbox"/> The schoolwide percentage of students who Met and Exceeded Standards in 3<sup>rd</sup> – 8<sup>th</sup>, 11<sup>th</sup> Grade on the SBAC in ELA is at a rate lower than the Resident Schools Median</li> <li><input type="checkbox"/> The schoolwide percentage of students who Met and Exceeded Standards in 3<sup>rd</sup> – 8<sup>th</sup>, 11<sup>th</sup> Grade on the SBAC in ELA is substantially lower than the Resident Schools Median</li> <li><input checked="" type="checkbox"/> No assessment of performance for this indicator</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> SBAC report (CDE) <b>(B2.1)</b></li> <li><input type="checkbox"/> Review of Data Set LAUSD Office of Data &amp; Accountability</li> <li><input type="checkbox"/> Other: (Specify)</li> </ul>

**A4: SBAC SCHOOLWIDE MATH - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #4**

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> <li>Schoolwide Math data (CDE)</li> </ul>	
Rubric	Sources of Evidence
<p><b>Performance</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The schoolwide percentage of students who Met and Exceeded Standards in 3<sup>rd</sup> – 8<sup>th</sup>, 11<sup>th</sup> Grade on the SBAC in Math is at a rate higher than the Resident Schools Median</li> <li><input type="checkbox"/> The schoolwide percentage of students who Met or Exceeded Standards in 3<sup>rd</sup> – 8<sup>th</sup>, 11<sup>th</sup> Grade on the SBAC in Math is at a rate similar to the Resident Schools Median</li> <li><input type="checkbox"/> The schoolwide percentage of students who Met or Exceeded Standards in 3<sup>rd</sup> – 8<sup>th</sup>, 11<sup>th</sup> Grade on the SBAC in Math is at a rate lower than the Resident Schools Median</li> <li><input type="checkbox"/> The schoolwide percentage of students who Met or Exceeded Standards in 3<sup>rd</sup> – 8<sup>th</sup>, 11<sup>th</sup> Grade on the SBAC in Math is substantially lower than the Resident Schools Median.</li> <li><input checked="" type="checkbox"/> No assessment of performance for this indicator</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> SBAC report (CDE) <b>(B2.1)</b></li> <li><input type="checkbox"/> Review of Data Set LAUSD Office of Data &amp; Accountability (ODA)</li> <li><input type="checkbox"/> Other: (Specify)</li> </ul>

**A5: ENGLISH LEARNER RECLASSIFICATION - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #5**

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> <li>English Learner reclassification rate for 2017-2018 (CDE)</li> </ul>
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Rubric		Sources of Evidence
<b>Performance</b>	<input type="checkbox"/> The school reclassifies English Learners at a rate higher than the Resident Schools Median <input type="checkbox"/> The school reclassifies English Learners at a rate similar to the Resident Schools Median <input type="checkbox"/> The school reclassifies English Learners at a rate lower than the Resident Schools Median <input type="checkbox"/> The school did not reclassify English Learners <input checked="" type="checkbox"/> No assessment of performance for this indicator	<input type="checkbox"/> Reclassification report (CDE) <b>(B2.1)</b> <input type="checkbox"/> CELDT/ELPAC Criterion reports (CDE) <b>(B2.3)</b> <input type="checkbox"/> Other: (Specify)

**A6: “AT RISK” ENGLISH LEARNERS – (ELEMENTARY AND SECONDARY SCHOOLS) STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #6**

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

- Providing supports for At-Risk English Learners 2017-2018 (CDE)

Rubric		Sources of Evidence
<b>Performance</b>	<input type="checkbox"/> The school’s percentage of “At Risk” English Learners is at rate lower than the Resident Schools Median <input type="checkbox"/> The school’s percentage of “At Risk” English Learners is at a rate similar to the Resident Schools Median <input type="checkbox"/> The school’s percentage of “At Risk” English Learners is at a rate higher than the Resident Schools Median <input type="checkbox"/> The school’s percentage of “At Risk” English Learners is at a rate that is substantially higher than the Resident Schools Median <input checked="" type="checkbox"/> No assessment of performance for this indicator	<input type="checkbox"/> “At-Risk” by Grade report (CDE): 2017-2018 <b>(B2.1)</b>

**A7: LONG TERM ENGLISH LEARNERS (LTELs) - (SECONDARY SCHOOLS) - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #7**

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

- Providing supports for Long Term English Learners 2017-2018 (CDE)

Rubric		Sources of Evidence



<b>Performance</b>	<input type="checkbox"/> The school's percentage of LTELs is at rate lower than the Resident Schools Median <input type="checkbox"/> The school's percentage of LTELs is at a rate similar to the Resident Schools Median <input type="checkbox"/> The school's percentage of LTELs is at a rate higher than the Resident Schools Median <input type="checkbox"/> The school's percentage of LTELs is at a rate that is substantially higher than the Resident Schools Median <input checked="" type="checkbox"/> No assessment of performance for this indicator	<input type="checkbox"/> Long-Term English Learners (LTEL) by Grade report (CDE): (2017-2018) <b>(B2.1)</b>
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**A8: FOUR-YEAR COHORT GRADUATION RATE - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #8**

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

- Four-Year Cohort Graduation Rate (CDE) **(high schools only)**

	Rubric	Sources of Evidence
<b>Performance</b>	<input type="checkbox"/> The school's Four-Year Cohort Graduation Rate is at a rate higher than Resident Schools Median <input type="checkbox"/> The school's Four-Year Cohort Graduation Rate is at a rate similar to the Resident Schools Median <input type="checkbox"/> The school's Four-Year Cohort Graduation Rate is at a rate lower than the Resident Schools Median <input type="checkbox"/> The school's Four-Year Cohort Graduation Rate is at a rate substantially lower than the Resident Schools Median <input checked="" type="checkbox"/> No assessment of performance for this indicator	<input type="checkbox"/> Four-Year Cohort Graduation Rate (CDE) <b>(B2.1)</b> <input type="checkbox"/> Other: (Specify)  A-G passing grade requirement (e.g. C or D) <b>(CSD internal use only)</b>

**\*INDICATOR A9 IS ONLY APPLICABLE TO NEW CHARTER SCHOOLS WHICH DO NOT HAVE CAASPP (SBAC) SCORES AND CHARTER SCHOOLS WHICH SERVE GRADE LEVELS K, 1, 2, 9, AND 10 (THE GRADE LEVELS WHICH ARE NOT ADMINISTERED THE CAASPP).**

**A9: INTERNAL ASSESSMENT (Grades K, 1, 2, 9, 10 and New Charter Schools) - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #9**

*The school demonstrates student academic achievement, including progress towards closing the achievement gap, for grades K, 1, 2, 9 and 10 or as a new school with no CAASPP data as measured by:*

- The school's internal assessments (with analysis of results) by subgroups and grade-levels
- Other academic achievement data gathered or produced by the school, such as Advanced Placement examination participation and passage rates, A-G requirements progress and completion rates, high school graduation rates, and college acceptance rates
- Results of internal assessments show growth in student achievement in ELA and Math





*NOTE: For purposes of evaluation of school performance for this indicator, the CSD will consider data derived from assessments for which the school can provide evidence of validity/reliability. For commonly used and recognized assessments this would not be necessary (for example, NWEA, DIBELS, Stanford 10, Illuminate, or SBAC Interim assessments).*

	Sources of Evidence
<p style="text-align: center;"><b>Rubric</b></p> <p><b>Performance</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The school has demonstrated accomplished levels of student achievement and progress as measured by school's internal assessments and other school data that are regularly monitored and analyzed and that reflect significant growth in student achievement in ELA and Math for all subgroups in all grade-levels</li> <li><input type="checkbox"/> The school has demonstrated proficient levels of student achievement and progress as measured by school's internal assessments and other school data that are regularly monitored and analyzed and that reflect moderate growth in student achievement in ELA and Math for the majority of subgroups and grade-levels.</li> <li><input checked="" type="checkbox"/> (2)The school has demonstrated developing levels of student achievement and progress as measured by school's internal assessments and other school data that are regularly monitored and analyzed and that reflect limited growth in student achievement in ELA and Math for some subgroups and grade-levels</li> <li><input type="checkbox"/> The school has demonstrated unsatisfactory levels of student achievement and progress as measured by school's internal assessments and other school data and that reflect no growth or a decline in student achievement in ELA and Math for the majority of subgroups and grade-levels, or the school has not collected and/or analyzed and monitored internal assessment or other academic achievement data.</li> <li><input type="checkbox"/> No assessment of performance for this indicator.</li> </ul>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Internal academic performance and progress data and information <b>(B2.2)</b></li> <li><input type="checkbox"/> School Internal Assessment Data Report or equivalent <b>(B2.2)</b></li> <li><input type="checkbox"/> Other: (Specify)</li> </ul>



**CALIFORNIA SCHOOL DASHBOARD STATE PRIORITIES**

**Summary of School Performance**

\*Indicators A10-A19 reflect the school’s ratings on the Dashboard. For Indicators A10 –A19 the school’s ratings on the California School Dashboard will not impact the overall Student Achievement and Educational Performance Rating for 2018-2019 oversight but will provide informational areas of focus. California School Dashboard Indicators will not figure into 2018-2019 oversight ratings.

*Blue Green Yellow Orange Red*

**A10: Priority 4-3.1 Student Achievement Academic Indicator (Grades 3-8) Distance from Level 3 English Language Arts**

The school has achieved the performance level of  N/A

**A11: Priority 4-3.2 Student Achievement Academic Indicator (Grades 3-8) Distance from Level 3 Mathematics**

The school has achieved the performance level of  N/A

**A12: Priority 4-3.5 Student Achievement English Learner Progress Indicator**

The school has achieved the performance level of  N/A

**A13: Priority 5-3.7 Student Engagement- Chronic Absenteeism Indicator**

The school has achieved the performance level of  N/A

*\*this indicator will be available Fall 2018*

**A14: Priority 6-3.8 School Climate- Suspension Rate (K12) Indicator**

The school has achieved the performance level of  N/A



**HIGH SCHOOLS ONLY:**

**A16: Priority 4-3.3 Student Achievement Academic Indicator (Grade 11) Distance from Level 3 English Language Arts**

The school has achieved the following status N/A

**A17: Priority 4-3.4 Student Achievement Academic Indicator (Grade 11) Distance from Level 3 Mathematics**

The school has achieved the following status N/A

**A18: Priority 5-3.6 Student Engagement-Graduation Rate Indicator**

The school has achieved the performance level of N/A

**A19: Priority 7 & 8-3.9 Access to and Outcomes in a Broad Course of Study-College/Career Indicator**

The school has achieved the following status N/A

**NOTES:**

This section is not applicable as the school is in its first year of operation and has not generated enough data to populate this section.

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

N/A



ORGANIZATIONAL MANAGEMENT, PROGRAMS, AND OPERATIONS	RATING*
<b>Summary of School Performance</b>	3
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p><b>O3: STANDARDS-BASED INSTRUCTION</b>            The school has implemented grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS</p> <ul style="list-style-type: none"> <li>The scope of classroom observations was based on areas of focus identified in consultation with the charter school’s leadership. The three focus areas for classroom observations were: 1) Implementation of the Diploma Plus platform; 2) Integration of student’s Personal Success Plan; and 3) Use of assessments. Classroom observations revealed that personalized instruction occurs through the online Diploma Plus platform. Each student in the independent study program has a Personal Success Plan in addition to each student’s Master Agreement. All resources and scaffolds are part of the Diploma Plus platform. Additionally, formative and summative assessments are taken within the platform and are immediately accessible to teachers for progress monitoring.</li> <li>The school’s WASC visit took place on February 20, 2019 and the school was granted Initial Accreditation Status through June 30, 2012.</li> </ul> <p><b>O5: IMPLEMENTATION OF KEY FEATURES OF EDUCATIONAL PROGRAM</b>            The school has substantially implemented the key features of the educational program described in the charter</p> <ul style="list-style-type: none"> <li>Discussion with school leadership, classroom observations and discussion with students revealed that the school has implemented the key features of the educational program including:               <ul style="list-style-type: none"> <li>Providing a laptop to every student in order to access course, submit work products, and take assessments through the school’s Diploma Plus online platform.</li> <li>Creation and implementation of the school’s Diploma Plus online learning management and content delivery platform, which is has been developed by the school for the courses needed by the students. School leadership reports that courses are continually being developed based on student course needs.</li> <li>Staffing an appropriately credentialed teacher in each of the core subjects offered by the school.</li> <li>School leadership reports that it is currently in the process of applying for Dashboard Alternative School Status (DASS) designation and has submitted Part 1 of the DASS application. Note: The DASS program replaces the previously administered Alternative Schools Accountability Model (ASAM) program.</li> </ul> </li> </ul> <p><b>O8: PROFESSIONAL DEVELOPMENT</b>            The school has implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter</p> <ul style="list-style-type: none"> <li>Review of documents contained in Binder 3 revealed the that the school’s staff engaged in professional development related to the school’s instructional model including the following topics: Training on Diplomas Plus; Review Student Case Studies; Master Agreements and Maintaining Them; Matrix</li> </ul>	



Petition for Staff; Design for Equity; Mind, Brain, and Education; California Independent Studies Program Compliance Policy; Integrated Rubrics Overview; Building Lessons; Enrollment/Claiming ADA; and NWEA testing to name a few.

#### Areas Noted for Further Growth and/or Improvement

#### **O1: SCHOOL SAFETY AND OPERATIONS: SCHOOL SAFETY PLAN AND PROCEDURES**

The school has a partially developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety

- During classroom walkthroughs on the day of the oversight visit, emergency supplies were available that included first aid kits, flashlights, emergency toilet provisions and the charter school also provided evidence of having emergency supplies and provisions for prolonged multi-day emergency occurrences, however, evacuation maps were not specific to the classrooms. Per school leadership, all maps will be updated to clearly specify the location of the classroom with respect to the exit routes.
- Documents reviewed in Binder 3 evidenced that on March 28, 2019, a lockdown drill occurred and on October 8, 2018, an earthquake drill occurred. Per school leadership, a fire drill was been planned to take place on April 25, 2019.
- School leadership reports that it is in the process of creating a system for the accounting of students in the event of an emergency based on the Daily Master instead of traditional classroom rosters given the school's independent study instructional model.

#### **O2: HEALTH AND SAFETY**

The school has a partially developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety for Certificates of Occupancy, immunization, health screenings and emergency epi-pens

- At the time of visit, the school had not provided health screenings or secured emergency epi-pens. School leadership reports that it is in the process of contracting with a vendor for the administration of hearing screenings moving forward. School leadership also reports it is in the process of securing emergency epi-pens and has provided training for its staff in the use of epi-pens.

#### **O9: STAKEHOLDER COMMUNICATION AND INVOLVEMENT**

The school has a partially developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns

- At the time of the visit, the school was in the process of establishing its Parent/Community Advisory Committee as well as its English Learner Advisory Committee. School leadership reports that it has been working with a group of parents this year and that the formal committees will be in place for the 2019-2020 academic year.

#### **O7: SCHOOL CLIMATE AND STUDENT DISCIPLINE**

The school has a partially developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights



- At the time of the visit, review of Binder 3 did not provide evidence of alternatives to suspension or of a system of tiered interventions. School leadership reports that the school is in the process of developing its schoolwide Positive Behavior Intervention and Support (PBIS) plan and will implement its plan at the start of the 2019-2020 academic year.

Corrective Action Required

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

Notes:

None

**\*NOTE: A charter school shall receive a rating of 1 in this category for any of the following reasons: (1) Failed to have Health, Safety, and Emergency Plan in place; (2) Failed to conduct child abuse mandated reporter training in accordance with AB 1432; (3) Failed to complete criminal background clearances for all new staff (as defined on the ESSA Grid) prior to employment; or (4) Failed to obtain DOJ clearance certification, as appropriate, from a vendor. A charter school cannot receive a rating in this category greater than 2 if any teacher of the core instructional program is not appropriately credentialed and assigned per legal requirements and the school's current approved charter.**

**O1: SCHOOL SAFETY AND OPERATIONS: SCHOOL SAFETY PLAN AND PROCEDURES - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #1**

***The school has a system in place to ensure that:***

- The school has a current site-specific comprehensive Health, Safety, and Emergency Plan  
(Note: for co-locations, the charter school complies with the District school's Health, Safety and Emergency Plan)
- The school is able and prepared to implement its emergency procedures in the event of a natural disaster or other emergency (includes threat assessment protocol)
- School staff and other mandated reporters working on behalf of the school receive timely training on child abuse awareness and reporting in accordance with the requirements of AB 1432
- School staff receives annual training on the handling of bloodborne pathogens
- The school has a Visitor's policy and it's visible in the main office
- A Pupil Suicide Prevention Policy (grades 7-12) is in place, in compliance with AB 2246

Rubric	Sources of Evidence
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<b>Performance</b>	<input type="checkbox"/> The school has a highly developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety <input type="checkbox"/> The school has a well-developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety <input checked="" type="checkbox"/> (2) The school has a partially developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety <input type="checkbox"/> The school has a minimal or no system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety	<input checked="" type="checkbox"/> Parent-Student Handbook(s) <b>(B1.10)</b> <input checked="" type="checkbox"/> Comprehensive Health, Safety, and Emergency Plan <b>(B3.1b)</b> <input checked="" type="checkbox"/> Evacuation route maps <b>(B3.1b)</b> <input checked="" type="checkbox"/> Documentation of emergency drills and training <b>(B3.1c)</b> <input type="checkbox"/> Evidence of provision and location of onsite emergency supplies <b>(B3.1c)</b> <input checked="" type="checkbox"/> Evidence of AB 2246 implementation (grades 7-12) <b>(B3.1e)</b> <input checked="" type="checkbox"/> Child abuse mandated reporter training documentation <b>(B3.1d and B3A.4)</b> <input checked="" type="checkbox"/> Bloodborne pathogens training documentation <b>(B3.13 and B3A.4)</b> <input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2018-2019</i> (“ESSA Grid”) <b>(B3A)</b> <input checked="" type="checkbox"/> Site/classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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**O2: HEALTH AND SAFETY - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #2**

*The school has a system in place to ensure that:*

- For each school site, the school has a current site-specific Certificate of Occupancy or equivalent that authorizes the current use of the site
- School provides documentation of student immunization and
- School provides documentation of health screening per applicable law and terms of the charter
- School maintains an emergency epinephrine auto-injectors (“epi-pen”) onsite and has provided training to volunteer staff member(s) in the storage and emergency use of the epi-pen

<b>Rubric</b>	<b>Sources of Evidence</b>
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<b>Performance</b>	<input type="checkbox"/> The school has a highly developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety for Certificates of Occupancy, immunization, health screenings and emergency epi-pens <input type="checkbox"/> The school has a well-developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety for Certificates of Occupancy, immunization, health screenings and emergency epi-pens <input checked="" type="checkbox"/> (2) The school has a partially developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety for Certificates of Occupancy, immunization, health screenings and emergency epi-pens <input type="checkbox"/> The school has a minimal or no system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety for Certificates of Occupancy, immunization, health screenings and emergency epi-pens	<input checked="" type="checkbox"/> Parent-Student Handbook(s) <b>(B1.10)</b> <input checked="" type="checkbox"/> Certificate of Occupancy or equivalent <b>(B3.2a)</b> <input type="checkbox"/> Evidence of student immunization <b>(B3.2b)</b> <input type="checkbox"/> Evidence of health screening <b>(B3.2b)</b> <input type="checkbox"/> Epi-pen documentation <b>(B3.2c)</b> <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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**O3: STANDARDS-BASED INSTRUCTION - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #3**

<p><i>The school has:</i></p> <ul style="list-style-type: none"> <li>• Implemented standards-based instruction schoolwide in accordance with the California academic content standards, including the California Common Core State Standards (CA CCSS), that are applicable to the grade levels served</li> <li>• Demonstrated evidence of implementation of the California Next Generation Science Standards</li> <li>• Obtained WASC accreditation <b>(high schools only)</b></li> <li>• Implemented a system to monitor student progress toward and completion of graduation and A-G requirements <b>(high schools only)</b></li> <li>• Received UC/CSU approval of courses (UC Doorways) <b>(high schools only)</b></li> </ul>	
<b>Rubric</b>	<b>Sources of Evidence</b>





<b>Performance</b>	<input type="checkbox"/> The school has fully-implemented grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS <input checked="" type="checkbox"/> (3)The school has substantially implemented grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS <input type="checkbox"/> The school has partially implemented grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS <input type="checkbox"/> The school has minimally implemented, or not at all, grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS	<input checked="" type="checkbox"/> Evidence of standards-based instructional program <b>(B3.3a)</b> <input checked="" type="checkbox"/> Evidence of implementation of CA NGSS <b>(B3.3a)</b> <input checked="" type="checkbox"/> LCAP <b>(B3.3b)</b> <input checked="" type="checkbox"/> Evidence of technology readiness to administer CAASPP assessments <b>(B3.3c) *new schools only</b> <input checked="" type="checkbox"/> WASC documentation <b>(B3.3d)</b> <input type="checkbox"/> UC Doorways course approval documentation <b>(B3.3d)</b> <input type="checkbox"/> Evidence of implementation of Transitional Kindergarten <b>(B3.3i)</b> <input checked="" type="checkbox"/> Professional development documentation <b>(B3.4b)</b> <input checked="" type="checkbox"/> Classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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**O4: MEETING THE NEEDS OF ALL STUDENTS; SUBGROUP DATA ANALYSIS - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #4**

<p><b>The school:</b></p> <ul style="list-style-type: none"> <li>• Implements the differentiation, intervention, and other instructional strategies and approaches described in the charter designed to meet the learning needs of all students, including all subgroups identified in the school’s LCAP and by CDE</li> <li>• Disaggregates and analyzes data on a regular basis to address individual student needs</li> <li>• Implements, monitors, and modifies, as appropriate, its Master Plan for English Learners (EL identification, designated and integrated ELD instruction, progress monitoring, assessment, and reclassification)</li> <li>• Has appointed a designee to assist and support foster youth</li> </ul>	
<b>Rubric</b>	<b>Sources of Evidence</b>



<b>Performance</b>	<input type="checkbox"/> The school has fully implemented and monitors the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and modifies instruction based on data analysis <input checked="" type="checkbox"/> The school has substantially implemented and monitors the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and generally modifies instruction based on data analysis <input type="checkbox"/> The school has partially implemented the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and partially modifies instruction based on data analysis <input type="checkbox"/> The school has minimally implemented, or not at all, the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and does not consistently modify instruction based on data analysis	<input type="checkbox"/> Evidence of standards-based instructional program <b>(B3.3a)</b> <input checked="" type="checkbox"/> LCAP <b>(B3.3b)</b> <input checked="" type="checkbox"/> Professional development documentation <b>(B3.4b)</b> <input checked="" type="checkbox"/> Evidence of intervention and support for all students, including but not limited to foster youth, at-risk students, and high performing students <b>(3.3j)</b> <input checked="" type="checkbox"/> Implementation of the school's English Learner Master Plan <b>(B3.3b)</b> <input checked="" type="checkbox"/> Evidence of implementation of data analysis system program <b>(B2.2)</b> <input checked="" type="checkbox"/> School Internal Assessment Data Report, or equivalent <b>(B2.2)</b> <input checked="" type="checkbox"/> Classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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**O5: IMPLEMENTATION OF KEY FEATURES OF EDUCATIONAL PROGRAM - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #5**

<i>The school has implemented the key features components of the educational program described in the school's charter</i>		
<b>Rubric</b>		<b>Sources of Evidence</b>
<b>Performance</b>	<input type="checkbox"/> The school has fully implemented the key features of the educational program described in the charter <input checked="" type="checkbox"/> The school has substantially implemented the key features of the educational program described in the charter <input type="checkbox"/> The school has partially implemented the key features of the educational program described in the charter <input type="checkbox"/> The school has minimally implemented, or not at all, the key features of the educational program described in the charter	<input checked="" type="checkbox"/> Professional development documentation <b>(B3.4b)</b> <input checked="" type="checkbox"/> Evidence of implementation of key features of educational program <b>(B3.3k)</b> <input checked="" type="checkbox"/> Classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



**O6: SPECIAL EDUCATION - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #6**

*The school has a system in place to ensure that the school:*

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

	Rubric	Sources of Evidence
<b>Performance</b>	<input type="checkbox"/> The school has a highly developed system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements, including the Modified Consent Decree <input checked="" type="checkbox"/> (3)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, including the Modified Consent Decree <input type="checkbox"/> The school has a partially developed system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements, including the Modified Consent Decree <input type="checkbox"/> The school has a minimal or no system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements, including the Modified Consent Decree	<input checked="" type="checkbox"/> Parent-Student Handbook(s) <b>(B1.10)</b> <input checked="" type="checkbox"/> Professional development documentation <b>(B3.4b)</b> <input checked="" type="checkbox"/> Evidence of intervention and support for students with disabilities <b>(B3.3j)</b> <input type="checkbox"/> Self-Review Checklist <b>(B3.4a)</b> <input type="checkbox"/> Other special education documentation <b>(B3.4a)</b> <input checked="" type="checkbox"/> Consultation with Charter Operated Programs office <input checked="" type="checkbox"/> Welligent reports and/or other MCD documentation, including from the Division of Special Education <b>(B3.4a)</b> <input checked="" type="checkbox"/> Classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)

**O7: SCHOOL CLIMATE AND STUDENT DISCIPLINE - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #7**

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

- Align with the principles of the District's Discipline Foundation Policy and School Climate Bill of Rights Resolution, including but not limited to, tiered behavior intervention, alternatives to suspension, and schoolwide positive behavior support, data monitoring and, includes a discipline system complaint process
- Provide positive opportunities for student wellness, growth and success, aimed at making the school safe, welcoming, supportive and inclusive
- Minimize discretionary suspensions and expulsions
- Reduce or eliminate suspension disproportionality for student subgroups

	Rubric	Sources of Evidence



<b>Performance</b>	<input type="checkbox"/> The school has a highly developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights <input type="checkbox"/> The school has a well-developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights <input checked="" type="checkbox"/> (2)The school has a partially developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights <input type="checkbox"/> The school has a minimally developed or no school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights	<input checked="" type="checkbox"/> Parent-Student Handbook(s) <b>(B1.10)</b> <input type="checkbox"/> LCAP <b>(B3.3b)</b> <input checked="" type="checkbox"/> Professional development documentation <b>(B3.4b)</b> <input type="checkbox"/> Evidence of implementation of school climate and student discipline system that aligns with Discipline Foundation Policy and School Climate Bill of Rights principles <b>(B3.4c)</b> <input type="checkbox"/> Evidence of implementation of tiered behavior intervention, such as SST/COST <b>(B3.4c)</b> <input type="checkbox"/> Evidence of implementation of alternatives to suspension <b>(B3.4c)</b> <input type="checkbox"/> Evidence of implementation of schoolwide positive behavior support system <b>(B3.4c)</b> <input checked="" type="checkbox"/> Evidence of data monitoring <b>(B3.4c)</b> <input type="checkbox"/> LAUSD ODA suspension and expulsion data reports <b>(B2.1)</b> <input type="checkbox"/> Interview of stakeholders <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify) <input type="checkbox"/> Suspension rates, and disproportionality rates
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**O8: PROFESSIONAL DEVELOPMENT - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #8**

<p><b>The school:</b></p> <ul style="list-style-type: none"> <li>• Has a schoolwide professional development plan for teachers and other staff that supports the educational program set forth in the charter and targets identified needs</li> <li>• Provides faculty and other instructional staff with professional development opportunities to improve instructional practice</li> <li>• Provides opportunities for teachers to collaborate regularly for the purpose of planning and improving curriculum and instruction</li> </ul>	
<b>Rubric</b>	<b>Sources of Evidence</b>



<b>Performance</b>	<input type="checkbox"/> The school has fully implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter <input checked="" type="checkbox"/> (3)The school has implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter <input type="checkbox"/> The school has partially implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter <input type="checkbox"/> The school has not implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter	<input type="checkbox"/> LCAP <b>(B3.3b)</b> <input checked="" type="checkbox"/> Professional development documentation (e.g. professional development calendar, agendas and sign-ins) <b>(B3.4b)</b> <input type="checkbox"/> Interview of teachers and/or other staff <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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**O9: STAKEHOLDER COMMUNICATION AND INVOLVEMENT - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #9**

<p><i>The school has a stakeholder communication system for gathering input, facilitating and encouraging involvement, sharing information, and resolving concerns, which:</i></p> <ul style="list-style-type: none"> <li>Engages in communication that notifies parents and other stakeholders of the process for resolving concerns, including how they may contact board members, and supports students, families, and other stakeholders in effectively resolving concerns</li> <li>Provides all stakeholders (e.g., parents/guardians, students, and teachers) with appropriate, accessible and relevant information about individual student and schoolwide academic progress and performance</li> <li>Informs parents of high school students about transferability of courses to other public high schools and the eligibility of courses to meet college entrance requirements <b>(high schools only)</b></li> <li>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</li> </ul>	
<b>Rubric</b>	<b>Sources of Evidence</b>



<b>Performance</b>	<input type="checkbox"/> The school has a highly developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns <input type="checkbox"/> The school has a well-developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns <input checked="" type="checkbox"/> (2)The school has a partially developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns <input type="checkbox"/> The school has a minimal or no stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns	<input checked="" type="checkbox"/> Parent-Student Handbook (B1.10) <input type="checkbox"/> LCAP (B3.3b) <input type="checkbox"/> Evidence of stakeholder consultation (B3.4d) <input type="checkbox"/> Evidence of parent/stakeholder involvement and engagement (B3.4d) <input type="checkbox"/> Evidence of sharing accessible and relevant information about individual student and schoolwide academic progress and performance with all stakeholders as appropriate (B3.4d) <input checked="" type="checkbox"/> Evidence of communication to parents and other stakeholders of complaint resolution process(es) (B3.4d) <input checked="" type="checkbox"/> Evidence that parents are informed about transferability of courses/course credit and eligibility to meet A-G requirements (B3.4d) <input checked="" type="checkbox"/> Evidence of provision of stakeholder access to school's approved charter (B3.4d) <input type="checkbox"/> Interview of stakeholders <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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**O10: STAKEHOLDER COMMUNICATION AND TRANSPARENCY- ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #10**

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

- Information is easily accessible to the public and school stakeholders
- UCP and all complaint procedures
- Title IX information in accordance with SB 1375\*\*
- AB 2246 Suicide Prevention applicable posting (Gr 7-12)
- Applicable categories described in Charter School Transparency Resolution

\*\*required on website

Rubric	Sources of Evidence
<input type="checkbox"/> The school has a highly developed communication system to share information with stakeholders, that is easily accessible via its documents available both manually, electronically and on its website	<input checked="" type="checkbox"/> Review of the availability of information to the public/stakeholders (B3.4e) for: <ul style="list-style-type: none"> <li>• SB 1375 Information</li> <li>• UCP Procedure and Forms</li> </ul>



<input checked="" type="checkbox"/> (3)The school has a well-developed communication system to share information with stakeholders via its documents available both manually, electronically and on its website <input type="checkbox"/> The school has a partially developed communication system to share information with stakeholders via its documents available manually/electronically or on its website <input type="checkbox"/> The school has a minimally developed communication system to share information with stakeholders with limited to no availability of documents manually/electronically or on its website	<ul style="list-style-type: none"> <li>• Complaint Forms</li> <li>• AB 2246 (grades 7-12)</li> <li>• LCAP</li> <li>• Financial Audit</li> <li>• Student Demographics</li> <li>• Student Achievement Information</li> </ul>
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**O11: EVALUATION OF SCHOOL STAFF - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #11**

*The school has a system in place for the evaluation of school staff designed to ensure that:*

- the school’s educational program yields high student achievement
- the school complies with all applicable legal requirements

	Sources of Evidence				
<table border="1" style="width: 100%;"> <tr> <td style="text-align: center; vertical-align: middle;"><b>Rubric</b></td> <td></td> </tr> <tr> <td style="text-align: center; vertical-align: middle;"><b>Performance</b></td> <td> <input type="checkbox"/> The school has a highly developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements  <input checked="" type="checkbox"/> (3)The school has a well-developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements  <input type="checkbox"/> The school has a partially developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements  <input type="checkbox"/> The school has a minimal or no system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements           </td> </tr> </table>	<b>Rubric</b>		<b>Performance</b>	<input type="checkbox"/> The school has a highly developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input checked="" type="checkbox"/> (3)The school has a well-developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input type="checkbox"/> The school has a partially developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input type="checkbox"/> The school has a minimal or no system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements	<input checked="" type="checkbox"/> Evidence of staff evaluation system (B3.4f) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
<b>Rubric</b>					
<b>Performance</b>	<input type="checkbox"/> The school has a highly developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input checked="" type="checkbox"/> (3)The school has a well-developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input type="checkbox"/> The school has a partially developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input type="checkbox"/> The school has a minimal or no system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements				



**O12: CLEARANCES AND CREDENTIALING COMPLIANCE - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #12**

*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
- The school has obtained all necessary employee clearances, including criminal background and tuberculosis (TB) risk assessments/clearances, prior to employment, and keeps all clearances current
- The school has obtained all necessary vendor clearances, including criminal background and tuberculosis (TB) risk assessments/clearances, prior to the provision of service, and keeps all clearances current
- The school has conducted volunteer clearances in accordance with applicable law and policy, including criminal background clearances for all volunteers who perform schoolsite services while not under the direct supervision of a school employee, and tuberculosis (TB) risk assessments/clearances for all volunteers with frequent or prolonged contact with students

	Rubric	Sources of Evidence
<b>Performance</b>	<input type="checkbox"/> The school has fully implemented and continually monitors systems and procedures that maintain 100% compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements at all times <input checked="" type="checkbox"/> (3)The school has implemented and monitors systems and procedures that maintain substantial compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements <input type="checkbox"/> The school has partially implemented and intermittently monitors systems and procedures to maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements <input type="checkbox"/> The school has not implemented and/or does not monitor systems and procedures to maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements	<input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2018-2019</i> form (“ESSA Grid”) <b>(B3A.1a)</b> <input checked="" type="checkbox"/> Staff rosters and school master schedule <b>(B3A.1 b and c)</b> <input checked="" type="checkbox"/> Custodian(s) of Records documentation <b>(B3A.1d)</b> <input checked="" type="checkbox"/> Criminal Background Clearance Certifications <b>(B3A.2)</b> <input checked="" type="checkbox"/> Teaching credential/authorization documentation <b>(B3A.2a)</b> <input checked="" type="checkbox"/> Vendor certifications <b>(B3A.5)</b> <input type="checkbox"/> Volunteer (TB) risk assessment/clearance certification <b>(B3A.6)</b> <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)

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

N/A





2458	2015-16					2016-17					2017-18				
	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
<b>Matrix for Success Academy</b>															
Cash and Cash Equivalents		0	0	0	0		0	0	0	0		0	0	0	0
Current Assets		0	0	0	0		0	0	0	0		0	0	0	0
Fixed and Other Assets		0	0	0	0		0	0	0	0		0	0	0	0
<b>Total Assets</b>		0	0	0	0		0	0	0	0		0	0	0	0
Deferred Outflow		0	0	0	0		0	0	0	0		0	0	0	0
Current Liabilities		0	0	0	0		0	0	0	0		0	0	0	0
Long Term Liabilities		0	0	0	0		0	0	0	0		0	0	0	0
<b>Total Liabilities</b>		0	0	0	0		0	0	0	0		0	0	0	0
Unfunded OPEB Liabilities/Deferred Inflow		0	0	0	0		0	0	0	0		0	0	0	0
<b>Net Assets</b>		0	0	0	0		0	0	0	0		0	0	0	0
Total Revenues	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Expenditures	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Net Income / (Loss)</b>		0	0	0	0		0	0	0	0		0	0	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
<b>Inc / (Dec) in Net Assets</b>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Net Assets, Beginning</b>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Adj. for restatement / Prior Yr Adj	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Net Assets, Beginning, Adjusted</b>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Net Assets, End</b>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

2458	Audited Financials					2018-19				
	2014-15	2015-16	2016-17	2017-18	2018-19	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
<b>Matrix for Success Academy</b>										
Cash and Cash Equivalents	0	0	0	0	0		0	80,117	0	0
Current Assets	0	0	0	0	0		0	217,368	0	0
Fixed and Other Assets	0	0	0	0	0		0	19,486	0	0
<b>Total Assets</b>	0	0	0	0	0		0	236,854	0	0
Deferred Outflow	0	0	0	0	0		0	0	0	0
Current Liabilities	0	0	0	0	0		0	844,902	0	0
Other Long Term Liabilities	0	0	0	0	0		0	0	0	0
Unfunded OPEB Liabilities/Deferred Inflow	0	0	0	0	0		0	0	0	0
<b>Total Liabilities</b>	0	0	0	0	0		0	844,902	0	0
<b>Net Assets</b>	0	0	0	0	0		(106,310)	(608,048)	0	0
Total Revenues	0	0	0	0	0	2,481,846	1,461,617	832,128	0	0
Total Expenditures	0	0	0	0	0	2,412,187	1,765,510	1,637,760	0	0
<b>Net Income / (Loss)</b>	0	0	0	0	0	69,659	(303,893)	(805,632)	0	0
Operating Transfers In (Out) and Sources / Uses	0	0	0	0	0	0	0	0	0	0
Extraordinary Item - Transfer of Net Assets	0	0	0	0	0	0	0	0	0	0
<b>Inc / (Dec) in Net Assets</b>	0	0	0	0	0	69,659	(303,893)	(805,632)	0	0
<b>Net Assets, Beginning</b>	0	0	0	0	0	0	197,584	197,584	0	0
Adj. for restatement / Prior Yr Adj	0	0	0	0	0	0	0	0	0	0
<b>Net Assets, Beginning, Adjusted</b>	0	0	0	0	0	0	197,584	197,584	0	0
<b>Net Assets, End</b>	0	0	0	0	0	69,659	(106,309)	(608,048)	0	0



FISCAL OPERATIONS	RATING
<p>You have been assessed by the Fiscal Oversight team and you are receiving the rating of 1, Unsatisfactory.</p> <p><b>Other circumstances and information could influence the rating and are noted in this evaluation.</b></p>	1
<p>MATRIX opened in August 2018 and currently serves students in grades 9-12. A student count visit was conducted on September 11, 2018, which revealed that the school had an enrollment of 16 students, which was below the projected enrollment referenced in the three-year budget submitted with the school’s charter petition. Based on the CSD’s observation that the school’s enrollment was significantly below its projected enrollment, the CSD requested a revised three-year budget from the school.</p> <p>MATRIX’s fiscal condition is unsatisfactory. The school is in its first year of operation and the school’s Second Interim projects negative net assets of <b>(\$608,048)</b> and a net loss of <b>(\$805,632)</b>. See additional information in the Areas Noted for Further Growth and/or Improvement section below.</p> <p>PazLo Education Foundation operates two schools, namely, Academic Performance Excellence Academy (APEX), and Matrix for Success Academy. Both PazLo Education Foundation schools are authorized by the Los Angeles Unified School District and both are overseen by the same governing board. The CSD was advised that neither of the schools pay management fees. The costs for some staff positions (e.g., Directors, Testing and Data Managers, the IT and Special Programs Assistant, the Human Resources/Operations Manager, etc.) are allocated based upon the amount of work they perform at each school, and the allocation percentages between the two schools may vary. Some costs (e.g., fees related to the schools’ back office services provider firm, CharterSAFE general insurance, audits, and general legal services) are shared/allocated on a pro-rated basis and calculated based on the Average Daily Attendance (ADA) for each of the two PazLo Education Foundation schools. As such, the allocation percentages may vary from year to year, depending on the ADA for each PazLo Education Foundation school.</p>	
<p><b>Areas of Demonstrated Strength and/or Progress:</b></p> <p>No significant items noted.</p>	



**Areas Noted for Further Growth and/or Improvement:**

**1. Adverse Financial Condition (Low Student Enrollment and Projected Negative Year-End Fund Balance):**

2018-2019 is MATRIX’s first year of operation. The 2017-2018 independent audit report on file with the CSD reflected start-up funds of \$422,063 [consisting of \$97,063 from the Public Charter Schools Grant Program (PCSGP) and a \$325,000 grant from the Walton Foundation]. The school reported total expenses of \$224,480 prior to its first year of operation. According to the 2017-2018 independent audit report, the school had positive net assets of \$197,583 and net income of \$197,583. The 2018-2019 Second Interim projects negative net assets of (\$608,048) and a net loss of (\$805,632). The school primarily attributes its projected year-end operating loss and cash flow challenges to its low student enrollment, particularly during the school’s First Principal (P-1) attendance reporting period, which, in this instance, would include the school’s attendance data from its August 2018 opening through December 31, 2018.

The CSD was informed that, as of April 19, 2019, MATRIX had enrollment of 145 students. The school’s enrollment projections for the five years of its charter term (beginning with Fiscal Year 2018-2019), project 200 students for 2018-2019, and 400, 550, 570 and 600 students for the four fiscal years that follow (as per MATRIX’s petition budget submitted to LAUSD during the school’s new charter petition process in June 2017). Additionally, based on the “Grade Level Summary” report generated by MATRIX from its Student Information System (SIS) (for the eight months spanning from August 20, 2018 through April 19, 2019), its percentage of apportionment was calculated at 79.19%. MATRIX confirmed that the formulas used to calculate the school’s apportionment percentage are consistent with the California Department of Education’s (CDE) ADA calculations.

Per MATRIX and its revised budget/cash flow projections (work-in-progress) submitted to the CSD in May 2019 (i.e., the school’s May 2019 revised budget), the school projected a 2018-2019 year-end operating loss of (\$776,074), with a positive cash balance of \$59K and an outstanding loan balance of \$200K (drawn from a Line of Credit with Hanmi Bank). The CSD was further advised that, as of April 30, 2019, the school’s interagency loan balance owed to APEX was \$259K. With respect to the enrollment issue described above, MATRIX declared that one significant contributing factor to its projected operating loss was its inability to move forward with its original school facility of choice (the New Hope Baptist site), because the school could not legally open without a “traditional” school certificate of occupancy. MATRIX further explained: “Given the independent study nature of such programs, no traditional facilities are necessary...The New Hope Baptist site had been previously occupied by two non-classroom based schools for over a decade...without any issue, and it made sense for us to occupy as well, until we were informed [by LAUSD] that a “traditional” school certificate of occupancy (COO) was necessary to open operations.” MATRIX asserted that, due to the traditional school COO requirement, the school involuntarily postponed its opening (from July 1, 2018 to August 20, 2018), while remaining contractually liable for \$52K in facilities costs owed on the New Hope Baptist site through December 31, 2018. MATRIX also informed the CSD that, in July 2018, the school was able to secure its current facility (the St. Patrick site), with an existing traditional COO. The CSD was further advised that, while the school was later successful in opening at a different location (the St. Patrick site), the facilities costs at the St. Patrick site were approximately 60% higher than the costs negotiated at its original site of choice (the New Hope Baptist site). The school asserted that this change caused MATRIX to lose ADA revenues of approximately \$200K - \$300K. MATRIX stated that the school was prepared to commence its operations with 125 students at the New Hope Baptist site.



In response to the CSD’s inquiries regarding the actions taken or to be taken by PazLo Education Foundation’s governing board in addressing the school’s enrolment issues, MATRIX stated that its governing board “has been informed and updated regarding the enrollment issues since the school opened in the Fall of 2018. Budget cuts to the MATRIX administration were identified in September [2018] and implemented in [the] 1<sup>st</sup> week of October [2018]. Additional staff cuts were identified in November [2018] and implemented in the Spring of 2019.” Per MATRIX’s Co-Executive Director and MATRIX’s back office services provider firm (ExED), by June 30, 2019, additional budget cuts will be considered, including reductions in amounts paid for school staff and expenses (e.g., textbooks, student materials, non-capitalized equipment, other supplies, instructional consultants, housekeeping expenses, etc.).

MATRIX’s April 29, 2019 email to the CSD asserted: “The [PazLo Education Foundation, Inc.] Governing Board has approved, and considered multiple avenues to solve the ongoing cash-flow challenges stemming from the projected net loss during 2018-19. [The PazLo Education Foundation, Inc.] Governing Board will continue to monitor and implement fundraising efforts and seek other avenues in order to ensure operation of Matrix for Success Academy. Additionally, the Governing Board will not open any other MATRIX resource centers during the 2019-20 school year, but rather focus on stabilizing the current [M]atrix site in South Los Angeles.”

With regard to MATRIX’s recruiting/marketing efforts, MATRIX indicated: “Directors and counselors at MATRIX have distributed thousands of flyers within a 5 mile radius of the MATRIX resource center.” According to MATRIX, every LAUSD high school and charter high school within a 5-mile radius of MATRIX has been visited and informed of the educational option that MATRIX provides to the community. MATRIX stated that its staff members have also visited and collaborated with several other agencies active throughout the surrounding community (including the Los Angeles County Probation Department, Los Angeles Gang Reduction and Youth Development, A Place Called Home, Los Angeles Police Department Newton Division, and others) as MATRIX builds awareness for its program and further establishes its presence in the community. Moreover, MATRIX declared that its recruiting/marketing efforts resulted in its enrollment growth from January 2019 through April 2019 (with a corresponding and steady enrollment growth from 74 students, to 101, to 141, to 146 during this period, according to the enrollment data provided by MATRIX).

In addition to the recruiting efforts described above, MATRIX stated in its April 29, 2019 email that, in collaboration with local schools’ counseling staff, MATRIX has recruited and built a waiting list of 135 students from local schools (Jefferson HS, Santee HS, Diego Rivera HS, Maya Angelou HS, Annenberg HS, Synergy HS, etc.) and students who are credit deficient. MATRIX declared that, based on the current trends with returning student enrollment, it expects 200 students on July 1, 2019 (before accounting for the waiting list students referenced above).

With regard to other sources of funding that may be utilized to mitigate the school’s cash flow issues, MATRIX’s April 29, 2019 email identified the following financing sources: (1) The existing \$500K line of credit with Hanmi Bank (secured over a year ago by PazLo Education Foundation, Inc. for its two charter schools); (2) A \$250K Charter School Revolving Loan that MATRIX has applied for with the California School Finance Authority’s (CSFA), and (3) \$50K in Operational Grants that PazLo Education Foundation has applied for with the Joseph Drown Foundation. Additionally, per the CSD’s review of the November 27, 2018 PazLo Education Foundation, Inc. governing board resolution and its approved meeting minutes, an interagency loan from APEX to MATRIX (with a maximum of \$300,000) was approved. The November 27, 2018 resolution indicated: “Any additional loans beyond the \$300,000 will require board approval.”



Moreover, the CSD was advised that MATRIX has launched a PazLo Fundraising Campaign “through a combination of private events, [GoFundMe] campaign, and targeted grant opportunities.” Furthermore, MATRIX indicated potential “fee for service” revenues that may be generated in the future from PazLo’s own proprietary “competency-based education/learning system (DPNG) and platform which has been implemented in a ‘Beta’ form during 2018-19.”

Finally, per ExED’s May 16, 2019 email to the CSD [and the CDE’s approval letter within the email], on May 14, 2019, the CDE has approved MATRIX’s PCSGP Higher Grant Award budget Proposal of \$100K, which the school expects to receive in approximately August 2019. Per the CSD’s review of documents published on the CDE’s website, the California State Board of Education agenda and draft minutes for March 13-14, 2019 (specifically, Item 10) listed its recommendation and approval of MATRIX’s 100% of funding determination for the 2018-2019 and 2019-2020 school years.

The CSD was advised that MATRIX would finalize its 2019-2020 budget/cash flows for the discussion and approval at the next PazLo Education Foundation, Inc. governing board meeting, which is currently scheduled for June 11, 2019.

The governing board and leadership team of the charter school are responsible for managing the operations of the school. Thus, the school’s action plans concerning the above-noted findings and observations should be discussed at MATRIX’s next board meeting, but, in any event, no later than 90 days following the school’s receipt of this report. After the school’s next board meeting, it is the school’s responsibility to provide the CSD with its approved board meeting minutes regarding its action plans/steps, and/or proof of implementation of the mitigating actions taken by the school. The CSD will continue to monitor these issues through oversight.

**Other Observations (Items described in this section, while not addressed in the charter school’s Fiscal Policies and Procedures, are recommended for improvement to align with optimal business practices).**

**1. Check Reviews (Missing Dual Signatures):**

Based on the CSD’s review of the school’s check register for the period spanning from March 2018 through February 2019, a sample of 13 transactions were selected for further review. The CSD noted one item with a check amount over \$10K that lacked a second signature (Check #500045, in the amount of \$12,707.54, dated 8/21/2018 and made payable to KCD Technologies). The copy of the canceled check provided to the CSD showed only the signature from MATRIX’s Co-Director.

Page 5 of MATRIX’s fiscal policies and procedures states: “The Director and Board Treasurer will co-approve checks in excess of \$10,000 for all non-recurring items. All checks less than \$10,000 require only the signature of the School Director. All checks greater than \$10,000 require two approving signatures.”

In response to the CSD’s observation above, the school’s ExED representative provided the following: “This was an ExED oversight when stamping checks.” The CSD recommends that MATRIX and its back office services provider firm strictly adhere to its governing board-approved fiscal policies and procedures concerning the reviews and approvals of checks for requiring two signatures and the governing board Treasurer approval for checks of \$10K or more.



**2. Purchase Approvals:**

Based on the CSD’s review of sample checks and SpendBridge documentation, the CSD noted one item that was approved by the Administrative Assistant (who does not have the approving role per MATRIX’s fiscal policies and procedures). Specifically, the Administrative Assistant approved Check #500042, in the amount of \$331.94, dated 8/8/2018 and made payable to MATRIX’s Co-Director.

Page 2 of MATRIX’s fiscal policies and procedures states: “The Director(s) and/or Principal must approve all purchases.”

In response to the CSD’s observation above, the school’s ExED representative attributed the aforementioned error to the approval workflow issues that became evident after the child account for MATRIX and new rules were created. MATRIX’s ExED representative asserted: “Without the proper workflow rule being fully implemented yet, the invoices were getting marked as ‘approved’ upon being entered. During the regular A[ccounts] P[ayable] payment processing, a couple of these invoices were pulled through into our accounting software and ultimately got paid, before the analyst knew and the workflows were fixed. Unfortunately, check #500042 was one of those.” This approval error appears to an isolated incident.

**3. Late Payments:**

Based on the CSD’s review of a sample of checks and supporting documentation, the CSD noted two vendor payments that were issued late, which can cause the school to incur late fees. Details regarding these late payments are summarized below.

Item #	Check #	Payment Date	Vendor	Check Amount	CSD's Comments
1	500004	6/1/2018	KQ Management, Inc.	\$4,570.00	The due date for this invoice was 5/7/2018. However, the school did not issue payment until 6/1/2018.
2	500060	9/21/2018	ID Ville	\$3,323.30	The due date for this invoice was 8/29/2018. However, the school did issue payment until 9/21/2018.
			<b>Total</b>	<b>\$8,073.30</b>	

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

The Charter Schools Division will continue to monitor these issues referenced in the “Other Observations” section of this report. The results may be factored into the school’s rating for next year.



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Matrix for Success Academy

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 4/4/2019

**Corrective Action Required:**

None noted that require immediate action to remedy concerns noted in this report. As explained above, MATRIX is in the process of finalizing its 2019-2020 budget/cash flows for the discussion and approval at the next PazLo Education Foundation, Inc. governing board meeting, which is currently scheduled for June 11, 2019. The CSD will continue to monitor the school's student enrollment trend and its budget/cash flows through ongoing oversight, and will initiate tiered intervention actions as appropriate.



**Notes:**

1. Reviewed independent audit report for the fiscal year ended June 30, 2018 and noted the following:
  - a. Audit opinion: Unmodified
  - b. Material weaknesses: None Reported
  - c. Deficiencies/Findings: None Reported
2. Reviewed bank statements and bank reconciliations from September 2018 through February 2019. Selected the months of September 2018 through February 2019 for sample testing. No discrepancies were noted.
  - a. Hanmi Bank Checking Account Ending in X4854 (Operating Account)
3. Reviewed the following 13 checks. The CSD’s observations were noted in the Other Observations section above.
  - a. Check numbers 500004, 500029, 500031, 500035, 500040, 500042, 500045, 500046, 500049, 500060, 500084, 500106, and 500131.
4. Per the 2017-2018 audit report, the school’s cash and cash equivalents is \$152,126, and total expenditures equal \$224,480. Therefore, the school’s cash reserve level is 67.77%, which exceeds the recommended 5%.
5. A copy of the charter school’s organizational chart, which depicts the current reporting structure of the charter school, including but not limited to, any board member or school employee with responsibilities outlined within the charter school’s financial policies and procedures was provided.
6. A Segregation of Duties review was conducted at MATRIX. No discrepancies were noted.
7. MATRIX did not disclose any legal actions, regulatory proceedings, or investigations which might have a material impact on their financial viability.
8. Governing board meeting minutes reflecting the presentation of financial reports, such as balance sheets, income statements, and cash flow statements were provided.
9. Governing board meeting minutes reflecting the adoption of the 2018-2019 budget were provided.
10. Governing board meeting minutes reflecting the receipt, review, and approval of interim financial reports submitted to LAUSD were provided.
11. Governing board meeting minutes reflecting the selection of the current independent auditor were provided.
12. Governing board meeting minutes reflecting the approval of the current fiscal policies and procedures were provided.
13. Governing board meeting minutes reflecting the discussion of the most current independent audit report were provided.
14. Evidence of MATRIX offering STRS, PERS, and/or Social Security benefits to its employees and proof of payment was provided.
15. Equipment inventory was provided.
16. The 2018-2019 LCAP was submitted to LAUSD.
17. The EPA allocation and expenditures are not posted on MATRIX’s website because the school is in its first year of operation and EPA expenditures cannot yet be determined.

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

N/A





**Fiscal Operations Rubrics**

*Existing School* – a charter school that has at least one annual independent audit on file with the Charter Schools Division [Possible Rating 1-4]

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

<p><i>An existing school that meets all of the required criteria and four of the Supplemental Criteria listed below would be assessed eligible to be considered as Accomplished.</i></p>	<p><i>An existing school that meets all of the required criteria and three of the Supplemental Criteria listed below would be assessed eligible to be considered as Proficient.</i></p>
<p><b><u>Existing Schools (based on the most current annual audit):</u></b> An existing school is one that has at least one annual independent audit on file with the Charter Schools Division</p> <p style="text-align: center;"><b><u>REQUIRED CRITERIA</u></b></p> <ol style="list-style-type: none"> <li>1. Net Assets are positive in the prior two audits;</li> <li>2. The two most current audits show no material weaknesses, deficiencies and/or findings;</li> <li>3. All vendors and staff are paid in a timely manner;</li> <li>4. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term;</li> <li>5. Charter school adheres to the governing board approved Fiscal Policies and Procedures;</li> <li>6. Governing board adopts the annual budget;</li> <li>7. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD;</li> <li>8. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD;</li> <li>9. There is no apparent conflict of interest;</li> <li>10. The EPA allocation and expenditures are posted on the charter school’s website;</li> <li>11. The LCAP is submitted to the appropriate agencies;</li> <li>12. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals;</li> <li>13. Requests for information made by the Charter Schools Division and LAUSD are processed by the charter school in a timely manner; and</li> <li>14. Audited and unaudited actuals nearly mirror each other; and</li> </ol>	<p><b><u>Existing Schools (based on the most current annual audit):</u></b> An existing school is one that has at least one annual independent audit on file with the Charter Schools Division</p> <p style="text-align: center;"><b><u>REQUIRED CRITERIA</u></b></p> <ol style="list-style-type: none"> <li>1. Net Assets are positive in the most current audit;</li> <li>2. The most current audit shows no material weaknesses, deficiencies and/or findings;</li> <li>3. Vendors and staff are paid in a timely manner;</li> <li>4. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term;</li> <li>5. Charter school generally adheres to the governing board approved Fiscal Policies and Procedures;</li> <li>6. Governing board adopts the annual budget;</li> <li>7. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD;</li> <li>8. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD;</li> <li>9. There is no apparent conflict of interest;</li> <li>10. The EPA allocation and expenditures are posted on the charter school’s website;</li> <li>11. The LCAP is submitted to the appropriate agencies;</li> <li>12. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals;</li> <li>13. Requests for information made by the Charter Schools Division and LAUSD are processed by the charter school in a timely manner;</li> <li>14. There are no significant recurring issues; and</li> </ol>



<p><b><i>An existing school that meets all of the required criteria and four of the Supplemental Criteria listed below would be assessed eligible to be considered as Accomplished.</i></b></p>	<p><b><i>An existing school that meets all of the required criteria and three of the Supplemental Criteria listed below would be assessed eligible to be considered as Proficient.</i></b></p>
<p>15. There are no discrepancies cited in the Areas Noted for Further Growth and/or Improvement</p>	<p>15. Audited and unaudited actuals nearly mirror each other.</p>
<p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>	<p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>
<p style="text-align: center;"><b><u>SUPPLEMENTAL CRITERIA</u></b></p>	<p style="text-align: center;"><b><u>SUPPLEMENTAL CRITERIA</u></b></p>
<ol style="list-style-type: none"> <li>1. Positive Net Assets exceed 4% of prior year expenditures;</li> <li>2. The cash balance at the beginning of the school year is at least 5% of the prior year expenses;</li> <li>3. A comprehensive website that provides at a minimum six of the following fiscal items:             <ul style="list-style-type: none"> <li>○ Most current financial reports presented to the governing board</li> <li>○ Employee handbook</li> <li>○ Student handbook</li> <li>○ Salary schedules/benefits/information</li> <li>○ Budget development process</li> <li>○ Governing board member information (e.g., name, contact information, position on the governing board, term expiration) and meeting dates, time, and location</li> <li>○ The most current approved petition</li> <li>○ Administration/school contact</li> <li>○ School calendar</li> <li>○ Enrollment policies and procedures</li> <li>○ Fiscal policies and procedures manual</li> </ul> </li> <li>4. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract;</li> <li>5. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting; and</li> <li>6. Governing board approved LCAP is posted on the charter school’s website.</li> </ol>	<ol style="list-style-type: none"> <li>1. Positive Net Assets exceed 3% of prior year expenditures;</li> <li>2. The cash balance at the beginning of the school year is at least 4% of the prior year expenses;</li> <li>3. A comprehensive website that provides at a minimum six of the following fiscal items:             <ul style="list-style-type: none"> <li>○ Most current financial reports presented to the governing board</li> <li>○ Employee handbook</li> <li>○ Student handbook</li> <li>○ Salaries schedule/benefits/information</li> <li>○ Budget development process</li> <li>○ Governing board member information (e.g., name, contact information, position on the governing board, term expiration) and meeting dates, time, and location</li> <li>○ The most current approved petition</li> <li>○ Administration/school contact</li> <li>○ School calendar</li> <li>○ Enrollment policies and procedures</li> <li>○ Fiscal policies and procedures manual</li> </ul> </li> <li>4. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract;</li> <li>5. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting; and</li> <li>6. Governing board approved LCAP is posted on the charter school’s website.</li> </ol>
<p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>	<p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>



<p><i>An existing school that meets all of the Required criteria and six of the supplemental criteria listed below would be assessed eligible to be considered as Developing.</i></p>	<p><i>An existing school would be assessed as Unsatisfactory based on the statements below:</i></p>
<p><b><u>Existing Schools (based on the most current audit):</u></b>          An existing school is one that has at least one annual independent audit on file with the Charter Schools Division</p> <p style="text-align: center;"><b><u>REQUIRED CRITERIA</u></b></p> <ol style="list-style-type: none"> <li>1. Net Assets are positive, or net assets are negative with strong trend toward positive (be positive at the end of the third year, per applicable audit, and beyond);</li> <li>2. Vendors and staff are paid in a timely manner;</li> <li>3. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term;</li> <li>4. Governing board adopts the annual budget;</li> <li>5. The EPA allocation and expenditures are posted on the charter school’s website;</li> <li>6. The LCAP is submitted to the appropriate agencies;</li> <li>7. Have an audit conducted annually by an independent auditing firm; and</li> <li>8. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD.</li> </ol> <p><b><u>Note:</u></b> Other circumstances and information could influence the rating and will be noted in the evaluation.</p> <p style="text-align: center;"><b><u>SUPPLEMENTAL CRITERIA</u></b></p> <ol style="list-style-type: none"> <li>1. The cash balance at the beginning of the school year is positive;</li> <li>2. Enrollment is stable or changing at a manageable rate (Enrollment changes are reflected in annual budget and facilities);</li> <li>3. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract;</li> <li>4. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting;</li> </ol>	<p><b><u>Existing Schools (based on the most current audit):</u></b>          An existing school is one that has at least one annual independent audit on file with the Charter Schools Division</p> <p>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, but failed to provide a satisfactory response. Continued operation of a charter school that is assessed as Unsatisfactory may result to non-implementation of instructional programs as provided in the petition. The charter school also has shown no immediate source of revenue to maintain a viable budget, nor has provided a feasible financial plan to mitigate the negative fiscal condition. The charter school’s governing board members lack fiscal capacity.</p>



*An existing school that meets all of the Required criteria and six of the supplemental criteria listed below would be assessed eligible to be considered as Developing.*

- 5. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD;
- 6. **Current** audit shows no material weaknesses, deficiencies and/or findings;
- 7. Charter school adheres to the governing board approved Fiscal Policies and Procedures;
- 8. There is no apparent conflict of interest;
- 9. Governing board approves any amendment(s) to the charter school’s budget; and
- 10. Governing board approved LCAP is posted on the charter school’s website.

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

*An existing school would be assessed as Unsatisfactory based on the statements below:*

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



<p><b><i>A new school that meets all of the Required criteria listed below would be assessed eligible to be considered as Developing.</i></b></p>	<p><b><i>A new school would be assessed as Unsatisfactory based on the statements below:</i></b></p>
<p><b><u>New Schools:</u></b></p> <p style="text-align: center;"><b><u>REQUIRED CRITERIA</u></b></p> <ol style="list-style-type: none"> <li>1. A new school is one that does not have an independent audit on file with the Charter Schools Division.</li> <li>2. If enrollment is below the funding survey, the charter school has made significant adjustments in their operations to allow for the reduced income, and submitted a revised three-year budget and three-year cash flow statement.</li> <li>3. Projected debt 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.</li> <li>4. Interim reports and unaudited actuals project:             <ol style="list-style-type: none"> <li>a. Positive net assets</li> <li>b. Expenses less than revenues</li> <li>c. Projected expenses and revenues have no significant variance from budget</li> </ol> </li> <li>5. As a practice, the governing board receives and reviews the charter school’s financial reports as evidenced by the governing board meeting minutes.</li> <li>6. The LCAP is submitted to the appropriate agencies.</li> <li>7. The EPA allocation and expenditures are posted on the charter school’s website, if applicable.</li> </ol> <p><u>Note:</u> A new school is one that does not have an independent audit on file with the Charter Schools Division. New schools are evaluated based on current year information. New schools receive a rating of 1 or 2.</p> <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>	<p><b><u>New Schools:</u></b></p> <p>A charter school is assessed as Unsatisfactory if the charter school does not meet the criteria for Developing. A charter school was given a certain period of time to address the fiscal concerns of LAUSD, but failed to provide satisfactory response. Continued operation of a charter school that is assessed as Unsatisfactory may result to non-implementation of instructional programs as provided in the petition. The charter school also has shown no immediate source of revenue to maintain a viable budget, nor has provided a feasible financial plan to mitigate the negative fiscal condition. The charter school’s governing board members lack fiscal capacity.</p> <p><u>Note:</u> A new school is one that does not have an independent audit on file with the Charter Schools Division. New schools are evaluated based on current year information. New schools receive a rating of 1 or 2.</p> <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>