



LOS ANGELES UNIFIED SCHOOL DISTRICT

CHARTER SCHOOLS DIVISION

ANNUAL PERFORMANCE-BASED OVERSIGHT VISIT REPORT* **2022-2023 SCHOOL YEAR** **FOR**

MATRIX FOR SUCCESS ACADEMY - 2458

Name and Location Code of Charter School

LAUSD Vision

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

CSD Mission

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

CSD Core Values

We believe that our success depends on:

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

* Charter School shall comply in a timely manner with all applicable federal and state laws and regulations, as they may change from time to time, including but not limited to matters related to the school's governance, programs, facilities, operations, and/or fiscal management. Elements of the oversight process may be modified as LAUSD continues to respond to the COVID-19 pandemic. To support the well-being of all at a school site, all are expected to follow applicable COVID-19 public health guidelines, including related District requirements for operations at District facilities. The assigned CSD Administrator will provide any updated information reach out with more details, as needed.



Charter School Name:	Matrix for Success Academy (Matrix)			Location Code:	2458
Current Address:	City:	ZIP Code:	Phone:	Fax:	
1010 E. 34th St.	Los Angeles	90011	(323) 897-5971	(504) 817-6550	
Current Term of Charter¹:	LAUSD Board District:		LAUSD Region:		
July 1, 2018 to June 30, 2025	5		East		
Number of Students Currently Enrolled:	Enrollment Capacity Per Charter:	Number Above/Below Enrollment Capacity (day of visit):		-364	
236	600				
Grades Currently Served:	Grades To Be Served Per Charter:	Percent Above/Below Enrollment Capacity (day of visit):		-60.67%	
9-12	9-12				
Norm Enrollment Number:	181				
Total Number of Staff Members:	15	Certificated:	9	Classified:	6
Charter School's Leadership Team Members:	Margaret Woelke - Executive Director, Cesar Lopez - Executive Director, Richelle Brooks - Principal				
Charter School's Contact for Special Education:	Loren Slack - SPED Coordinator	SELPA & Option:		3	
CSD Assigned Administrator:	Brenda Martinez	CSD Fiscal Services Manager:		Dolores Mabini	
Other School/CSD Team Members:	Jose Rodriguez, Lourdes Ramirez				
Oversight Visit Date(s):	May 18, 2023		Fiscal Review Date (if different):	NA	
Is school located on a District facility? If so, please indicate the applicable program (e.g. Prop 39, PSC, conversion, etc.):	No		LAUSD Co-Location Campus(es) (if applicable):	NA	
Certificate of Occupancy (COO) or Temporary Certificate of Occupancy Type: (if a TCO, please note expiration date)	COO		COO/TCO Approved Grade Levels and Occupancy Loads:	Occupancy - 280	

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, Proficient	No Rating	3, Proficient	3, Proficient

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



CHARTER RENEWAL CRITERIA

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

REPORT GUIDE

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

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

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

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

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

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

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



GOVERNANCE	RATING*
Summary of School Performance	3, Proficient
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p>G2: BROWN ACT: The Governing Board complies with most material provisions of the Brown Act. Some evidence from the documents provided, as well as website review included the following:</p> <ul style="list-style-type: none"> • Governing Board holds regular meetings and agendas and minutes can be found on website. • Board meeting dates for this academic school year are as follows: July 26, 2022, October 4, 2022, December 13, 2022, January 24, 2023, February 28, 2023, March 28, 2023, April 25, 2023, May 23, 2023, and June 20, 2023. • Current Governing bylaws • Current roster of Governing Board members • Board minutes and agendas are evident • Calendar of regular meetings of Governing Board • Evidence of Brown Act training • Topics covered at Board meetings included: Enrollment and attendance, ADA update, LAUSD Oversight Visit, Graduation Rate, and Employee Retention. <p>G3: DUE PROCESS: The Governing Board has systems in place to ensure that the school provides adequate due process, in accordance with applicable law, the charter, and LAUSD charter policy, for students, employees, parents, and the public. Some evidence from the documents provided, as well as website review included the following:</p> <ul style="list-style-type: none"> • Uniform Complaint Procedures policy and form • Complaint Procedures • Family Handbook found on the School’s website includes: <ul style="list-style-type: none"> ○ Attendance ○ Uniform Complaint Procedures ○ Suspensions ○ School Schedules ○ High School Graduation Requirements ○ Dress Code • Employee Handbook includes <ul style="list-style-type: none"> ○ Conditions of Employment ○ Employee Wages and Health Benefits ○ Discipline and Termination of Employment ○ Uniform Complaint Procedure <p><u>Areas Noted for Further Growth and/or Improvement</u></p> <p>None</p>	



Corrective Action Required

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

Notes:

None

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



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

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

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

	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The Governing Board has fully implemented the organizational structure set forth in approved charter, including evidence of seeking input from all committees/councils, and a well-developed system for the evaluation of the school’s executive level leadership <input checked="" type="checkbox"/> The Governing Board has fully implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and a system for the evaluation of the school’s executive level leadership <input type="checkbox"/> The Governing Board has partially implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and a system for the evaluation of the school’s executive level leadership <input type="checkbox"/> The Governing Board has not implemented the organizational structure set forth in approved charter, nor any mandated committees/councils or a system for the evaluation of the school’s executive level leadership	<input checked="" type="checkbox"/> Current organizational chart (B1.1a) <input checked="" type="checkbox"/> Organizational chart in Board approved charter (B1.1b) <input checked="" type="checkbox"/> Bylaws (B1.2) <input checked="" type="checkbox"/> Board member roster (B1.3) <input checked="" type="checkbox"/> Board meeting agendas and minutes (B1.4) <input checked="" type="checkbox"/> Observation of Governing Board meeting(s) <input checked="" type="checkbox"/> Committee/council calendars, agendas, roster(s), and sign-ins (B1.6) <input checked="" type="checkbox"/> Documentation related to system for evaluation of executive level leadership. (B1.7) <input checked="" type="checkbox"/> Discussion with leadership <input type="checkbox"/> Other: (Specify)



G2: BROWN ACT - QUALITY INDICATOR #2

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

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

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



G3: DUE PROCESS - QUALITY INDICATOR #3

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

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

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



G4: RESPONSIVE AND ACCOUNTABLE GOVERNANCE - QUALITY INDICATOR #4

<i>The Governing Board has systems in place to ensure ongoing:</i>	
<ul style="list-style-type: none"> • Review and use of academic performance data (e.g., CA School Dashboard, internal assessments, etc.) and other school data and information to ensure sound Governing Board decision-making in support of continuous improvement of student achievement, fiscal viability, compliance, and overall public school excellence • Monitoring of the school’s implementation of its Local Control and Accountability Plan (LCAP) and additional school plans, (e.g., Comprehensive Support and Improvement (CSI), Additional Targeted Support and Improvement (ATSI), School Plan for Student Achievement (SPSA), and action plans for making progress toward LCAP goals) • Transparent governance and accountability to stakeholders, including consideration of input from the school’s committees/councils and stakeholders • Monitoring of staffing needs and the school’s compliance with all applicable credentialing, clearance, and training requirements 	
Rubric	Sources of Evidence



Performance	<input type="checkbox"/> The Governing Board regularly considers school performance data, stakeholder input, and other data to inform decision-making (e.g., approving action plans, resources, evaluation criteria) <input checked="" type="checkbox"/> The Governing Board considers school performance data, stakeholder input, and other data to inform decision-making (e.g., approving action plans, resources, evaluation criteria, etc.) <input type="checkbox"/> The Governing Board inconsistently considers school performance data, stakeholder input, and other data to inform decision-making (e.g., approving action plans, resources, evaluation criteria, etc.) <input type="checkbox"/> The Governing Board seldom considers school performance data, stakeholder input, and other data to inform decision-making (e.g., approving action plans, resources, evaluation criteria, etc.)	<input checked="" type="checkbox"/> Board meeting agendas, minutes, and meeting materials for meetings at which the Board reviewed: (B1.14a) <input checked="" type="checkbox"/> CA School Dashboard Academic Performance Indicators (ELA, MATH, ELPI, CCI) <input checked="" type="checkbox"/> CA School Dashboard Academic Engagement Indicators (Chronic Absenteeism, Graduation Rate) <input checked="" type="checkbox"/> CA School Dashboard Conditions and Climate Indicator (Suspension Rate) <input checked="" type="checkbox"/> Attendance rate <input checked="" type="checkbox"/> Internal assessment data <input checked="" type="checkbox"/> Enrollment data <input checked="" type="checkbox"/> Staffing data (retention, turnover, certification, etc.) <input checked="" type="checkbox"/> Board meeting calendar (B1.5) <input checked="" type="checkbox"/> Human Resources (HR) policies and procedures (B1.13) <input checked="" type="checkbox"/> Other evidence of a system for Board review and analysis of internal school data to inform decision-making (B1.14b) <input checked="" type="checkbox"/> Documentation of Board member and/or executive leadership training on topics that support responsive and accountable governance (e.g., data-driven decision making, Board roles and responsibilities, etc.) (B1.14c) <input checked="" type="checkbox"/> Observation of Governing Board meeting(s) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Stakeholder focus group <input type="checkbox"/> Other: (Specify)
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G5: FISCAL CONDITION - GOVERNANCE QUALITY INDICATOR #5

The Governing Board has a system in place to ensure fiscal viability:

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

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



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

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

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

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The school consistently adheres to the Governing Board approved fiscal policies and procedures, does not have any areas noted for improvement, and the two most current annual independent audits show no material weaknesses, deficiencies, and/or findings <input checked="" type="checkbox"/> The school generally adheres to the Governing Board approved fiscal policies and procedures, but has areas noted for improvement, and the most current annual independent audit shows no material weaknesses, deficiencies, and/or findings <input type="checkbox"/> The school is not adhering to the Governing Board approved fiscal policies and procedures, and has areas noted for improvement, or has significant fiscal-related issues (e.g., fiscal mismanagement, audit findings, unresolved recurring issues, potential conflicts of interest, etc.) <input type="checkbox"/> The school is continuously not adhering to the Governing Board approved fiscal policies and procedures, or has significant and recurring fiscal-related issues (e.g., fiscal mismanagement, audit findings, potential conflicts of interest, etc.)	<input checked="" type="checkbox"/> Board meeting agendas and minutes (B1.4) <input type="checkbox"/> Other evidence of a system for Board review and monitoring of fiscal policies, procedures, budget, and finances (B1.15) <input type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with leadership <input checked="" type="checkbox"/> Independent audit report(s) <input checked="" type="checkbox"/> Other: (see Fiscal Operations section below)

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

None



STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE	RATING*
Summary of School Performance	No Rating
2020 California Department of Education’s (CDE) Charter School’s Performance Category	***
<p>Does the charter school qualify for technical assistance? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>Is the charter school a state-identified school under the Every Student Succeeds Act (ESSA)? <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>If yes, what is the school’s identification? (See additional information within “Notes” section below)</p> <p><input checked="" type="checkbox"/> Comprehensive Support and Improvement (CSI)</p> <p><input type="checkbox"/> Additional Targeted Support and Improvement (ATSI)</p>	
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p>A6: DASHBOARD SCHOOLWIDE SUSPENSION RATE INDICATOR</p> <ul style="list-style-type: none"> The schoolwide Dashboard Suspension Rate Indicator Status is “Very Low” at 0.0% of students suspended at least once in the 2021-2022 school year, which is lower than the State at 3.1%. <p><u>Areas Noted for Further Growth and/or Improvement</u></p> <p>A7: DASHBOARD SCHOOLWIDE GRADUATION RATE INDICATOR</p> <ul style="list-style-type: none"> The schoolwide Dashboard Graduation Rate Indicator Status is “Very Low” at 29.9% of students graduated in the 2021-2022 school year, which is lower than the State at 87.4%. <p>Per School leadership the following was stated and/or will be implemented:</p> <ul style="list-style-type: none"> Hiring of our Postsecondary/College and Career Counselor which works with students to identify their strengths, interests, and goals, and assists them in crafting academic and post-secondary plans aligned with their aspirations The school implements individualized learning plans, tutoring services, and providing access to online learning tools School will implement programs and initiatives to foster a positive school culture and promote student engagement The school will develop and implement a comprehensive career and college readiness program that exposes students to various post-secondary opportunities and helps them build the necessary skills for success College and career counseling, organizing college visits, and partnering with local businesses to provide internship and job shadowing opportunities The school will enhance their system for identifying and supporting at-risk students by implementing data-driven strategies and regularly monitoring student progress Early warning indicators, such as attendance and academic performance, will be used to identify students in need of additional support Actively involve parents and community stakeholders in efforts to improve graduation rates by fostering open communication and creating opportunities for their participation in school decision-making 	

Corrective Action Required

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

Notes:

***This category receives “No Rating” because Matrix for Success Academy is an alternative school participating in the Dashboard Alternative School Status (DASS) program. A DASS school does not qualify for the High, Middle, or Low performance categories and are not assigned a status level for ELA and Math. As a DASS school, LAUSD’s Charter Schools Division and Matrix for Success Academy are in the process of identifying alternative metrics to be considered for renewal, in addition to the charter school’s performance on the state and local indicators, pursuant to Education Code 47607(c)(7).

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

The following is Matrix Academy’s Plan for improving student performance in the areas of Math and English Language Arts:

- The school will identify the needs of each student group and provide targeted support to address their specific challenges
- They will offer English language development classes for English Learners
- Provide extra tutoring and academic support for Students with Disabilities
- Offer after-school programs and enrichment opportunities for students who are socioeconomically disadvantaged
- The school will provide students with the necessary technology and internet access to participate in online learning and to help with completion of assignments
- The school will focus on creating a school environment that is safe, supportive, and inclusive for all students
- They will work closely with parents and community members to engage them in their child's education
- The school will provide regular communication and updates to families, hosting parent workshops, and involving community members in school events and activities
- The school strives to create a supportive and inclusive environment that encourages consistent attendance, emphasizes the importance of test days, and provides necessary resources to help students overcome the barriers they face

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

- ELPAC results,
- Smarter Balanced ELA/Literacy Score
 - Level 3 (Standard Nearly Met) or 4 (Standard Met) or
- NWEA-MAP Reading score



- 50th percentile or above for all grade levels, all testing seasons or
- NWEA-MAP Reading minimum RIT score
- teacher evaluation
- parent input

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

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

Graduation Criteria (high schools only):

- Students Must Earn a minimum of 210 credits, complete service learning and present their annual developmental portfolio in order to receive a diploma. Students must achieve a grade of a "C" or better in order to obtain credit for the courses.
- Full A-G High School (HS) Diploma – 210 Credits
- Over 18 HS Diploma – 170
- Foster Youth (AB216) & CA HS Diploma – 130
- HS Equivalency and 10 Courses HS Diploma – 50

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



A1: DASHBOARD SCHOOLWIDE ELA INDICATOR - QUALITY INDICATOR #1

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> California School Dashboard Schoolwide ELA data (CDE) 		
Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The schoolwide Dashboard ELA Indicator Status is Very High <input type="checkbox"/> The schoolwide Dashboard ELA Indicator Status is High; or Medium and at/above statewide Distance From Standard (“DFS”) <input type="checkbox"/> The schoolwide Dashboard ELA Indicator Status is Medium and below statewide DFS; or Low <input type="checkbox"/> The schoolwide Dashboard ELA Indicator Status is Very Low <input checked="" type="checkbox"/> Not Available - No Status assigned for the ELA Indicator on the Dashboard	<input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> LAUSD Office of Data & Accountability’s Data Set (B2.1) <input type="checkbox"/> Other: (Specify)

A2: DASHBOARD SCHOOLWIDE MATH INDICATOR - QUALITY INDICATOR #2

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> California School Dashboard Schoolwide Math data (CDE) 		
Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The schoolwide Dashboard Math Indicator Status is Very High <input type="checkbox"/> The schoolwide Dashboard Math Indicator Status is High; or Medium and at/above statewide DFS <input type="checkbox"/> The schoolwide Dashboard Math Indicator Status is Medium and below statewide DFS; or Low <input type="checkbox"/> The schoolwide Dashboard Math Indicator Status is Very Low <input checked="" type="checkbox"/> Not Available - No Status assigned for the Math Indicator on the Dashboard	<input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> LAUSD Office of Data & Accountability’s Data Set (B2.1) <input type="checkbox"/> Other: (Specify)



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

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

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

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> California School Dashboard Schoolwide CCI data (CDE) 		
Rubric		Sources of Evidence
Performance	<input checked="" type="checkbox"/> Not Available - No Status assigned for the CCI on the 2022 Dashboard <input type="checkbox"/> Not Applicable - CCI is not applicable for the grade levels assigned at the charter school	<input type="checkbox"/> California School Dashboard Report (CDE) <input type="checkbox"/> LAUSD Office of Data & Accountability's Data Set (B2.1) <input type="checkbox"/> Other: (Specify)



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

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

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

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

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

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

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

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



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

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

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

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator Status is Very High <input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator Status is High; or Medium and at/above statewide percentage <input type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator Status is Medium and below statewide percentage; or Low <input checked="" type="checkbox"/> The schoolwide Dashboard Graduation Rate Indicator Status is Very Low <input type="checkbox"/> Not Available - No Status assigned for the Graduation Rate Indicator on the Dashboard <input type="checkbox"/> Not Applicable - The Graduation Rate Indicator is not applicable for the grade levels assigned at the charter school	<input checked="" type="checkbox"/> California School Dashboard Report (CDE) <input checked="" type="checkbox"/> LAUSD Office of Data & Accountability’s Data Set (B2.1) <input checked="" type="checkbox"/> Parent-Student Handbook or other documentation of school’s graduation requirements (B2.5) <input type="checkbox"/> Other: (Specify)

A8: DASHBOARD STUDENT GROUP ELA - QUALITY INDICATOR #8

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

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

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



A9: DASHBOARD STUDENT GROUP MATH - QUALITY INDICATOR #9

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

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

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

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

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

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

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



A11: ENGLISH LEARNER RECLASSIFICATION - QUALITY INDICATOR #11

<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"> English Learner reclassification rate for 2021-2022 (CDE) 	
Rubric	Sources of Evidence
<p>Performance</p> <ul style="list-style-type: none"> <input type="checkbox"/> The school reclassified English Learners at a rate higher than the state average <input type="checkbox"/> The school reclassified English Learners at a rate similar to the state average <input type="checkbox"/> The school reclassified English Learners at a rate lower than the state average <input type="checkbox"/> The school did not reclassify any of its English Learners <input type="checkbox"/> Not Applicable - The school did not have any English Learners <input checked="" type="checkbox"/> No Reclassification data for the 2021-2022 school year published by the state at the time of the issuance of this report. Please see “Notes” section above. 	<ul style="list-style-type: none"> <input type="checkbox"/> Reclassification report (CDE) <input type="checkbox"/> Office of Data & Accountability’s Data Set (B2.1) <input type="checkbox"/> Summative ELPAC report (CDE) (B2.3) <input type="checkbox"/> Master Plan for English Learners adopted by school’s Governing Board (B3.2i)

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

<p>The information provided in this report on internal assessments is to determine the charter school’s verified data implementation, as applicable. As part of renewal (once and as applicable) for charter schools that are identified by the California Department of Education (CDE) as Middle or Low Performing, the LAUSD Board shall consider schoolwide performance and performance of all student groups on the California School Dashboard and shall also consider clear and convincing evidence, demonstrated by verified data, showing either a) the school achieved measurable increases in academic achievement, as defined by at least one year’s progress for each in school or b) strong postsecondary outcomes equal to similar peers.</p>			
<p>The LAUSD Board shall only consider verified data adopted by the State Board of Education pursuant to Education Code section 47607.2(c) (<u>Approved List</u>). In addition, staff’s review of the charter school’s submitted materials will be based on the verified data sources and related information adopted by the State Board of Education (Ed. Code, § 47607.2(c)(3).) Charter schools submitting verified data for this purpose must adhere to the state-approved criteria.</p>			
<p>The information below is based on charter school’s self-reported data and will not be scored.</p>			
<p>Academic Progress Indicator(s) for the 2021-2022 School Year:</p>			
Academic Progress Indicator: CAASPP (ELA)	Grade Levels: 11 th Choose an item.	Assessment Administration: Spring	95% Participation Met*: <input type="checkbox"/> Met <input checked="" type="checkbox"/> Not Met
Academic Progress Indicator: CAASPP (Math)	Grade Levels: 11 th	Assessment Administration: Spring	95% Participation Met*: <input type="checkbox"/> Met <input checked="" type="checkbox"/> Not Met
Academic Progress Indicator: Star Assessments by Renaissance (Reading)	Grade Levels: 9 th – 12 th	Assessment Administration: Fall/Spring	95% Participation Met*: <input type="checkbox"/> Met <input checked="" type="checkbox"/> Not Met
<p>*If the charter school did not meet the 95% participation, the charter school’s plan to address the participation is included in the Notes below.</p>			



1. The charter school disaggregated student performance data for the following student groups: Click or tap here to enter text.
 The charter school did not disaggregate student performance data by student groups.
2. The charter school affirmed that the assessments were administrated as intended, consistent with the test publishers' administration and test security procedures.
3. The charter school provided the test publisher's definition of one year's progress, per publisher's source document.

Postsecondary Outcomes (high school only):

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

Notes:

95% Participation Plan:

The school is planning to increase participation rates through the increase of student engagement. They also aim to host community building events every month to encourage students to attend in-person learning and administer Matrix' mandatory tests.

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

None



LOCAL CONTROL ACCOUNTABILITY PLAN 2022-2023 (For Informational Purposes Only)

The CSD reviewed the Local Control Accountability Plan.

All requested template information and descriptions were provided:	Sources of Evidence
<ul style="list-style-type: none"> <input checked="" type="checkbox"/> LCFF Budget Overview for Parents <input checked="" type="checkbox"/> Supplement to the Annual Update to the 2021-2022 LCAP <input checked="" type="checkbox"/> 2022-2023 Plan Summary <input checked="" type="checkbox"/> Engaging Educational Partners <input checked="" type="checkbox"/> Goals and Actions <input checked="" type="checkbox"/> Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students <input checked="" type="checkbox"/> Action Tables 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Local Control Accountability Plan (B2.7) <input checked="" type="checkbox"/> Board Agenda and Minutes (B2.7)

Notes:

None



ORGANIZATIONAL MANAGEMENT, PROGRAMS, AND OPERATIONS	RATING*
Summary of School Performance	3, Proficient
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p>O1: SCHOOL HEALTH AND SAFETY PLANS AND PROCEDURES: The school has a system in place to ensure protection of student and staff health and safety in compliance with applicable legal and charter requirements related to health and safety. Some evidence from the documents provided, as well as interviews with school staff and leadership included the following:</p> <ul style="list-style-type: none"> • A visitor’s policy • Integrated Safety School Plan • Certificate of Occupancy • Student ID with National Suicide Prevention Lifeline • Student immunization records and they are housed on the school’s platform • School has policy for suicide prevention <p>O2: HEALTH AND SAFETY TRAINING AND PREPARATION: The school has a system in place to ensure required health and safety training for the protection of students and staff is completed and in compliance with applicable legal and charter school requirements related to health and safety. Some evidence from the documents provided, observation, as well as interviews with school staff and leadership included the following:</p> <ul style="list-style-type: none"> • Trainings for Mandated Child Abuse, Bloodborne and Suicide Prevention completed • EpiPen administration training of volunteers documented, August 5, 2023, for 18 staff • Emergency Drills plus training and sign in of staff members <ul style="list-style-type: none"> ○ July 14, 2022, Fire, Earthquake, Take Cover, Lockdown ○ August 25, 2022, Earthquake ○ September 29, 2022, Earthquake ○ October 18, 2022, Fire, Great California Shakeout ○ November 17, 2022, Earthquake, Lockdown/ Shelter in Place ○ December 15, 2022, Earthquake, Take Cover and Drop ○ January 26, 2023, Fire, Earthquake, Take Cover, Lockdown ○ February 23, 2023, Earthquake ○ March 30, 2023, Earthquake, Fire ○ April 27, 2023, Earthquake, Lockdown ○ May 11, 2023, Earthquake ○ June 8, 2023, Earthquake 	



O5: SPECIAL EDUCATION: The school has a system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements.

- At the time of the visit, review of Welligent reports revealed the following:
 - Welligent 200 report revealed that there was 1 IEP overdue
 - Welligent 300 report revealed 13 records were in tier 4, 5 record were in tier 5, 3 records were in tier 6; school provided rationale for reasons services are not fully met which included student attendance as well as other factors that qualify the school as DASS that impact service delivery

Some evidence from the documents provided, observation, as well as interviews with school staff and leadership included the following:

- DVR was completed in the 2020-2021 school year
- Self-Review Checklist
- Special Education Professional Development calendar for 2022-2023
 - Service Minute Tracking
 - Non-Engaged Student Protocols
 - Compliance
 - STAR Testing

Areas Noted for Further Growth and/or Improvement

O4: MEETING THE NEEDS OF ALL STUDENTS; STUDENT GROUP DATA ANALYSIS: The school has partially implemented the components of the charter's instructional program designed to meet the learning needs of all students, including its student groups, and partially modifies instruction based on data analysis.

- Dashboard Graduation Rate Indicator Status is “Very Low” for the two numerically significant student groups, Latino, and Socioeconomically Disadvantaged; both numerically significant student groups have a lower graduation percentage than the State’s average percentage

In light of these results, and to support improved academic achievement, the school has shared interventions and supports as noted in the Student Achievement and Educational Performance section of this report.

Corrective Action Required

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

Notes:

None



***NOTE:**

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

O1: SCHOOL HEALTH AND SAFETY PLANS AND PROCEDURES - QUALITY INDICATOR #1

The school has implemented school health and safety plans and procedures that ensure:

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

Rubric	Sources of Evidence
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Performance	<input type="checkbox"/> The school has a well-developed system in place to ensure the protection of student and staff health and safety in compliance with applicable legal and charter requirements related to health and safety <input checked="" type="checkbox"/> The school has a system in place to ensure protection of student and staff health and safety in compliance with applicable legal and charter requirements related to health and safety <input type="checkbox"/> The school has a partially developed system in place to ensure protection of student and staff health and safety in compliance with applicable legal and charter requirements related to health and safety <input type="checkbox"/> The school has a minimal or no system in place to ensure protection of student and staff health and safety in compliance with applicable legal and charter requirements related to health and safety	<input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10a) <input checked="" type="checkbox"/> Visitor’s Policy (B3.1a) <input checked="" type="checkbox"/> Certificate(s) of Occupancy or equivalent (B3.1b) <input checked="" type="checkbox"/> Student immunization (B3.1h) <input checked="" type="checkbox"/> Health screening (B3.1h) <input checked="" type="checkbox"/> Comprehensive Health, Safety, and Emergency Plan (B3.1c) <input checked="" type="checkbox"/> Evacuation route maps (B3.1c) <input checked="" type="checkbox"/> Student ID card printed with the National Suicide Prevention Lifeline phone number (B3.1k) <input checked="" type="checkbox"/> Board adopted policy on pupil suicide prevention (grades K-6) (B3.1f) <input checked="" type="checkbox"/> Board adopted policy on pupil suicide prevention (grades 7-12) (B3.1f) <input checked="" type="checkbox"/> Site/classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
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O2: HEALTH AND SAFETY TRAINING AND PREPARATION – QUALITY INDICATOR #2

The school has a system in place to ensure:

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

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



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

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

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

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



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

The school has a system in place to ensure:

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

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



O5: SPECIAL EDUCATION - QUALITY INDICATOR #5

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

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

	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The school has a well-developed system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements <input checked="" type="checkbox"/> The school has a system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements <input type="checkbox"/> The school has a partially developed system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements <input type="checkbox"/> The school has a minimal or no system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements <input type="checkbox"/> Not Applicable - Charter school participates in LAUSD's Option 1 SELPA <input type="checkbox"/> Charter school does not participate in LAUSD's SELPA	<input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10a) <input checked="" type="checkbox"/> District Validation Review (DVR) (B3.3a) <input checked="" type="checkbox"/> Self-Review Checklist (B3.3a) <input checked="" type="checkbox"/> Welligent reports and/or other documentation, including from the Division of Special Education (B3.3a) <input checked="" type="checkbox"/> Professional development documentation (B3.3a and B3.3c) <input checked="" type="checkbox"/> Intervention and support for students with disabilities (B3.2j) <input checked="" type="checkbox"/> Consultation with Charter Operated Programs office <input checked="" type="checkbox"/> Other special education documentation (B3.3a) <input checked="" type="checkbox"/> Classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



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

<p><i>The school has a school climate and schoolwide student discipline system in place to ensure that the school's practices:</i></p> <ul style="list-style-type: none"> Align with principles of the District's Discipline Foundation Policy and School Climate Bill of Rights Resolution, including but not limited to, tiered behavior intervention, alternatives to suspension, and schoolwide positive behavior support, data monitoring and, includes a discipline system complaint process Provide positive opportunities for student wellness, growth and success, aimed at making the school safe, welcoming, supportive and inclusive Minimize discretionary suspensions and expulsions Reduce or eliminate suspension disproportionality for student groups Minimize chronic absenteeism for all students and student groups Procedures for preventing acts of bullying, including cyberbullying, in accordance with the requirements of Ed. Code, § 32283.5 and 234.4 		
	Rubric	Sources of Evidence
Performance	<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"/> The school has a school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights <input type="checkbox"/> The school has a partially developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights <input type="checkbox"/> The school has a minimally developed or no school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights	<input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10a) <input checked="" type="checkbox"/> LCAP (B3.2b) <input checked="" type="checkbox"/> Professional development documentation (B3.3c) <input checked="" type="checkbox"/> Implementation of school climate and student discipline system that aligns with Discipline Foundation Policy and School Climate Bill of Rights principles (B3.3b) <input checked="" type="checkbox"/> Implementation of tiered behavior intervention (e.g. SSPT) (B3.3b) <input checked="" type="checkbox"/> Implementation of alternatives to suspension (B3.3b) <input checked="" type="checkbox"/> Implementation of schoolwide positive behavior support system (B3.3b) <input checked="" type="checkbox"/> Implementation of procedures for preventing acts of bullying, including cyberbullying (B3.3b) <input checked="" type="checkbox"/> Data monitoring (B3.3b) <input checked="" type="checkbox"/> LAUSD Office of Data & Accountability's Data Sets for suspension, expulsion, disproportionality, and chronic absenteeism (B2.1) <input checked="" type="checkbox"/> Classroom/site observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Stakeholder focus group <input type="checkbox"/> Other: (Specify)



O7: PROFESSIONAL DEVELOPMENT - QUALITY INDICATOR #7

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



O8: STAKEHOLDER ENGAGEMENT AND INVOLVEMENT - QUALITY INDICATOR #8

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

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

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



O9: TRANSPARENCY FOR STAKEHOLDERS- QUALITY INDICATOR #9

<p><i>The school has a system in place to ensure that it operates in a transparent manner and keeps stakeholders informed, including:</i></p> <ul style="list-style-type: none"> • Information is easily accessible to the public and school stakeholders, including but not limited to applicable categories described in Charter School Transparency Resolution • UCP and all complaint procedures • Title IX information is available in applicable languages as required by law • Per Ed. Code § 234.6 and District policy, specified information relating to suicide, bullying, discrimination and harassment prevention, among other things, are readily accessible in a prominent location on the school website in a manner that is easily accessible to parents/guardians and students • Provides all stakeholders with appropriate, accessible, and relevant information about individual student and schoolwide academic progress and performance • Notification requirements to pupils and parents or guardians of pupils on how to initiate access to available pupil mental health services on campus, in the community, or both no less than twice during the school year, in accordance with Ed. Code, § 49428 • Identifies and implements the most appropriate methods of informing parents and guardians of pupils in grades 6-12 of human trafficking prevention resources, in accordance with Ed. Code, § 49381 • Informs parents of high school students about transferability of courses to other public high schools and the eligibility of courses to meet college entrance requirements, in accordance with Ed. Code, § 47605 (high schools only) 	
Rubric	Sources of Evidence



Performance

- The school has a well-developed system to share information with stakeholders, that is easily accessible via its documents available both manually, electronically and on its website
- The school has a system to share information with stakeholders via its documents available both manually, electronically and on its website
- The school has a partially developed system to share information with stakeholders via its documents available manually/electronically or on its website
- The school has a minimally developed system to share information with stakeholders with limited to no availability of documents manually/electronically or on its website

- UCP Procedure and Forms (B1.11)
- Complaint Procedure and Forms (B1.12)
- Review of the following information posted to the school’s website (B3.3e):
 - LCAP, per Ed. Code § 47606.5(h)
 - Current Board agenda in compliance with Brown Act, per Gov. Code, §54954.2(a)(1)
- Website posting required per Ed. Code § 234.6 (B3.3e):
 - Policy on Pupil Suicide Prevention
 - Title IX information, including a link to CDE’s Title IX website
 - Policies on anti-discrimination, anti-harassment, anti-intimidation, anti-bullying, and sexual harassment policies, including:
 - Anti-cyberbullying procedures
 - Social media anti-bullying procedures
 - Link to statewide resources including community based organizations compiled by CDE
- Sharing accessible and relevant information about individual student, student group, and schoolwide academic progress and performance with all stakeholders as appropriate (B3.3e)
- Access to approved charter (B3.3e)
- Compliance with the LAUSD BOE’s Charter School Transparency Resolution, including (B3.3e):
 - Financial Audit
 - Student Demographics
- Documentation of informing parents/guardians about transferability of courses/course credit and eligibility to meet A-G requirements (high schools only) (B3.3e)
- Informing parents/guardians of human trafficking prevention resources (grades 6-12) (B3.3e)
- Notification of access to available mental health services (B3.3e)
- School website (B3.3e)



	<input type="checkbox"/> Other: (Specify)
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O10: EVALUATION OF SCHOOL STAFF - QUALITY INDICATOR #10

<p><i>The school has a system in place for the evaluation of school staff designed to ensure that the school’s educational program yields high student achievement and complies with all applicable legal requirements, including:</i></p> <ul style="list-style-type: none"> Evaluation procedures with clear performance standards for all school-based staff, including but not limited to administrators, certificated staff, and classified staff Evaluation tool(s) for all school-based staff, including but not limited to administrators, certificated staff, and classified staff 			
Rubric	Sources of Evidence		
Performance	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%; padding: 5px;"> <input type="checkbox"/> The school has a well-developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input checked="" type="checkbox"/> The school has a system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input type="checkbox"/> The school has a partially developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input type="checkbox"/> The school has a minimal or no system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements </td> <td style="width: 40%; padding: 5px;"> <input checked="" type="checkbox"/> Evaluation procedures with clear performance standards for all school-based staff (B3.3f) <input checked="" type="checkbox"/> Evaluation tool(s) for all school-based staff (B3.3f) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify) </td> </tr> </table>	<input type="checkbox"/> The school has a well-developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input checked="" type="checkbox"/> The school has a system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input type="checkbox"/> The school has a partially developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input type="checkbox"/> The school has a minimal or no system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements	<input checked="" type="checkbox"/> Evaluation procedures with clear performance standards for all school-based staff (B3.3f) <input checked="" type="checkbox"/> Evaluation tool(s) for all school-based staff (B3.3f) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
<input type="checkbox"/> The school has a well-developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input checked="" type="checkbox"/> The school has a system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input type="checkbox"/> The school has a partially developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input type="checkbox"/> The school has a minimal or no system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements	<input checked="" type="checkbox"/> Evaluation procedures with clear performance standards for all school-based staff (B3.3f) <input checked="" type="checkbox"/> Evaluation tool(s) for all school-based staff (B3.3f) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)		



O11: CLEARANCES AND CREDENTIALING COMPLIANCE - QUALITY INDICATOR #11

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

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

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

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

None



2458	2019-2020					2020-2021					2021-2022				
	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
Matrix for Success Academy															
Cash and Cash Equivalents		63,428	8,674	160,910	160,911		36,851	50,281	242,959	242,959		226,973	356,567	463,111	463,112
Current Assets		601,562	612,355	555,769	570,768		552,746	594,675	507,054	492,054		497,714	601,127	837,533	822,531
Fixed and Other Assets		15,722	15,722	24,889	24,888		18,123	18,122	18,123	33,123		11,356	11,357	11,356	26,357
Total Assets		617,284	628,078	580,658	595,656		570,869	612,797	525,177	525,177		509,070	612,484	848,889	848,888
Deferred Outflows of Resources		0	0	0	0		0	0	0	0		0	0	0	0
Current Liabilities		950,885	895,042	613,769	565,167		555,047	534,851	330,273	310,691		293,285	295,724	390,010	429,543
Other Long Term Liabilities		13,862	(5,552)	260,511	312,434		260,511	260,511	30,418	50,000		(19,582)	30,418	39,534	0
Unfunded OPEB Liabilities		0	0	0	0		0	0	0	0		0	0	0	0
Total Liabilities		964,747	889,490	874,280	877,601		815,558	795,362	360,691	360,691		273,703	326,142	429,544	429,543
Deferred Inflows of Resources		0	0	0	0		0	0	0	0		0	0	0	0
Net Assets		(347,463)	(261,412)	(293,622)	(281,945)		(244,689)	(182,565)	164,486	164,486		235,367	286,342	419,345	419,345
Total Revenues	2,668,800	2,534,443	2,466,967	2,247,884	2,247,883	2,304,407	2,065,942	2,105,327	2,269,876	2,352,120	2,365,344	2,398,891	2,368,133	2,356,849	2,435,448
Total Expenditures	2,330,821	2,371,944	2,218,417	2,031,544	2,019,866	2,259,180	2,028,688	2,005,946	1,823,445	1,905,689	2,112,624	2,328,010	2,246,277	2,101,990	2,180,589
Net Income / (Loss)	337,979	162,499	248,549	216,340	228,017	45,227	37,254	99,381	446,431	446,431	252,720	70,881	121,856	254,859	254,859
Operating Transfers In (Out) and Sources / Uses	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Extraordinary Item - Transfer of Net Assets	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Inc / (Dec) in Net Assets	337,979	162,499	248,549	216,340	228,017	45,227	37,254	99,381	446,431	446,431	252,720	70,881	121,856	254,859	254,859
Net Assets, Beginning	(608,048)	(509,962)	(509,962)	(509,962)	(509,962)	(261,412)	(293,622)	(293,623)	(293,623)	(281,945)	(182,565)	164,486	164,486	164,486	164,486
Adj. for restatement / Prior Yr Adj	16,740	0	0	0	0	(91,684)	11,679	11,677	11,678	0	273,829	0	0	0	0
Net Assets, Beginning, Adjusted	(591,308)	(509,962)	(509,962)	(509,962)	(509,962)	(353,096)	(281,943)	(281,946)	(281,945)	(281,945)	91,264	164,486	164,486	164,486	164,486
Net Assets, End	(253,329)	(347,463)	(261,412)	(293,622)	(281,945)	(307,869)	(244,689)	(182,565)	164,486	164,486	343,984	235,367	286,342	419,345	419,345
Unrestricted Net Assets		(363,185)	(277,135)	(318,511)	(281,945)		(262,812)	(200,688)	164,486	164,486		235,367	286,342	419,345	419,345
Restricted Net Assets		15,722	15,722	24,889	0		18,123	18,123	0	0		0	0	0	0

2458	Audited Financials					2022-2023				
	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Matrix for Success Academy										
Cash and Cash Equivalents	5,210	160,911	242,959	463,112	0		391,055	507,618	0	0
Current Assets	272,765	570,768	492,054	822,531	0		834,058	858,723	0	0
Fixed and Other Assets	20,510	24,888	33,123	26,357	0		8,740	8,157	0	0
Total Assets	293,275	595,656	525,177	848,888	0		842,798	866,880	0	0
Deferred Outflows of Resources	0	0	0	0	0		0	0	0	0
Current Liabilities	803,237	565,167	310,691	429,543	0		365,446	356,545	0	0
Other Long Term Liabilities	0	312,434	50,000	0	0		39,534	39,534	0	0
Unfunded OPEB Liabilities	0	0	0	0	0		0	0	0	0
Total Liabilities	803,237	877,601	360,691	429,543	0		404,980	396,079	0	0
Deferred Inflows of Resources	0	0	0	0	0		0	0	0	0
Net Assets	(509,962)	(281,945)	164,486	419,345	0		437,818	470,802	0	0
Total Revenues	935,064	2,247,883	2,352,120	2,435,448	0	2,811,567	2,623,490	2,705,461	0	0
Total Expenditures	1,642,609	2,019,866	1,905,689	2,180,589	0	2,503,269	2,605,017	2,654,004	0	0
Net Income / (Loss)	(707,545)	228,017	446,431	254,859	0	308,298	18,473	51,457	0	0
Operating Transfers In (Out) and Sources / Uses	0	0	0	0	0	0	0	0	0	0
Extraordinary Item - Transfer of Net Assets	0	0	0	0	0	0	0	0	0	0
Inc / (Dec) in Net Assets	(707,545)	228,017	446,431	254,859	0	308,298	18,473	51,457	0	0
Net Assets, Beginning	197,583	(509,962)	(281,945)	164,486	0	286,342	419,345	419,345	0	0
Adj. for restatement / Prior Yr Adj	0	0	0	0	0	211,357	0	0	0	0
Net Assets, Beginning, Adjusted	197,583	(509,962)	(281,945)	164,486	0	497,699	419,345	419,345	0	0
Net Assets, End	(509,962)	(281,945)	164,486	419,345	0	805,997	437,818	470,802	0	0
Unrestricted Net Assets	(509,962)	(281,945)	164,486	419,345	0		429,078	470,802	0	0
Restricted Net Assets	0	0	0	0	0		8,740	0	0	0



FISCAL OPERATIONS

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

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

Matrix for Success Academy’s (Matrix) fiscal condition is positive for the 2021-2022 fiscal year. According to the 2021-2022 independent audit report, the school had positive net assets of \$419,345 and net income of \$254,859. The 2022-2023 Second Interim projected positive net assets of \$470,802 and net income of \$51,457.

According to PazLo Education Foundation’s (PazLo) independent audit report dated June 30, 2022, Matrix is one of two schools (Academic Performance Excellence Academy [APEX], and Matrix) operated by PazLo, both of which are currently authorized by the Los Angeles Unified School District (LAUSD). PazLo and its charter schools reported positive net assets of \$2,529,339 and net income of \$507,199. PazLo, without its charter schools, reported \$0 net assets and net income/loss. The CSD was advised that neither of the PazLo charter schools pays 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 on need assessments for the individual schools for the school year and the allocation percentages between the two schools may vary. Some costs (e.g., fees related to the schools’ back-office services provider firm, Excellence for Education (ExED), 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 charter schools.

Financial Highlights

Matrix for Success Academy	FINANCIAL HIGHLIGHTS				
	2018-2019 (Audited Actuals)	2019-2020 (Audited Actuals)	2020-2021 (Audited Actuals)	2021-2022 (Audited Actuals)	2022-2023 (Second Interim)
Net Assets	(\$509,962)*	(\$281,945)*	\$164,486	\$419,345	\$470,802
Net Income / (Loss)	(\$707,545)**	\$228,017	\$446,431	\$254,859	\$51,457
Transfers In / Out	\$0	\$0	\$0	\$0	\$0
Prior Year Adjustment(s)	\$0	\$0	\$0	\$0	\$0
Cash and Cash Equivalents	\$5,210	\$160,911	\$242,959	\$463,112	\$507,618
Unrestricted Net Assets	(\$509,962)	(\$281,945)	\$164,486	\$419,345	\$470,802



Norm Enrollment Reported by the School	15	183	192	169	181
FINANCIAL RATIO ANALYSIS					
Cash Reserve Level (Cash Balance/Total Expenditures) <i>5% and greater is recommended</i>	0.32%	7.97%	12.75%	21.24%	19.13%
Fund Reserve (Reserve for Economic Uncertainty) (Unrestricted Net Assets/Total Expenditures) <i>3% - 5% and greater is recommended (depending on the school's ADA)</i>	0.00%	0.00%	8.63%	19.23%	17.74%
Current Ratio (Working Capital Ratio) (Current Assets/Current Liabilities) <i>At least 1.2 or 120% is recommended</i>	33.96%	100.99%	158.37%	191.49%	240.85%
Debt Ratio (Total Liabilities/Total Assets) <i>Lower than 1.0 or 100% is recommended</i>	273.89%	147.33%	68.68%	50.60%	45.69%

*/**The school primarily attributes its operating loss reported in Fiscal Year 2018-2019 and its negative assets in its first two years of operation to its low student enrollment. See further details under **Item #1 under the Other Observations section** below.

Areas of Demonstrated Strength and/or Progress:

1. The school’s fiscal condition has turned positive since Fiscal Year 2020-2021, despite its significant under-enrollment (yet growing enrollment) when comparing the school’s reported Norm Enrollment data with its projected student enrollment per the school’s enrollment roll-out plan in its operative charter (see **Item #1 under Other Observations** for further details below). Please refer to the Financial Highlights table above.

Areas Noted for Further Growth and/or Improvement:

Through conducting fiscal oversight and analyzing the data below, the CSD requests and receives fiscal documents from PazLo (including bank statements, bank reconciliations, credit card statements, and check registers) for the two PazLo charter schools that are currently authorized by LAUSD. The CSD reviews these financial documents and a sampling of checks across these PazLo charter schools, to assess overall compliance with *APEX Academy/Matrix for Success Academy’s Fiscal Policies and Procedures Handbook*. Any areas noted as other observations below relating to PazLo and its charter schools’ overall compliance to the aforementioned policies and procedures handbook are indicated within each charter school’s Annual Performance-Based Oversight Visit Report, which may or may not have been experienced by the specific PazLo school named above. Lastly, any exceptions that are school-specific, such as the fiscal condition, are reviewed separately for each PazLo charter school.

1. Late Payments to Vendors (Recurring)/Late Fees:

Based on the CSD’s review of the two LAUSD-authorized PazLo charter schools’ check register for the period spanning from December 1, 2021, through



December 31, 2022, a sample of 30 checks and 9 bank transactions were selected for further review. The CSD noted 4 of the 30 vendor payments that were issued late and/or referenced late fees based on the invoices furnished to the CSD. Details regarding these vendor payments are summarized below. Late payments were cited in the CSD’s prior-year Annual Performance-Based Oversight Visit Reports at least for Fiscal Years 2019-2020, 2020-2021, and 2021-2022.

Item #	ACH/ Check #	Check Issuance Date	Invoice Due Date	Payee	Check Amount	Transaction Description	PazLo Education Foundation’s Response
1	A006873	7/18/2022	5/31/2022	Revolution Foods Inc.	\$9,689.60	04/22 - Food Service Program	Going up for bid in June 2023.
2	P028402	10/12/2022	9/30/22	Athens Services	\$12.37	Late Fee	All invoices were not arriving at the school site or arriving late. [The school spoke to a representative for Athens and [the invoices] are now received by email.
3	P030576	11/9/2022	10/31/2022	Athens Services	\$12.16	Late Fee	
4	A009348	11/18/2022	10/01/2022 11/01/2022 12/01/2022	St. Patrick Church, Los Angeles	\$45,000.00	Rent Payment for: October 2022 - \$15,000.00 November 2022 - \$15,000.00 December 2022 - \$15,000.00	This was [a back-office service provider’s] oversight. The [back-office provider] will initiate rent payments on the 15th of each month and checks will be mailed no later than the 20th of each month.

Page 7 of *APEX Academy/Matrix for Success Academy’s Fiscal Policies and Procedures Handbook (Winter 2023)* stipulates: “Vendor payments will be issued upon receipt of appropriate documentation (e.g., vendor invoice, purchase order, packing slip, etc.) Procedures: ExED employs two methods for issuing vendor payments: **Bank Checks** 1. The Governing Board will approve, in advance, the list of authorized signers on the school account. The Director, the Board Treasurer, and any other employee authorized by the Governing Board may sign bank checks within established limitations. 2. The Governing Board will be authorized to open and close bank accounts. 3. When there is a need to generate a bank check, the Director and/or Principal will send appropriate approved documentation to ExED. 4. Once approved by the Director and/or Principal, ExED types/writes the check based on the check authorization prior to obtaining the appropriate signature(s). 5. The Director and a Member of the Board will approve checks in excess of \$10,000. All non-budgeted, non-recurring invoice payments over \$10,000 will require the approval of the director and a member of the board. 6. Checks may not be written to cash, bearer, or petty cash. Under no circumstance will any individual sign a blank check. 7. ExED will record the check transaction(s) into the appropriate checkbook and in the general ledger. 8.ExED will distribute the checks and vouchers as follows: a. Original –mailed or delivered to payee b. Duplicate or voucher–attached to the invoice and filed by vendor name by an ExED accountant. c. Cancelled Checks–filed numerically with bank statements by an ExED accountant. d. Voided checks will have the signature line cut out and will have VOID written in ink. The original check will be attached to the duplicate and forwarded to ExED who will attach any other related documentation as appropriate. **Nvoicepay (outsourced payment provider)** •Once an invoice is



approved by Director and/or Principal for payment, the ExED Accounting Analyst will submit the invoice to Nvoicepay for payment. The ExED AM or VP will review the payments submitted to Nvoicepay and will approve or reject each vendor payment. •After ExED has approved a vendor payment, Nvoicepay will electronically withdraw funds from the organization’s bank account and transfer the funds to a Nvoicepay trust account. Each vendor payment will be a separate bank withdrawal and a separate line on the bank statement. Nvoicepay will then issue payments to the organization’s vendor. The payments are disbursed from Nvoicepay’s trust account via one of three payment methods: Check, ACH, or payment card. The payments will include a Reference ID that ExED will record as the transaction number in ExED’s accounting system. The Reference ID will not be in sequence as it is based on Nvoicepay’s numbering system. •Nvoicepay will save an electronic check copy for any paper checks issued and Nvoicepay will save vendor remittances for any ACH or payment card payments issued. •Nvoicepay will stale date payments after 60 days. When this situation happens, Nvoicepay will void the payment and credit the funds back to the organization's bank account. ExED may also direct Nvoicepay to reissue a payment prior to the 60-day deadline. In this case, Nvoicepay will void the original payment and issue a new payment. The new payment will be recorded as a payment modification and will be linked to the original payment in Nvoicepay. The new payment will have a new Reference ID for tracking purposes; however, the new Reference ID will not be updated in ExED’s accounting system where the original Reference ID is recorded as the new transaction is only impacting Nvoicepay’s account.”

In response to the CSD’s observation above, PazLo’s Executive Director (ED) explained: “A new internal monitoring system is being developed along with respective training with multiple PazLo personnel to ensure all payments are followed through from requisition to payment issuance. We expect this issue to also be resolved as we move out of the Bernstein Complex, as we have expressed to [the CSD staff] ongoing mail delivery issues over the last decade, largely due to turnover in staff handling mail and logistical planning issues with the co-located schools particularly over the last 3 years.”

The CSD recommends that the school strictly follow PazLo’s fiscal policies and procedures regarding timely payment of invoices. The CSD also 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 and/or other charges in the future.

The governing board and leadership team of the charter school are responsible for managing the operations of the school. Thus, the CSD’s recommendations the school’s action plans concerning the above-noted findings and observations should be discussed at PazLo’s next governing board meeting, highly preferably no later than 90 days following the school’s receipt of this report. It is the school’s responsibility to provide the CSD its action plans/steps, proof of implementation of the mitigating actions taken by the school, and/or documentation (e.g., governing board meeting agendas and approved board meeting minutes, etc.), as applicable, prior to or during the next Annual Performance-Based Oversight Visit. The CSD will continue to monitor these issues through oversight.

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

1. Student Enrollment (Under-Enrollment):

As summarized in the table below, the school’s reported Norm Enrollment was 15, 183, 192, 169, and 181 students for Fiscal Years 2018-2019, 2019-2020, 2020-2021, 2021-2022, and 2022-2023, respectively, representing an accumulated increase of 166 students or 1,106.67% since Fiscal Year 2018-2019 (when Matrix reported 15 students in its first year of operation). The school’s reported Norm Enrollment for Fiscal Year 2022-2023 is 181students, which is 419 students (or approximately 69.83%) below its projected student enrollment for Fiscal Year 2022-2023 (i.e., 600 students) per the school’s petition enrollment roll-out plan in its current charter.



Matrix for Success Academy - Norm Enrollment History					
Grade Level	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
9th		19		6	5
10th	1	44	13	3	20
11th	3	52	51	12	20
12th	11	68	128	148	136
Total Enrollment	15	183	192	169	181
Increase/(Decrease) in Enrollment From Prior Year	N/A	168	9	(23)	12
Enrollment Growth/(Decrease) %	N/A	1,120.0%	4.9%	(12.0%)	7.1%

In response to the CSD’s observations above, PazLo’s ED explained: “The COVID-19 pandemic severely affected growth in the 2019-20 school year (shutdown in second half of year) and stopped any expansion and growth in the 2020-21 school year (statewide limitations caps on nonclassroom based schools expansion, given that all schools system could offer independent study - Budget Trailer Bill (SB 98, 2020) for 2 years). Matrix could not have expanded or grown technically until the current 2022-23 school year, however [the school] has over that period of time where [the school] could not grow or expand due to the reasons stated above, worked on building our reserves and "saving up" to be able to responsibly expand into a second site during the 2023-24 school year as planned. Additionally, [the school] is also pursuing expansion opportunities in the San Fernando Valley as delineated on [the school’s] charter petition. The plan per [the school’s] charter is to establish 3 sites roughly enrolling 200 students each, thus reaching our 600 capacity. Coming out of the pandemic restrictions on nonclassroom based schools and having built some reserves, [Matrix] believes [the school is] positioned to make the expansion a reality over the next year.” In April 2023, PazLo signed a new lease agreement with Berendo Street Baptist Church for a term of one year and one month starting June 1, 2023 through June 30, 2024, for \$13,334 per month payable on the first of each month. The execution of the lease agreement required PazLo to pay the June 2023 rent of \$13,334 in advance, one month share of property tax amounting to \$166, and two-months security deposit of \$26,668 or a total aggregate amount of \$40,168. The PazLo’s ED stated: “In terms of the lease for the [second] site, there's clean up and set up to do in June prior to moving anything or anybody in, thus [PazLo does] not expect to set up shop until it is all set up (office desks, connectivity, phones, Wi-Fi, etc.). As stated on the close out of APEX, it will serve as the PazLo office to support [APEX’s] families during the transition as the 2nd site is a couple of miles south from APEX.”

As noted above the school has maintained a balanced budget for Fiscal Year 2021-2022 and projects a balanced budget for Fiscal Year 2022-2023 per its 2022-2023 Second Interim Financials. Enrollment/student attendance plays a vital role in the viability of a school and its ability to have not only a balanced budget, but a robust and effective high school program. The CSD will continue to monitor closely the school’s financial condition and its student enrollment through ongoing oversight, including Matrix’s second service center that is scheduled to open in Fiscal Year 2023-2024.

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

Based on the CSD’s review of PazLo’s Bank Reconciliation Reports for the months of May 2022 through October 2022, the CSD noted that the



June 2022 Bank Reconciliation Report for the bank account ending in X4714 was prepared on September 13, 2022, and approved on September 14, 2022, respectively, which is 45 days past the approval deadline.

Page 8 of the APEX Academy/Matrix for Success Academy’s Fiscal Policies and Procedures Handbook, “*Bank reconciliation and approval will occur on a monthly basis*”. Procedures: ● The ExED Accounting Associate or Senior Accounting Associate (AA/SAA) assigned to the organization will print the bank statements directly from the online banking system. If online banking is unavailable, the organization will make copies of the original statement available to ExED. ● The ExED AA/SAA will prepare the bank reconciliation using the ExED’s bank reconciliation workbook. ● The Accounting Manager or Vice President, School Finance assigned to the organization will review and approve the bank reconciliation workbook by completing the approval tab of the bank reconciliation workbook.”

In response to the CSD’s observations above, PazLo’s Executive Director stated: “Bank reconciliation and approval takes place as indicated on our fiscal policies and procedures, except for the June financials as typically these are not completed by the time of the July regular Board meeting. In terms of board approval of June and July financials for 2022, that took place at the October 4, 2022, meeting as meetings had to be postponed due illness/COVID issues affecting Board Members and Staff in August and September.”

The CSD will continue to monitor PazLo’s bank reconciliation preparation and approval through oversight. The results may be factored into the school’s rating for next year,

Corrective Action Required:

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

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

1. Reviewed independent audit report for the Fiscal Year ended June 30, 2022, and noted the following:
 - a. Audit opinion: Unmodified/Unqualified.
 - b. Material weaknesses: None Reported.
 - c. Deficiencies/Findings: None Reported.
 - d. Lack of a Going Concern: None Reported.
2. The 2021-2022 audited and unaudited actuals nearly mirror each other.
3. A Segregation of Duties (SOD) review was conducted at PazLo Education Foundation/APEX Academy. No discrepancies were noted.
4. Reviewed 30 checks (and 9 electronic credit/debit transactions). Discrepancies were noted under Areas Noted for Further Growth and/or Improvement above.
5. Reviewed bank statements and bank reconciliations from May 2022 through October 2022. Selected the months of May 2022, June 2022, July 2022, September 2022 and October 2022 for sample testing. The CSD's observations were noted under the Other Observations section above.

II. Review of 2022-2023 Fiscal Preparation Guide

1. Most current fiscal reports presented to the charter school's governing board: a) Balance Sheet; b) Income Statement (Statement of Activities), and c) Cash Flow Statement were provided.
2. Minutes of the meeting when the above fiscal reports (i.e., Items 1a., 1b., and 1c.) were presented to and approved by the charter school's governing board were provided.
3. Audit/fiscal reports issued by any public agency or third-party organizations, and the school's governing board minutes of all meetings reflecting the discussion of any of the fiscal reports and applicable audit findings resolution/corrective action were not provided as the charter school has indicated not applicable.
4. Minutes of the meeting when the 2022-2023 budget was adopted were provided.
5. Evidence of the charter school is offering STRS, PERS, Social Security, and/or any other benefits to its employees, and that this is done in a manner that is consistent with the charter terms and the Charter Schools Act (Education Code 47611) was provided.
6. Minutes of the meeting reflecting the selection of the independent auditor were provided.
7. Minutes of the meeting reflecting the discussion of the most current independent audit report were provided.
8. Minutes of the meeting reflecting the receipt, review, and discussion of the most current four interim financial reports (i.e., preliminary budget, first interim and second interim financial reports, and unaudited actuals) submitted to LAUSD were provided.
9. Minutes of the meeting reflecting the discussion and resolution of complaints received from staff or vendors were not provided as the charter school has indicated not applicable.
10. Minutes of the meeting reflecting the receipt, review, and discussion of the most current Annual Performance-Based Oversight Visit report were provided.
11. A copy of the most current fiscal policies and procedures was provided.
12. Minutes of the meeting reflecting approval of the current fiscal policies and procedures and, if applicable, minutes of the meeting reflecting the approval of the current procurement policies and procedures were provided.
13. A copy of the charter school's organizational chart that depicts the current reporting structure of the charter school, including but not limited to, any board members, charter management organization (CMO) employees (when applicable), and/or school employees, who handle day-to-day finances and/or have responsibilities outlined within the charter school's fiscal policies and procedures was provided.



14. An itemized accounting regarding the total compensation paid in Fiscal Year 2021-2022 to all executives, school leaders, administrators, directors, and non-certificated staff, who may have decision-making authority over the charter school, either employed directly by the charter school or the entity managing the charter school was provided.
15. A description of the relationship (legal, business or otherwise) the charter school maintains with any related party as defined in the CSD's 2022-2023 Fiscal Preparation Guide Item 14 was not provided as the charter school has indicated not applicable.
16. Copies of any and all of the most current signed and executed agreements/contracts within the last year (i.e., 2021-2022) or since the last update, whichever is later (including attachments and exhibits that accompany the agreements/contracts) with the administrative services provider and/or the back office services provider, or the charter school's operator and/or charter school's home office (e.g., management contracts, service agreements, license agreements, affiliation agreements, etc.) were provided.
17. Minutes of the meeting reflecting approval of the management fees, licensing fees, or any other fees were provided.
18. A copy of the sole statutory member's by-laws, and a copy of the sole statutory member's articles of incorporation were not provided as the charter school has indicated not applicable.
19. The most current accounts payable aging report, listing the balances owed, vendor names, invoice numbers, invoice dates, number of days outstanding, and, if applicable, explanations for 90+ days outstanding invoice(s) or in accordance with the charter school's fiscal policies and procedures was provided. No discrepancies were noted.
20. Check registers documenting all checks and electronic debit transactions for the prior 12 months (spanning from 1/2022 to 12/2022) were provided. The CSD's observations were noted under the Areas Noted for Further Growth and/or Improvement above.
21. a) A list of all active credit card account(s), b) (If applicable) A list of all closed credit card account(s) within the last year, and c) All credit card statements for the most current six months (spanning from 6/2022 to 11/2022) were not provided as the charter school has declared that it has no credit cards at this time.
22. a) A list of all active school bank account(s), b) (If applicable) A list of all closed school bank account(s) within the last year, c) Monthly bank statements, budgets, cash flow and reconciliation reports for the most current six months (spanning from 5/2022 to 10/2022), and d) (If applicable) A list of all debit cards were provided. The CSD's observations were noted under the Other Observations section above.
23. Student body financial records (including ASB policies and procedures, statements and projections, bank statements with reconciliations, audit reports, and other fiscal reports, if applicable) were not provided as the charter school has indicated not applicable.
24. The most current inventory listing for both capitalized and non-capitalized equipment, in Microsoft Excel format, including equipment description/type, brand/model, tag number, acquisition date, purchasing price, book value, asset life, and location of use was provided.
25. A link to the charter school's website where the Education Protection Account (EPA) revenue and expenditures report pertaining to the prior fiscal year (i.e., 2021-2022) is posted (as required by Article XIII, Section 36, Subdivision e, Paragraph (6) of the California Constitution) was provided.
26. Links to the charter school's website where the current (1) Audited Financial Statements, and (2) Local Control and Accountability Plan (LCAP) are posted (or the school's assertion that its Audited Financial Statements are made available to members of the public) in accordance with Education Code section 47606.5(h) and/or LAUSD's Charter School Transparency Resolution were provided.
27. Documents pertaining to the school's financing/borrowing activities were provided. PazLo's 2021 - 2022 audit report (Note 7) discloses: "In September 2019, the organization entered into a loan agreement to borrow \$150,000 through the Charter Revolving Loan Fund Program administered by the California School Finance Authority (CSFA). The loan was to assist with operations of Matrix for Success Academy. The loan is to be repaid over a three-year period ending January 2023. The revolving note bears an annualized interest rate equal to the "prime rate" of 1.976%. During the fiscal year ended June 30, 2022, the Organization made payments of \$51,769, which included \$49,998 of principal and \$1,771 of interest expense. As of June 30, 2022, the outstanding balance on the loan was \$50,004 which is due in the fiscal year ending June 30, 2023."



28. The charter school’s plan(s) for the purchase/new lease, relocation/expansion to new school site(s), facilities-related expansions, and/or major improvements to the existing and/or new school site(s) and pertinent documents with the following information, as appropriate were provided.

- i. Charter School Name (For CMO Schools): Matrix for Success Academy
- ii. Address of the New/Expanded Property/Construction Site: 975 S. Berendo Street, Los Angeles, CA 90006 (a new/second service center, as part of Matrix’s approved petition)
- iii. Construction Start Date: N/A
- iv. Estimated Project Completion Date: N/A
- v. Projected Total Cost: N/A
- vi. Purpose of Project/Construction: N/A
- vii. Current Project Status: N/A
- viii. Financing Sources (description/amount): N/A
- ix. Estimated Move-In Date: July 1, 2023

Per the lease agreement furnished to the CSD, in April 2023, PazLo signed a new lease agreement with Berendo Street Baptist Church for a term of one year and one month starting June 1, 2023 through June 30, 2024, for \$13,334 per month payable on the first of each month. The execution of the lease agreement required PazLo to pay in advance the June 2023 rent of \$13,334, one month share of property tax amounting to \$166, and two-months security deposit of \$26,668 or a total aggregate advance payment of \$40,168.

29. Disclosure of legal issues was not provided as the charter school has indicated not applicable.

30. Matrix confirmed the filing of its SB 740 nonclassroom-based funding determination request with the California Department of Education (CDE) and the State Board Education’s (SBE) approval for 100% funding for Fiscal Years 2022–2023 through 2023–2024. The next funding determination due date is 2/1/2024. The CSD will continue to monitor the school’s SB 740 nonclassroom-based funding determination request and the SBE’s approval through oversight.

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

N/A



Fiscal Operations Rubrics

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

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

<p><i>An existing school that, at a minimum, meets all of the Required Criteria and at least four of the Supplemental Criteria listed below would be assessed eligible to be considered as <u>Accomplished [Rating of 4].</u></i></p>	<p><i>An existing school that, at a minimum, meets all of the Required Criteria and at least three of the Supplemental Criteria listed below would be assessed eligible to be considered as <u>Proficient [Rating of 3].</u></i></p>
<p><u>Existing Schools (based on the most current annual audit):</u></p> <p style="text-align: center;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. Net assets are positive in the prior two audits; 2. The cash balance at the beginning of the school year is positive; 3. The two most current annual independent audits show no material weaknesses, deficiencies, and/or findings; 4. If applicable, federal, state, and other public agency audits/reviews (e.g., California State Teachers’ Retirement System (CalSTRS), California Public Employees’ Retirement System (CalPERS), Fiscal Crisis & Management Assistance Team (FCMAT), United States Department of Education (USDE), California Department of Education (CDE), etc.), at the time of the oversight visit, show no outstanding material weaknesses, deficiencies, and/or findings; 5. Vendors and staff are consistently paid in a timely manner; 6. Governing board approves Fiscal Policies and Procedures, at a minimum, once prior to each charter renewal term; 7. Charter school consistently adheres to the governing board-approved Fiscal Policies and Procedures; 8. Governing board adopts the annual budget; 9. Governing board reviews and/or discusses reports (e.g., first interim, second interim, unaudited actuals, audited financial statements, etc.) submitted to LAUSD; 10. If applicable, governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 11. There is no apparent conflict of interest; 12. The Education Protection Account allocation and expenditures, audited financial statements, and the most current governing board-approved 	<p><u>Existing Schools (based on the most current annual audit):</u></p> <p style="text-align: center;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. Net assets are positive in the most current audit; 2. The cash balance at the beginning of the school year is positive; 3. The most current annual independent audit shows no material weaknesses, deficiencies and/or findings; 4. If applicable, federal, state, and other public agency audits/reviews (e.g., CalSTRS, CalPERS, FCMAT, USDE, CDE, etc.), at the time of the oversight visit, show outstanding findings, and the school is able to demonstrate evidence of remedies in addressing these findings; 5. Vendors and staff are generally paid in a timely manner; 6. Governing board approves Fiscal Policies and Procedures, at a minimum, once prior to each charter renewal term; 7. Charter school generally adheres to the governing board-approved Fiscal Policies and Procedures; 8. Governing board adopts the annual budget; 9. Governing board reviews and/or discusses reports (e.g., first interim, second interim, unaudited actuals, audited financial statements, etc.) submitted to LAUSD; 10. If applicable, governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 11. There is no apparent conflict of interest; 12. The Education Protection Account allocation and expenditures, audited financial statements, and the most current governing board-approved LCAP are posted on the charter school’s website; 13. The LCAP is submitted to the appropriate agencies;



<p><i>An existing school that, at a minimum, meets all of the Required Criteria and at least four of the Supplemental Criteria listed below would be assessed eligible to be considered as <u>Accomplished [Rating of 4].</u></i></p>	<p><i>An existing school that, at a minimum, meets all of the Required Criteria and at least three of the Supplemental Criteria listed below would be assessed eligible to be considered as <u>Proficient [Rating of 3].</u></i></p>
<p>LCAP submitted to the appropriate agencies, are posted on the charter school’s website;</p> <ol style="list-style-type: none"> 13. The LCAP is submitted to the appropriate agencies; 14. Reasonable requests for information made by the Charter Schools Division and LAUSD are consistently processed or submitted by the charter school in a timely manner; 15. There are no discrepancies cited in the Areas Noted for Further Growth and/or Improvement; 16. If applicable (when audited and unaudited actuals do not mirror each other), adequate explanations are provided by the school for significant variances between audited and unaudited actuals, and there are no indications of the school's potential lack of internal controls over financial statements; 17. Proper segregation of duties is consistently in place; 18. If applicable, there are no outstanding fiscal-related tiered intervention notices issued to the school; or the school has no tiered intervention notices as of the oversight report issuance date; and 19. If applicable, all LAUSD Board of Education-approved fiscal benchmark(s) are fully met by the required deadline(s); or the school has no fiscal benchmarks in its current charter term. <p><u>Note:</u> Other circumstances and information could influence the rating, which may include the supplemental criteria below, and will be noted in the evaluation.</p> <p style="text-align: center;"><u>SUPPLEMENTAL CRITERIA</u></p> <ol style="list-style-type: none"> 1. The school maintains the minimum reserve for economic uncertainties as defined in California Code of Regulations (CCR), Title 5, Section 15450 (https://www.law.cornell.edu/regulations/california/5-CCR-Sec-15450) per the most current audit (i.e., unrestricted fund balance divided by total expenditures); 2. The cash balance at the beginning of the school year is at least 5% of the prior year’s expenses; 	<ol style="list-style-type: none"> 14. Reasonable requests for information made by the Charter Schools Division and LAUSD are generally processed or submitted by the charter school in a timely manner; 15. There are no significant recurring issues cited in the Areas Noted for Further Growth and/or Improvement; 16. If applicable (when audited and unaudited actuals do not mirror each other), at least partial explanations are provided by the school for significant variances between audited and unaudited actuals, and there are no indications of the school's potential lack of internal controls over financial statements; 17. Proper segregation of duties is generally in place; 18. If applicable, the charter school is in the process of resolving outstanding fiscal issues cited in a Notice issued by the CSD as part of its tiered intervention process; and 19. If applicable, all LAUSD Board of Education-approved fiscal benchmark(s) are partially met by the required deadline(s). <p><u>Note:</u> Other circumstances and information could influence the rating, which may include the supplemental criteria below, and will be noted in the evaluation.</p> <p style="text-align: center;"><u>SUPPLEMENTAL CRITERIA</u></p> <ol style="list-style-type: none"> 1. The school maintains the minimum reserve for economic uncertainties as defined in California Code of Regulations (CCR), Title 5, Section 15450 (https://www.law.cornell.edu/regulations/california/5-CCR-Sec-15450) per the most current audit (i.e., unrestricted fund balance divided by total expenditures); 2. The cash balance at the beginning of the school year is at least 5% of the prior year’s expenses; 3. Enrollment is stable or changing at a manageable rate (e.g., the school still maintains a balanced budget, etc.);



<p><i>An existing school that, at a minimum, meets all of the Required Criteria and at least four of the Supplemental Criteria listed below would be assessed eligible to be considered as <u>Accomplished</u> [Rating of 4].</i></p>	<p><i>An existing school that, at a minimum, meets all of the Required Criteria and at least three of the Supplemental Criteria listed below would be assessed eligible to be considered as <u>Proficient</u> [Rating of 3].</i></p>
<ol style="list-style-type: none"> 3. Enrollment is stable or changing at a manageable rate (e.g., the school still maintains a balanced budget, etc.); 4. The school maintains sound short-term financial viability (i.e., current ratio is recommended to be at least 1.2 or 120%); 5. The school maintains sound long-term financial sustainability (i.e., debt ratio is recommended to be lower than 1.0 or 100%); and 6. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at governing board meetings. 	<ol style="list-style-type: none"> 4. The school maintains sound short-term financial viability (i.e., current ratio is recommended to be at least 1.2 or 120%); 5. The school maintains sound long-term financial sustainability (i.e., debt ratio is recommended to be lower than 1.0 or 100%); and 6. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at governing board meetings.

<p><i>An existing school that, at a minimum, meets all of the Required Criteria, and at least two of the Supplemental Criteria listed below would be assessed eligible to be considered as <u>Developing</u> [Rating of 2].</i></p>	<p><i>An existing school would be assessed as <u>Unsatisfactory</u> [Rating of 1] based on the statements below:</i></p>
<p style="text-align: center;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. Net Assets are positive in the most current audit; net assets are negative with strong trend towards becoming positive (be positive at the end of the third year per the applicable interim financials); or the school's financial condition fluctuates from year to year, with significant net losses, leading to negative net assets in the current fiscal year and/or the foreseeable future fiscal years; 2. The cash balance at the beginning of the school year is positive; and 3. Governing board approves Fiscal Policies and Procedures, at a minimum, once prior to each charter renewal term. <p><u>Note:</u> Other circumstances and information could influence the rating, which may include the supplemental criteria below, and will be noted in the evaluation.</p>	<p><i>An Unsatisfactory rating is assessed based on the following conditions, including, but not limited to:</i></p> <p>A charter school is assessed as Unsatisfactory if the charter school does not meet the criteria for <i>Accomplished</i>, <i>Proficient</i>, or <i>Developing</i>. The charter school was given a certain period of time to address the fiscal concerns of LAUSD, but failed to provide a satisfactory response. The charter school has shown no <i>feasible</i> financial plans, and/or immediate sources of funding to maintain a viable budget and/or sustain the school's operation to mitigate the negative fiscal condition. The charter school's governing board members and/or leadership lack fiscal capacity.</p> <p>Continued operation of a charter school that is assessed as Unsatisfactory may result to non-implementation of instructional programs as provided in the petition.</p> <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>



An existing school that, at a minimum, meets all of the Required Criteria, and at least two of the Supplemental Criteria listed below would be assessed eligible to be considered as Developing [Rating of 2].

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

SUPPLEMENTAL CRITERIA

1. The school maintains the minimum reserve for economic uncertainties as defined in California Code of Regulations (CCR), Title 5, Section 15450 (<https://www.law.cornell.edu/regulations/california/5-CCR-Sec-15450>) per the most current audit (i.e., unrestricted fund balance divided by total expenditures);
2. The cash balance at the beginning of the school year is at least 5% of the prior year's expenses;
3. Enrollment is stable or changing at a manageable rate (e.g., the school still maintains a balanced budget, etc.);
4. The school maintains sound short-term financial viability (i.e., current ratio is recommended to be at least 1.2 or 120%);
5. The school maintains sound long-term financial sustainability (i.e., debt ratio is recommended to be lower than 1.0 or 100%); and
6. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at governing board meetings.

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

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

New Schools:

REQUIRED CRITERIA

1. Interim reports and/or unaudited actuals project positive net assets;
2. Projected debt, if any, is managed efficiently and will not cause the charter school to end the fiscal year with negative net assets. The non-profit organization is financially viable to support the charter school;
3. If enrollment is significantly below the enrollment per the school's *Pupil Estimates for New or Significantly Expanding Charters* report and/or its approved petition budget, the charter school has made

New Schools:

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

*A charter school is assessed as Unsatisfactory if the charter school does not meet the criteria for *Developing*. The charter school was given a certain period of time to address the fiscal concerns of LAUSD but failed to provide a satisfactory response. The charter school has shown no *feasible* financial plans, and/or immediate sources of funding to maintain a viable budget and/or sustain the school's operation to*



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

significant adjustments in their operations to allow for the reduced income, and submitted a revised viable three-year budget and three-year cash flow projections;

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

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

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

mitigate the negative fiscal condition. The charter school’s governing board members and/or leadership lack fiscal capacity.

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

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