



LOS ANGELES UNIFIED SCHOOL DISTRICT CHARTER SCHOOLS DIVISION

ANNUAL PERFORMANCE-BASED OVERSIGHT VISIT REPORT* **2019-2020 SCHOOL YEAR (REMOTE VERSION)**** FOR

Matrix for Success Academy 2458

Name and Location Code of Charter School

LAUSD Vision

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

CSD Mission

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

CSD Core Values

We believe that our success depends on:

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

* 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.

**** In light of the COVID-19 outbreak, this oversight report was developed and finalized as part of a remote oversight process. The remote oversight process included the following: review of the Office of Data and Accountability (ODA) data set, review of previous years' oversight reports, review of any tiered intervention notices, discussions with school leaders, and review of documentation placed in an electronic document system.**



Charter School Name: Matrix for Success Academy		Location Code: 2458	
Current Address: 1010 E. 34th St.		City: Los Angeles	ZIP Code: 90011
Phone: (323) 897-5971		Fax: (504) 817-6550	
Current Term of Charter: July 1, 2018 to June 30, 2023		LAUSD Board District: 5	LAUSD District: Central
Number of Students Currently Enrolled: 268	Enrollment Capacity Per Charter: 600	Grades Currently Served: 9-12	Grades To Be Served Per Charter: 9-12
Total Number of Staff Members: 23	Certificated: 9	Classified: 14	
Charter School's Leadership Team Members:		Cesar Lopez, Executive Director; Michael Hisel, Site Coordinator; Margret Woelke, Assistant Site Coordinator	
Charter School's Contact for Special Education:		Michael Hisel, Site Coordinator	
CSD Assigned Administrator: Jose Rodriguez	CSD Fiscal Services Manager: Lourdes Echavarria		
Other School/CSD Team Members:	N/A		
REMOTE Oversight Visit Date(s):	May 28, 2020	Fiscal Review Date (if different):	N/A
Is school located on a District facility? If so, please indicate the applicable program (e.g. Prop 39, PSC, conversion, etc.):	N/A	LAUSD Co-Location Campus(es) (if applicable):	N/A
		DATE OF CO-LOCATION MEETING WITH OPERATIONS TEAM:	N/A

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



CHARTER RENEWAL CRITERIA

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

REPORT GUIDE

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

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

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

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

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

This report, including the ratings in each category, is based on information and evidence gathered at the time of the annual oversight visit. The CSD considers evidence provided through CSD staff observations, document review, interviews, and discussion with school representatives and stakeholders. All charter schools are expected to prepare for the visit and have available, as applicable, all documentation requested in the *Annual Performance Based Oversight Visit Preparation Guide 2019-2020*. The “Sources of Evidence” sections below identify key information sources generally relevant to their respective indicators; these lists are not exhaustive, however, and some items may not be applicable to the grades served. Schools may present additional evidence as deemed relevant and appropriate. As needed, CSD staff also may request additional information and/or documentation prior to, during, and/or following the visit.

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



GOVERNANCE	RATING*
Summary of School Performance	3
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p>G1: GOVERNANCE STRUCTURE AND EVALUATION OF SCHOOL LEADER(S) The Governing Board has substantially implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and an adequately developed system for the evaluation of the school leader(s). Based on the binder review and interviews with school leadership, the school provided the following evidence:</p> <ul style="list-style-type: none"> • The school has implemented the organizational structure outlined in its charter • The current roster of Board members (6), and the school’s website includes an email address to contact Board members • Governing bylaws, adopted on February 28, 2017 • • School council(s) are in place as evidenced by the following documentation: <ul style="list-style-type: none"> ○ ELAC 11/21/19, sign-in and agenda as follows: Mental Health Resources, Human Trafficking, notification of Spring Testing ○ PAC 11/21/2019, agenda as follows: Mental Health resource, Human Trafficking, ELPAC and SBAC testing • The school utilizes the California Professional Standards for Educational Administrators (CPSELs) Rubric of Professional Criteria to evaluate charter school leaders. The framework includes the following criteria: Plan and Implement Activities Around the Vision, Allocate Resources to Support the Vision, Develop, School Culture and Ensure Equity, Guide the Instructional Program, Guide to Professional Growth of Staff, Create and Utilize Accountability Systems, Ensure a Safe School Environment, Create an Infrastructure to Support an Effective Learning Environment <p>G2: BROWN ACT The Governing Board complies with most material provisions of the Brown Act. Based on the binder review, the school provided the following evidence:</p> <ul style="list-style-type: none"> • Regular Governing Board meetings occurred on the following dates: 7/23/2019, 7/29/2019 (Special), 8/27/2019, 9/24/2019, 10/22/2019, 12/3/2019, 1/18/2020 (meeting and retreat), 1/28/2020, 1/30/2020 (Special), 2/25/20, 3/24/20 and 4/21/20 • Governing Board meeting agendas and minutes are posted and maintained on the schools’ website • Agendas items provide enough information to understand what is being discussed during the meeting • The most recent Brown Act Training occurred on January 26, 2019 <p>G3: DUE PROCESS 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. Based on the binder review, the school provided the following evidence:</p> <ul style="list-style-type: none"> • A Parent/Student Handbook which delineates grievance procedures for Parents, Students and Stakeholders • Human resource policies delineate grievance procedures for employees • The school Uniform Complaint Procedures (UCP) is included in the Parent/Student Handbook and posted on the school’s website • The UCP identifies the compliance officer, notifications, procedures and steps in filing a complaint, mediation, investigation, response, final written decision and appeals to the California Department of Education 	



Areas Noted for Further Growth and/or Improvement

G5: DATA-BASED DECISION-MAKING

The Governing Board inconsistently monitors school performance and other internal data to inform decision-making. Although, the Governing Board has a standing Director's update, evidence in binder one did not demonstrate that the board consistently reviews and uses academic and other internal school data and information to ensure sound Governing Board decision-making in support of continuous improvement of student achievement.

Corrective Action Required

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

Notes:

On December 16, 2019, the Charter Schools Division issued Matrix for Success Charter, a Notice to Cure related to the school's lack of compliance with Independent Study Program requirements set forth in the charter and applicable law. At the time of issuing this report, the organization has responded to the Notice as requested and the CSD through ongoing oversight will monitor the progress of this Notice and the school's progress in ensuring compliance with the school's charter and applicable law pertaining to the Independent Studies Program and Master Agreements.

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



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

<p><i>The Governing Board has implemented the organizational structure, roles and responsibilities set forth in the approved charter, including:</i></p> <ul style="list-style-type: none"> Governing Board (composition, structure, roles and responsibilities) committees/councils (for example, SSC and ELAC [including legally required topics] as applicable), including but not limited to those mandated by laws or regulations Evaluation of school’s executive level leadership 		
	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The Governing Board has fully implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and a highly developed system for the evaluation of the school leader(s) <input checked="" type="checkbox"/> The Governing Board has substantially implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and an adequately developed system for the evaluation of the school leader(s) <input type="checkbox"/> The Governing Board has partially implemented the organizational structure set forth in approved charter, including any mandated committees/councils, and a partially developed system for the evaluation of the school leader(s) <input type="checkbox"/> The Governing Board has not implemented the organizational structure set forth in approved charter or any mandated committees/councils, and no system for the evaluation of the school leader(s)	<input checked="" type="checkbox"/> Organizational chart (B1.1) <input checked="" type="checkbox"/> Bylaws (B1.2) <input checked="" type="checkbox"/> Board member roster (B1.3) <input checked="" type="checkbox"/> Board meeting agendas, and minutes (B1.4) <input checked="" type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Committee/council calendars, agendas, minutes and sign-ins (B1.6) <input checked="" type="checkbox"/> Documentation related to system for evaluation of executive level administrator(s) who reports to the Board. (B1.7) <input checked="" type="checkbox"/> Discussion with leadership <input type="checkbox"/> Other: (Specify)

G2: BROWN ACT - GOVERNANCE QUALITY INDICATOR #2

<p><i>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:</i></p> <ul style="list-style-type: none"> Governing Board meetings occur regularly, are conducted openly, and provide opportunity for public participation in accordance with the Brown Act Governing Board holds its meetings at a location(s) and in a manner that complies with teleconferencing, closed session, and access and Reasonable Accommodation requirements and the public has access to the meetings from a location(s) within the jurisdictional boundaries of LAUSD, as noted in the charter petition Governing Board meeting agendas and minutes are posted and maintained, as appropriate, including on the school’s website and in accordance with the Brown Act and with sufficient specificity 		
	Rubric	Sources of Evidence



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 (B1.8) <input checked="" type="checkbox"/> Documentation of the school’s agenda posting procedures (B1.9) <input checked="" type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with school leadership <input checked="" type="checkbox"/> Other: (Specify) COVID-19 UPDATE – Board Meetings
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G3: DUE PROCESS - GOVERNANCE QUALITY INDICATOR #3

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

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

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



G4: STAFFING - GOVERNANCE QUALITY INDICATOR #4

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

- The Governing Board has established policies and procedures to ensure that faculty, staff, substitute teachers, and other persons providing service in a certificated position, are appropriately credentialed, authorized and/or otherwise qualified for the positions for which they have been employed/contracted and assigned, in accordance with applicable provisions of law and the school’s charter.
- The Governing Board has established policies and procedures to ensure that the school obtains all necessary employee clearances, including criminal background and tuberculosis (TB) clearances, prior to employment, and keeps all clearances current.
- The Governing Board has established policies and procedures to ensure that the school obtains, monitors, and maintains all necessary and appropriate vendor certifications/waivers regarding vendor employee clearances, including criminal background and tuberculosis (TB) clearances.
- The Governing Board has established policies and procedures regarding requirements for school volunteers, including criminal background clearances for all volunteers who perform school site services while not under the direct supervision of a school employee, and tuberculosis (TB) risk assessments/clearances for all volunteers with frequent or prolonged contact with students per AB 1667.
- The Governing Board has established and monitors policies governing whether and under what circumstances the school may consider, for paid and volunteer service, candidates who have criminal records.

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



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

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

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

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



G6: FISCAL CONDITION - GOVERNANCE QUALITY INDICATOR #6

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.

	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The school is fiscally strong with positive net assets in the prior two independent audit reports <input type="checkbox"/> The school is fiscally stable, with positive net assets in the most current independent audit report <input checked="" type="checkbox"/> The school is fiscally weak (e.g., inadequate cash flow, etc.) and/or 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 (e.g., inadequate cash flow, etc.) and/or 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	<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 checked="" type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with leadership <input checked="" type="checkbox"/> Independent audit report(s) <input checked="" type="checkbox"/> Other: (see Fiscal Operations section below) This rating is due to the school's current financial condition (negative net assets reflected in the school's 2018-2019 independent audit report and projected in its 2019-2020 Second Interim Report), including its cash reserve level (which is below the recommended 5%) and the school's practice of factoring its receivables.



G7: In light of COVID-19, the school may be unable to provide certain or all documentation to support transactions that were selected for testing for this indicator. If sufficient fiscal documentation is not available, a score will not be earned for this indicator and it will not impact the overall score for the Governance section.

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

<p>The Governing Board has a system in place to ensure sound fiscal management and accountability:</p> <ul style="list-style-type: none"> The school adheres to the Governing Board approved fiscal policies and procedures, and does not have any areas noted for improvement. 	
Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <input type="checkbox"/> The school adheres to the Governing Board approved fiscal policies and procedures, and does not have any areas noted for improvement <input checked="" type="checkbox"/> The school generally adheres to the Governing Board approved fiscal policies and procedures, but has areas noted for improvement <input type="checkbox"/> The school is not adhering to the Governing Board approved fiscal policies and procedures, and has areas noted for improvement, or has significant fiscal-related issues (e.g., fiscal mismanagement, audit findings, potential conflicts of interest, inadequate cash flow, etc.) <input type="checkbox"/> The school is continuously not adhering to the Governing Board approved fiscal policies and procedures, and has recurring areas noted for improvement, or has significant and recurring fiscal-related issues (e.g., fiscal mismanagement, audit findings, potential conflicts of interest, inadequate cash flow, etc.)
	<ul style="list-style-type: none"> <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 checked="" type="checkbox"/> Observation of Governing Board meeting <input checked="" type="checkbox"/> Discussion with leadership <input type="checkbox"/> Independent audit report(s) <input checked="" type="checkbox"/> Other: (see Fiscal Operations section below)

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



STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE	RATING*
Summary of School Performance	No Rating
<p>Is the charter school a state-identified school under the Every Student Succeeds Act (ESSA)? <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO</p> <p>If yes, what is the school’s identification? (See additional information within “Notes” section below)</p> <p><input type="checkbox"/> Comprehensive Support and Improvement (CSI)</p> <p><input type="checkbox"/> Additional Targeted Support and Improvement (ATSI)</p>	
<p><u>Areas of Demonstrated Strength and/or Progress</u></p> <p>This category receives “No Rating” because the school is in its second year of operations, and the 26 students tested did not generate enough data to evaluate performance in many of the indicators within this category.</p> <p><u>Areas Noted for Further Growth /or Improvement</u></p> <p>N/A</p> <p><u>Corrective Action Required</u></p> <p>None noted that require immediate action to remedy concerns indicated in this report.</p>	
<p>Notes:</p> <p>A1: SBAC SUBGROUP ELA No assessment of performance for this indicator</p> <p>A2: SBAC SUBGROUP MATH No assessment of performance for this indicator</p> <p>A3: SBAC SCHOOLWIDE ELA The schoolwide percentage of students who Met and Exceeded Standards in 3rd – 8th, 11th Grade on the SBAC in ELA is substantially lower than the Resident Schools Median (25.00% vs. 31.95%)</p> <p>A4: SBAC SCHOOLWIDE MATH</p>	



The schoolwide percentage of students who Met or Exceeded Standards in 3rd – 8th, 11th Grade on the SBAC in Math is substantially lower than the Resident Schools Median (0.0% vs.11.85%)

A5: ENGLISH LEARNER RECLASSIFICATION

The school did not reclassify English Learners

A6: “AT RISK” ENGLISH LEARNERS – (ELEMENTARY AND SECONDARY SCHOOLS)

The school’s percentage of “At Risk” English Learners is at rate lower than the Resident Schools Median (0.0% vs. 2.1%)

A7: LONG TERM ENGLISH LEARNERS (LTELs)

The school’s percentage of LTELs is at rate lower than the Resident Schools Median (13.6% vs. 17.1%)

A8: FOUR-YEAR ADJUSTED COHORT GRADUATION RATE

No assessment of performance for this indicator

A9: INTERNAL ASSESSMENT

No assessment of performance for this indicator

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

Graduation Requirements:

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.

****NOTE: A charter school cannot receive a rating in this category greater than a 2 if the school has not met the minimum statutory renewal criteria which requires clear and convincing evidence that the academic performance of the charter school is at least equal to the academic performance of the public schools that the charter school pupils would otherwise have been required to attend, as well as the academic performance of the schools in the school district in which***



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Matrix for Success Academy

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 5/28/2020

the charter school is located, taking into account the composition of the pupil population that is served at the charter school (e.g. Resident Schools) as measured in indicators A3 and A4.



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

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

- Performance of all numerically significant subgroups (30 or more students and 15 or more Foster Youth or Homeless students) on the CAASPP (SBAC) ELA (students with disabilities, English Learners, and socio-economically disadvantaged students, etc.)(CDE)
- In accordance with SB1290, increases in pupil academic achievement for all groups of pupils served by the charter school.

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> All subgroups demonstrated growth in CAASPP ELA performance from 2017-2018 to 2018-2019 <input type="checkbox"/> The majority of subgroups demonstrated growth in CAASPP ELA performance from 2017-2018 to 2018-2019 <input type="checkbox"/> Some subgroups demonstrated growth in CAASPP ELA performance from 2017-2018 to 2018-2019 <input type="checkbox"/> None of the school’s subgroups demonstrated growth in CAASPP ELA performance from 2017-2018 to 2018-2019 <input checked="" type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> SBAC report (CDE) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability’s Data Set (B2.1) <input type="checkbox"/> Other: (Specify)

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

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

- Performance of all numerically significant subgroups (30 or more students and 15 or more Foster Youth or Homeless students) on the CAASPP (SBAC) Math (students with disabilities, English Learners, and socio-economically disadvantaged students, etc.)(CDE)
- In accordance with SB1290, increases in pupil academic achievement for all groups of pupils served by the charter school,

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> All subgroups demonstrated growth in CAASPP Math performance from 2017-2018 to 2018-2019 <input type="checkbox"/> The majority of subgroups demonstrated growth in CAASPP Math performance from 2017-2018 to 2018-2019 <input type="checkbox"/> Some subgroups demonstrated growth in CAASPP Math performance from 2017-2018 to 2018-2019 <input type="checkbox"/> None of the school’s subgroups demonstrated growth in CAASPP Math performance from 2017-2018 to 2018-2019 <input checked="" type="checkbox"/> No assessment of performance for this indicator	<input checked="" type="checkbox"/> SBAC report (CDE) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability’s Data Set (B2.1) <input type="checkbox"/> Other: (Specify)



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

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

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

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



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

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

- English Learner reclassification rate for 2018-2019 (CDE)

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The school reclassifies English Learners at a rate higher than the Resident Schools Median <input type="checkbox"/> The school reclassifies English Learners at a rate similar to the Resident Schools Median <input type="checkbox"/> The school reclassifies English Learners at a rate lower than the Resident Schools Median <input checked="" type="checkbox"/> The school did not reclassify English Learners <input type="checkbox"/> No assessment of performance for this indicator	<input type="checkbox"/> Reclassification report (CDE) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability’s Data Set (B2.1) <input type="checkbox"/> ELPAC Criterion reports (CDE) (B2.3) <input type="checkbox"/> Reclassification Criteria for all applicable grade levels (within “Notes” section above) (B2.4) <input type="checkbox"/> Other: (Specify)

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

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

- Providing supports for At-Risk English Learners 2018-2019 (CDE)

Rubric		Sources of Evidence
Performance	<input checked="" type="checkbox"/> The school’s percentage of “At Risk” English Learners is at rate lower than the Resident Schools Median <input type="checkbox"/> The school’s percentage of “At Risk” English Learners is at a rate similar to the Resident Schools Median <input type="checkbox"/> The school’s percentage of “At Risk” English Learners is at a rate higher than the Resident Schools Median <input type="checkbox"/> The school’s percentage of “At Risk” English Learners is at a rate that is substantially higher than the Resident Schools Median <input type="checkbox"/> No assessment of performance for this indicator	<input type="checkbox"/> “At-Risk” by Grade report (CDE): 2018-2019 <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability’s Data Set (B2.1)



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

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> • Providing supports for Long Term English Learners 2018-2019 (CDE) 		
	Rubric	Sources of Evidence
Performance	<input checked="" type="checkbox"/> The school’s percentage of LTELs is at rate lower than the Resident Schools Median <input type="checkbox"/> The school’s percentage of LTELs is at a rate similar to the Resident Schools Median <input type="checkbox"/> The school’s percentage of LTELs is at a rate higher than the Resident Schools Median <input type="checkbox"/> The school’s percentage of LTELs is at a rate that is substantially higher than the Resident Schools Median <input type="checkbox"/> No assessment of performance for this indicator	<input type="checkbox"/> Long-Term English Learners (LTEL) by Grade report (CDE): 2018-2019 <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability’s Data Set (B2.1)

A8: FOUR-YEAR ADJUSTED COHORT GRADUATION RATE - STUDENT ACHIEVEMENT AND EDUCATIONAL PERFORMANCE QUALITY INDICATOR #8

<p><i>The school demonstrates student academic achievement, including progress towards closing the achievement gap, as measured by:</i></p> <ul style="list-style-type: none"> • Four-Year Adjusted Cohort Graduation Rate (CDE) (high schools only) 		
	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The school’s Four-Year Adjusted Cohort Graduation Rate is at a rate higher than Resident Schools Median <input type="checkbox"/> The school’s Four-Year Adjusted Cohort Graduation Rate is at a rate similar to the Resident Schools Median <input type="checkbox"/> The school’s Four-Year Adjusted Cohort Graduation Rate is at a rate lower than the Resident Schools Median <input type="checkbox"/> The school’s Four-Year Adjusted Cohort Graduation Rate is at a rate substantially lower than the Resident Schools Median <input checked="" type="checkbox"/> No assessment of performance for this indicator	<input type="checkbox"/> Four-Year Adjusted Cohort Graduation Rate (CDE) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability’s Data Set (B2.1) <input type="checkbox"/> Graduation Requirements (within “Notes” section above) (B2.5) <input type="checkbox"/> Other: (Specify) <hr/> A-G passing grade requirement (e.g. C or D) (CSD internal use only)



***INDICATOR A9 IS ONLY APPLICABLE TO NEW CHARTER SCHOOLS WHICH DO NOT HAVE CAASPP (SBAC) SCORES AND CHARTER SCHOOLS WHICH SERVE GRADE LEVELS K, 1, 2, 9, AND 10 (THE GRADE LEVELS WHICH ARE NOT ADMINISTERED THE CAASPP). Due to COVID-19, the school may be unable to provide accurate data for this indicator. If no data is available, a score will not be earned for this indicator and it will not impact the overall score for the Student Achievement and Educational Performance section.**

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

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

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

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

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The school has demonstrated accomplished levels of student achievement and progress as measured by school's internal assessments and other school data that are regularly monitored and analyzed and that reflect significant growth in student achievement in ELA and Math for all subgroups in all grade-levels <input type="checkbox"/> The school has demonstrated proficient levels of student achievement and progress as measured by school's internal assessments and other school data that are regularly monitored and analyzed and that reflect moderate growth in student achievement in ELA and Math for the majority of subgroups and grade-levels. <input type="checkbox"/> The school has demonstrated developing levels of student achievement and progress as measured by school's internal assessments and other school data that are regularly monitored and analyzed and that reflect limited growth in student achievement in ELA and Math for some subgroups and grade-levels <input type="checkbox"/> The school has demonstrated unsatisfactory levels of student achievement and progress as measured by school's internal assessments and other school data and that reflect no growth or a decline in student achievement in ELA and Math for the majority of subgroups and grade-levels, or the school has not collected and/or analyzed and monitored internal assessment or other academic achievement data. <input checked="" type="checkbox"/> No assessment of performance for this indicator.	<input type="checkbox"/> Internal academic performance and progress data and information (B2.2) <input type="checkbox"/> School Internal Assessment Data Report or equivalent (B2.6) <input type="checkbox"/> Other: (Specify)



CALIFORNIA SCHOOL DASHBOARD STATE INDICATORS

Summary of School Performance

Indicators A10 – A16 reflect the school’s ratings on the Dashboard. Indicators A10 – A16 will not impact the overall Student Achievement and Educational Performance Rating for 2019-2020 oversight but will provide informational areas of focus.

I. Academic Performance

A10: CAASPP ENGLISH LANGUAGE ARTS - Grades 3-5 Grades 6-8 Grade 11

Performance Level Color: Not Applicable

Change Level: Choose an item.

A11: CAASPP MATHEMATICS - Grades 3-5 Grades 6-8 Grade 11

Performance Level Color: Not Applicable

Change Level: Choose an item.

A12: ENGLISH LEARNER PROGRESS

Performance Level Color: Not Applicable

Change Level: Choose an item.

A13: COLLEGE/CAREER (high schools only)

Performance Level Color: Not Applicable

Change Level: Choose an item.

II. Academic Engagement

A14: CHRONIC ABSENTEEISM

Performance Level Color: Not Applicable

Change Level: Choose an item.

A15: GRADUATION RATE

Performance Level Color: Not Applicable

Change Level: Choose an item.

III. Conditions and Climate

A16: SUSPENSION RATE

Performance Level Color: Not Applicable

Change Level: Choose an item.



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Matrix for Success Academy

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 5/28/2020

NOTES:

The school is in its second year of operation and no data or performance color were displayed on the California Accountability System Dashboard.

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

N/A



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

Areas of Demonstrated Strength and/or Progress

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

The school has a well-developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety. Based on the binder review, the school provided the following evidence:

- The school has a Comprehensive Health, Safety, and Emergency Preparedness Plan, incident response procedures, emergency response team list that Duties and Responsibilities, Incident Command Center, School Site Crisis Team Chart, evacuation route maps for each room and floor, emergency supplies, and emergency drill records
- Visitor’s policy at the front of the entrance to the school, and inside the Parent-Student handbook
- Emergency drills conducted as follows: 8/14/2019 (Earthquake, Drop, Cover and Hold and Active shooter), 9/27/2019 (Earthquake, Drop, Cover and Hold and Active shooter), 10/17/2019 (California Shakeout, fire drill), 11/18/2019 (Earthquake, Drop, Cover and Hold and Active shooter), 12/18/2019 (Earthquake, Drop, Cover and Hold and Active shooter), 1/13/2020 (Fire), 1/21/2020 (Earthquake, Drop, Cover and Hold and Active shooter), 2/27/20 (Earthquake, Drop, Cover and Hold and Active shooter)
- Emergency drills training review – 7/5/19 and 7/12/2019
- School staff verified the provision and location of onsite emergency supplies
- Completion of a training course for Child Abuse, Blood Borne Pathogens and Epi-pen (11/22/2019, 11 staff members)
- Suicide Prevention Policy was adopted by the Governing Board in compliance with AB 2246, and is posted on the schools’ website

O3: STANDARDS–BASED INSTRUCTION

The school has substantially implemented grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS & CA NGSS. Based on the binder review and interviews with school leadership and teachers, the school provided the following evidence:

- CA CCSS aligned lessons plans and rubrics for ELA, Math, Social Studies, Science (NGSS), Physical education, and Foreign Language as part of the school’s Diploma Plus computer platform
- The school has created Standard- based rubrics that combine the cognitive process of the competency in conjunction with the standard
- WASC Initial Accreditation Status through June 30, 2012
- A-G high school courses have been approved through UC Doorway
- The school has implemented a system to monitor student progress toward completion of A-G and graduation requirements
- School has one to one Chromebooks

**O8: PROFESSIONAL DEVELOPMENT**

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. Based on the binder review and interviews with school leadership, the school provided the following evidence:

Professional development sessions (agendas and sign-in sheets):

- August 2, 2019 - DPNG engagement review
- August 9, 2019 SPED review, Welligent, DPNG review, enrollment process update, ADA monitoring process
- September 6, 2019 - Mandated reporter Training
- September 13, 2019 - Curriculum development, SPED update - IEP minutes, clarify DPNG resubmission process, review of success seminar tracking system, review of orientation process, discuss Mandatory Drills
- October 4, 2019 - Master agreement, SPED review - work reduction for IEP students
- October 11, 2019 - review roles and responsibilities for the School Safety Plan, Learner engagement, video reflection for DPNG
- February 14, 2020- counseling update, SPED update, DPNG platform update, tech issues procedures, course completion
- February 28, 2020 - Mandated reporting, Master agreements review, SPED update, mid-year review, training, and outside PD procedures

Areas Noted for Further Growth and/or Improvement**O2: HEALTH AND SAFETY**

The school has a partially developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety for Certificates of Occupancy, immunization, health screenings and emergency epi-pens. Although the school arranged health screenings, they were not scheduled until March 30-31, 2020, nine months after the start of the school year

4: MEETING THE NEEDS OF ALL STUDENTS; SUBGROUP 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 subgroups, and partially modifies instruction based on data analysis. Although the school has developed an internal data analysis system, review of Binder 3 provided limited evidence of the internal assessments data

O9: STAKEHOLDER COMMUNICATION AND INVOLVEMENT

The school has partially developed a stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns. Based on the binder review and interviews with school leadership, the school provided the following evidence:

- Although the established the Parent/Community Advisory Committee and English Learner Advisory Committee, Binder 3 provided limited evidence of regularly scheduled meetings
- The school is creating a parent portal through its online learning platform, DPNG
- The school utilizes Parent Square to communicate with parents



- Students' Success Seminar teachers regularly contact students and families, providing updates on student progress, assessment performance, and courses completed

Corrective Action Required

4: MEETING THE NEEDS OF ALL STUDENTS; SUBGROUP DATA ANALYSIS

On December 16, 2019, the Charter Schools Division issued Matrix for Success Charter, a Notice to Cure related to the school’s lack of compliance with Independent Study Program requirements set forth in the charter and applicable law. CSD staff have engaged in conversations and communications with Matrix for Success Academy staff on multiple occasions on this issue. At the time of issuing this report, the organization has responded to the Notice as requested, including performing an independent audit by Clifton Larson Allen LLP related to the average daily attendance ADA processes, records, and calculations for the school. The CSD through ongoing oversight will monitor the progress of compliance with this Notice, and the school’s progress in ensuring compliance with the school’s charter and applicable law pertaining to the Independent Studies Program and Master Agreements.

Notes:

O6: SPECIAL EDUCATION

In light of the COVID-19 outbreak, the school shared the following:

Students with disabilities have continued to be academically served in an online environment (DPNG). Learning accommodations were already in place within the DPNG platform prior to the pandemic closure, thus these accommodations continued in place within the distance learning structure. Special education specific services by third parties have continued to be delivered as well by the same vendors (DirectEd). IEPs have continued to be held through Google Meets or Zoom conferencing. Both schools have set up “learning schedules”, where Special Education staff “show up” to provide support academic support, just as they would in a traditional classroom. All minutes and services continue to be documented in Welligent and internally by the respective special education teams of each school.

Special education staff have been in contact with all students with IEPs since the closure. Special education staff is actively participating in LAUSD COP 3 and LACOE webinars and activities to stay informed with ever changing guidance and practices during this crisis.

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

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

The school has a system in place to ensure that:

- The school has a current site-specific comprehensive Health, Safety, and Emergency Plan



(Note: for co-locations, the charter school adheres and complies with the District school’s Health, Safety and Emergency Plan)

- The school is able and prepared to implement its emergency procedures in the event of a natural disaster or other emergency (includes threat assessment protocol)
- School staff and other mandated reporters working on behalf of the school receive timely training on child abuse awareness and reporting in accordance with the requirements of AB 1432
- School staff receives annual training on the handling of bloodborne pathogens
- The school has a Visitor’s policy and it’s visible in the main office
- A Pupil Suicide Prevention Policy (grades 7-12) is in place, in compliance with AB 2246

	Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <input type="checkbox"/> The school has a highly developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety <input checked="" type="checkbox"/> The school has a well-developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety <input type="checkbox"/> The school has a partially developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety <input type="checkbox"/> The school has a minimal or no system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10) <input checked="" type="checkbox"/> Comprehensive Health, Safety, and Emergency Plan (B3.1b) <input type="checkbox"/> Evacuation route maps (B3.1b) <input checked="" type="checkbox"/> Documentation of emergency drills and training (B3.1c) <input type="checkbox"/> Evidence of provision and location of onsite emergency supplies (B3.1b) <input checked="" type="checkbox"/> Evidence of AB 2246 implementation (grades 7-12) (B3.1f) <input checked="" type="checkbox"/> Child abuse mandated reporter training documentation (B3.1d and B3A.4) <input checked="" type="checkbox"/> Bloodborne pathogens training documentation (B3.1e and B3A.4) <input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2019-2020</i> (“ESSA Grid”) (B3A.1) <input type="checkbox"/> Site/classroom observation <input checked="" type="checkbox"/> Visitor’s Policy (B3.1a) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)

O2: HEALTH AND SAFETY - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #2

The school has a system in place to ensure that:

- For each school site, the school has a current site-specific Certificate of Occupancy or equivalent that authorizes the current use of the site
- School provides documentation of student immunization and



- School provides documentation of health screening per applicable law and terms of the charter (vision screenings upon school entry and every third year thereafter through grade 8 and hearing screenings are mandated in kindergarten/first grade and in second, fifth, eighth, tenth/eleventh grade and upon first school entry)
- School maintains an emergency epinephrine auto-injectors (“epi-pen”) onsite and has provided training to volunteer staff member(s) in the storage and emergency use of the epi-pen
- Per AB 1871, charter schools are required to provide needy students with one nutritionally adequate free or reduced priced meal each day
- Per AB 2009, any charter school that offers an interscholastic athletic program is required to have at least one automated external defibrillator (AED)

	Sources of Evidence
<p style="text-align: center;">Rubric</p> <p style="writing-mode: vertical-rl; transform: rotate(180deg);">Performance</p> <p><input type="checkbox"/> The school has a highly developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety for Certificates of Occupancy, immunization, health screenings and emergency epi-pens</p> <p><input type="checkbox"/> The school has a well-developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety for Certificates of Occupancy, immunization, health screenings and emergency epi-pens</p> <p><input checked="" type="checkbox"/> The school has a partially developed system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety for Certificates of Occupancy, immunization, health screenings and emergency epi-pens</p> <p><input type="checkbox"/> The school has a minimal or no system in place to ensure protection of student and staff health and safety, and compliance with applicable legal and charter requirements related to health and safety for Certificates of Occupancy, immunization, health screenings and emergency epi-pens</p>	<p><input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10)</p> <p><input checked="" type="checkbox"/> Certificate of Occupancy or equivalent (B3.2a)</p> <p><input checked="" type="checkbox"/> Evidence of student immunization (B3.2b)</p> <p><input checked="" type="checkbox"/> Evidence of health screening (B3.2b)</p> <p><input checked="" type="checkbox"/> Evidence of Epi-pen (B3.2c)</p> <p><input type="checkbox"/> AED (schools with an interscholastic athletic program) (B3.2e)</p> <p><input checked="" type="checkbox"/> Discussion with school leadership</p> <p><input type="checkbox"/> Other: (Specify)</p>



O3: STANDARDS-BASED INSTRUCTION - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #3

<p>The school has:</p> <ul style="list-style-type: none"> Implemented standards-based instruction schoolwide in accordance with the California academic content standards, including the California Common Core State Standards (CA CCSS), and the California Next Generation Science Standards (CA NGSS) that are applicable to the grade levels served Obtained WASC accreditation (high schools only) Implemented a system to monitor student progress toward and completion of graduation and A-G requirements (high schools only) Received UC/CSU approval of courses (UC Doorways) (high schools only) 		
	Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <input type="checkbox"/> The school has fully-implemented grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS & CA NGSS <input checked="" type="checkbox"/> The school has substantially implemented grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS & CA NGSS <input type="checkbox"/> The school has partially implemented grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS & CA NGSS <input type="checkbox"/> The school has minimally implemented, or not at all, grade-level-appropriate standards-based instruction in accordance with the California academic content standards, including the CA CCSS & CA NGSS 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Evidence of standards-based instructional program (B3.3a) <input checked="" type="checkbox"/> Evidence of implementation of CA NGSS (B3.3a) <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Evidence of technology readiness to administer CAASPP assessments (B3.3c) *new schools only <input checked="" type="checkbox"/> WASC documentation (B3.3d) <input checked="" type="checkbox"/> UC Doorways course approval documentation (B3.3e) <input type="checkbox"/> Evidence of implementation of Transitional Kindergarten (B3.3i) <input checked="" type="checkbox"/> Professional development documentation (B3.4b) <input type="checkbox"/> Classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)

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

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



Performance	<input type="checkbox"/> The school has fully implemented and monitors the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and modifies instruction based on data analysis <input type="checkbox"/> The school has substantially implemented and monitors the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and generally modifies instruction based on data analysis <input 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 subgroups, and partially modifies instruction based on data analysis <input type="checkbox"/> The school has minimally implemented, or not at all, the components of the charter's instructional program designed to meet the learning needs of all students, including its subgroups, and does not consistently modify instruction based on data analysis	<input checked="" type="checkbox"/> Evidence of standards-based instructional program (B3.3a) <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (B3.4b) <input checked="" type="checkbox"/> Evidence of intervention and support for all students, including but not limited to foster youth, at-risk students, and high performing students (B3.3j) <input checked="" type="checkbox"/> Implementation of the school's English Learner Master Plan (B3.3j) <input checked="" type="checkbox"/> Evidence of implementation of a data analysis system (B2.1 and B2.6) <input checked="" type="checkbox"/> School Internal Assessment Data Report, or equivalent (B2.6) <input type="checkbox"/> Classroom observation <input checked="" type="checkbox"/> Discussion with school leadership <input checked="" type="checkbox"/> Other: (Specify) – COVID-19 UPDATE – Distance Learning
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O5: IMPLEMENTATION OF KEY FEATURES OF EDUCATIONAL PROGRAM - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #5

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



O6: SPECIAL EDUCATION - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #6

Due to COVID-19, information regarding the Special Education program will be documented in the Notes section.

<p><i>The school has a system in place to ensure that the school:</i></p> <ul style="list-style-type: none"> ● Provides special education programs and services in accordance with students' IEPs and the terms of the Modified Consent Decree ● Provides special education training for staff in accordance with requirements of the Modified Consent Decree ● Conducts a special education self-review annually, using the Special Education Self-Review Checklist ● Maintains timely IEP timeline records and accurate service provision records in Welligent 		
	Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <input type="checkbox"/> The school has a highly developed system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements, including the Modified Consent Decree <input 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, including the Modified Consent Decree <input type="checkbox"/> The school has a partially developed system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements, including the Modified Consent Decree <input type="checkbox"/> The school has a minimal or no system in place for full implementation and monitoring of its special education processes and program in compliance with all requirements, including the Modified Consent Decree 	<ul style="list-style-type: none"> <input type="checkbox"/> Parent Student Handbook(s) (B1.10) <input type="checkbox"/> Professional development documentation (B3.4b) <input type="checkbox"/> Evidence of intervention and support for students with disabilities (B3.3j) <input type="checkbox"/> Self-Review Checklist (B3.4a) <input type="checkbox"/> Other special education documentation (B3.4a) <input type="checkbox"/> Consultation with Charter Operated Programs office <input type="checkbox"/> Welligent reports and/or other MCD documentation, including from the Division of Special Education (B3.4a) <input type="checkbox"/> Classroom observation <input type="checkbox"/> Discussion with school leadership <input checked="" type="checkbox"/> Other: (Specify)



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

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

- Align with the principles of the District's Discipline Foundation Policy and School Climate Bill of Rights Resolution, including but not limited to, tiered behavior intervention, alternatives to suspension, and schoolwide positive behavior support, data monitoring and, includes a discipline system complaint process
- Provide positive opportunities for student wellness, growth and success, aimed at making the school safe, welcoming, supportive and inclusive
- Minimize discretionary suspensions and expulsions
- Reduce or eliminate suspension disproportionality for student subgroups
- Per AB 2291, adopt on or before December 31, 2019, procedures for preventing acts of bullying, including cyberbullying

	Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <input type="checkbox"/> The school has a highly developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights <input checked="" type="checkbox"/> The school has a well-developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights <input type="checkbox"/> The school has a partially developed school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights <input type="checkbox"/> The school has a minimally developed or no school climate and student discipline system in place that is aligned with the principles of the Discipline Foundation Policy and School Climate Bill of Rights 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Parent-Student Handbook(s) (B1.10) <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (B3.4b) <input checked="" type="checkbox"/> Evidence of implementation of school climate and student discipline system that aligns with Discipline Foundation Policy and School Climate Bill of Rights principles (B3.4c) <input checked="" type="checkbox"/> Evidence of implementation of tiered behavior intervention, such as SST/COST (B3.4c) <input checked="" type="checkbox"/> Evidence of implementation of alternatives to suspension (B3.4c) <input checked="" type="checkbox"/> Evidence of implementation of schoolwide positive behavior support system (B3.4c) <input checked="" type="checkbox"/> Evidence of data monitoring (B3.4c) <input checked="" type="checkbox"/> Review of LAUSD Office of Data & Accountability's Data Set for suspension, expulsion, and disproportionality (B2.1) <input checked="" type="checkbox"/> Suspension rates, and disproportionality rates <input checked="" type="checkbox"/> Evidence of implementation of AB 2291 (B3.4c) <input type="checkbox"/> Interview of stakeholders <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



O8: PROFESSIONAL DEVELOPMENT - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #8

<p>The school:</p> <ul style="list-style-type: none"> • Has a schoolwide professional development plan for teachers and other staff that supports the educational program set forth in the charter and targets identified needs • Provides faculty and other instructional staff with professional development opportunities to improve instructional practice • Provides opportunities for teachers to collaborate regularly for the purpose of planning and improving curriculum and instruction 					
	<table border="1"> <thead> <tr> <th style="width: 50%; text-align: center;">Rubric</th> <th style="width: 50%; text-align: center;">Sources of Evidence</th> </tr> </thead> <tbody> <tr> <td style="vertical-align: top;"> <p>Performance</p> <ul style="list-style-type: none"> <input type="checkbox"/> The school has fully implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter <input checked="" type="checkbox"/> 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 </td> <td style="vertical-align: top;"> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (e.g. professional development calendar, agendas and sign-ins) (B3.4b) <input type="checkbox"/> Interview of teachers and/or other staff <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify) </td> </tr> </tbody> </table>	Rubric	Sources of Evidence	<p>Performance</p> <ul style="list-style-type: none"> <input type="checkbox"/> The school has fully implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter <input checked="" type="checkbox"/> The school has implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter <input type="checkbox"/> The school has partially implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter <input type="checkbox"/> The school has not implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (e.g. professional development calendar, agendas and sign-ins) (B3.4b) <input type="checkbox"/> Interview of teachers and/or other staff <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)
Rubric	Sources of Evidence				
<p>Performance</p> <ul style="list-style-type: none"> <input type="checkbox"/> The school has fully implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter <input checked="" type="checkbox"/> The school has implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter <input type="checkbox"/> The school has partially implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter <input type="checkbox"/> The school has not implemented a professional development plan for teachers and other staff that supports instructional practices, targets identified needs, and aligns with the education program set forth in the charter 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Professional development documentation (e.g. professional development calendar, agendas and sign-ins) (B3.4b) <input type="checkbox"/> Interview of teachers and/or other staff <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify) 				

O9: STAKEHOLDER COMMUNICATION AND INVOLVEMENT - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #9

<p>The school has a stakeholder communication system for gathering input, facilitating and encouraging involvement, sharing information, and resolving concerns, which:</p> <ul style="list-style-type: none"> • Engages in communication that notifies parents, teachers, pupils and other stakeholders of the process for resolving concerns, including how they may contact board members, and supports students, families, and other stakeholders in effectively resolving concerns • Provides all stakeholders with appropriate, accessible and relevant information about individual student and schoolwide academic progress and performance • Informs parents of high school students about transferability of courses to other public high schools and the eligibility of courses to meet college entrance requirements (high schools only) • 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 • Per AB 1104, schools that maintain any of grades 6-12, inclusive, to identify the most appropriate methods of informing parents and guardians of pupils in those grades of human trafficking prevention resources and to implement the identified methods by January 1, 2020
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	Rubric	Sources of Evidence
Performance	<ul style="list-style-type: none"> <input type="checkbox"/> The school has a highly developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns <input type="checkbox"/> The school has a well-developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns <input checked="" type="checkbox"/> The school has a partially developed stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns <input type="checkbox"/> The school has a minimal or no stakeholder communication system for gathering input, encouraging involvement, sharing information, and resolving concerns 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Parent-Student Handbook (B1.10) <input checked="" type="checkbox"/> LCAP (B3.3b) <input checked="" type="checkbox"/> Evidence of stakeholder consultation (B3.4d) <input checked="" type="checkbox"/> Evidence of parent/stakeholder involvement and engagement (B3.4d) <input checked="" type="checkbox"/> Evidence of sharing accessible and relevant information about individual student and schoolwide academic progress and performance with all stakeholders as appropriate (B3.4d) <input checked="" type="checkbox"/> Evidence that parents are informed about transferability of courses/course credit and eligibility to meet A-G requirements (B3.4d) <input checked="" type="checkbox"/> Evidence of provision of stakeholder access to school’s approved charter (B3.4d) <input checked="" type="checkbox"/> Evidence of communication to parents and other stakeholders of complaint resolution process(es) (B3.4d) <input checked="" type="checkbox"/> Evidence of informing parents/guardians of human trafficking prevention resources (January 1, 2020) grades 6-12 (B3.4d) <input type="checkbox"/> Interview of stakeholders <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)

O10: STAKEHOLDER COMMUNICATION AND TRANSPARENCY- ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #10

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

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



- Applicable categories described in Charter School Transparency Resolution
- Per AB 2022, 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

**required on website

Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The school has a highly developed communication system to share information with stakeholders, that is easily accessible via its documents available both manually, electronically and on its website <input checked="" type="checkbox"/> The school has a well-developed communication system to share information with stakeholders via its documents available both manually, electronically and on its website <input type="checkbox"/> The school has a partially developed communication system to share information with stakeholders via its documents available manually/electronically or on its website <input type="checkbox"/> The school has a minimally developed communication system to share information with stakeholders with limited to no availability of documents manually/electronically or on its website	<input checked="" type="checkbox"/> Review of the availability of information to the public/stakeholders (B3.4e) for: <ul style="list-style-type: none"> • UCP Procedure and Forms • Complaint Forms • SB 1375 Information • AB 2246 (grades 7-12) • LCAP • Financial Audit • Student Demographics • Student Achievement Information <input checked="" type="checkbox"/> Evidence of implementation of AB 2022 (B3.4e) <input type="checkbox"/> Other: (Specify)



O11: EVALUATION OF SCHOOL STAFF - ORGANIZATIONAL MANAGEMENT QUALITY INDICATOR #11

<p><i>The school has a system in place for the evaluation of school staff designed to ensure that:</i></p> <ul style="list-style-type: none"> the school’s educational program yields high student achievement the school complies with all applicable legal requirements 		
Rubric		Sources of Evidence
Performance	<input type="checkbox"/> The school has a highly developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input checked="" type="checkbox"/> The school has a well-developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input type="checkbox"/> The school has a partially developed system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements <input type="checkbox"/> The school has a minimal or no system in place for the evaluation of school staff designed to ensure that the school's educational program yields high student achievement and complies with all applicable legal requirements	<input checked="" type="checkbox"/> Documentation related to a system for evaluation of staff and administrator(s) (B3.4f) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)



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

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

- All certificated staff are fully credentialed, including EL authorizations, and appropriately assigned as authorized by their credentials at all times
- The school has obtained all necessary employee clearances, including criminal background and tuberculosis (TB) risk assessments/clearances, prior to employment, and keeps all clearances current
- The school has obtained all necessary vendor clearances, including criminal background and tuberculosis (TB) risk assessments/clearances, prior to the provision of service, and keeps all clearances current
- The school has conducted volunteer clearances in accordance with applicable law and policy, including criminal background clearances for all volunteers who perform schoolsite services while not under the direct supervision of a school employee, and tuberculosis (TB) risk assessments/clearances for all volunteers with frequent or prolonged contact with students

	Rubric	Sources of Evidence
Performance	<input type="checkbox"/> The school has fully implemented and continually monitors systems and procedures that maintain 100% compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements at all times <input checked="" type="checkbox"/> The school has implemented and monitors systems and procedures that maintain substantial compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements <input type="checkbox"/> The school has partially implemented and intermittently monitors systems and procedures to maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements <input type="checkbox"/> The school has not implemented and/or does not monitor systems and procedures to maintain compliance with applicable law, including but not limited to clearance, credentialing, and assignment requirements	<input checked="" type="checkbox"/> <i>Certification of Clearances, Credentialing, and Mandated Reporter Training 2019-2020</i> form (“ESSA Grid”) (B3A.1a) <input checked="" type="checkbox"/> Staff rosters and school master schedule (B3A.1b and B3A.1c) <input checked="" type="checkbox"/> Custodian(s) of Records documentation (B3A.1d) <input checked="" type="checkbox"/> Criminal Background Clearance Certifications (B3A.2a and B3A.3a) <input checked="" type="checkbox"/> Teaching credential/authorization documentation (B3A.2b) <input checked="" type="checkbox"/> Vendor certifications (B3A.5) <input type="checkbox"/> Volunteer (TB) risk assessment/clearance certification (B3A.6) <input checked="" type="checkbox"/> Discussion with school leadership <input type="checkbox"/> Other: (Specify)

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

N/A



2458 Matrix for Success Academy	2016-2017					2017-2018					2018-2019				
	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Cash and Cash Equivalents		0	0	0	0		0	0	0	0		0	80,117	5,210	5,210
Current Assets		0	0	0	0		0	0	0	0		0	217,368	318,143	272,765
Fixed and Other Assets		0	0	0	0		0	0	0	0		0	19,486	20,511	20,510
Total Assets		0	0	0	0		0	0	0	0		0	236,854	338,654	293,275
Deferred Outflow		0	0	0	0		0	0	0	0		0	0	0	0
Current Liabilities		0	0	0	0		0	0	0	0		0	844,902	848,615	803,237
Other Long Term Liabilities		0	0	0	0		0	0	0	0		0	0	0	0
Unfunded OPEB Liabilities/Deferred Inflow		0	0	0	0		0	0	0	0		0	0	0	0
Total Liabilities		0	0	0	0		0	0	0	0		0	844,902	848,615	803,237
Net Assets		0	0	0	0		0	0	0	0		(106,309)	(608,048)	(509,962)	(509,962)
Total Revenues	0	0	0	0	0	0	0	0	0	0	2,481,846	1,461,617	832,128	980,441	935,064
Total Expenditures	0	0	0	0	0	0	0	0	0	0	2,412,187	1,765,510	1,637,760	1,687,987	1,642,609
Net Income / (Loss)	0	0	0	0	0	0	0	0	0	0	69,659	(303,893)	(805,632)	(707,546)	(707,545)
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	0	0	0	0	0	0	0	0	0	0	69,659	(303,893)	(805,632)	(707,546)	(707,545)
Net Assets, Beginning	0	0	0	0	0	0	0	0	0	0	0	197,584	197,584	197,584	197,583
Adj. for restatement / Prior Yr Adj	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Net Assets, Beginning, Adjusted	0	0	0	0	0	0	0	0	0	0	0	197,584	197,584	197,584	197,583
Net Assets, End	0	0	0	0	0	0	0	0	0	0	69,659	(106,309)	(608,048)	(509,962)	(509,962)

2458 Matrix for Success Academy	Audited Financials					2019-2020				
	2015-16	2016-17	2017-18	2018-19	2019-20	Preliminary Budget	First Interim	Second Interim	Unaudited Actuals	Audited Financials
Cash and Cash Equivalents	0	0	0	5,210	0		63,428	8,674	0	0
Current Assets	0	0	0	272,765	0		601,562	612,355	0	0
Fixed and Other Assets	0	0	0	20,510	0		15,722	15,722	0	0
Total Assets	0	0	0	293,275	0		617,284	628,078	0	0
Deferred Outflow	0	0	0	0	0		0	0	0	0
Current Liabilities	0	0	0	803,237	0		950,885	895,042	0	0
Other Long Term Liabilities	0	0	0	0	0		13,862	(5,552)	0	0
Unfunded OPEB Liabilities/Deferred Inflow	0	0	0	0	0		0	0	0	0
Total Liabilities	0	0	0	803,237	0		964,747	889,490	0	0
Net Assets	0	0	0	(509,962)	0		(347,463)	(261,412)	0	0
Total Revenues	0	0	0	935,064	0	2,668,800	2,534,443	2,466,967	0	0
Total Expenditures	0	0	0	1,642,609	0	2,330,821	2,371,944	2,218,417	0	0
Net Income / (Loss)	0	0	0	(707,545)	0	337,979	162,499	248,549	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	0	0	0	(707,545)	0	337,979	162,499	248,549	0	0
Net Assets, Beginning	0	0	0	197,583	0	(608,048)	(509,962)	(509,962)	0	0
Adj. for restatement / Prior Yr Adj	0	0	0	0	0	16,740	0	0	0	0
Net Assets, Beginning, Adjusted	0	0	0	197,583	0	(591,308)	(509,962)	(509,962)	0	0
Net Assets, End	0	0	0	(509,962)	0	(253,329)	(347,463)	(261,412)	0	0



FISCAL OPERATIONS	RATING
<p>You have been assessed by the Fiscal Oversight team and you are receiving the rating of 2, Developing.</p> <p>Other circumstances and information could influence the rating and are noted in this evaluation.</p>	2
<p>MATRIX’s fiscal condition is negative. According to the 2018-2019 independent audit report, the school had negative net assets of (\$509,962) and a net loss of (\$707,545). The 2019-2020 Second Interim projects negative net assets of (\$261,412) and net income of \$248,549.</p> <p>PazLo Education Foundation (PazLo) operates two schools, namely, Academic Performance Excellence Academy (APEX), and Matrix for Success Academy (MATRIX). Both PazLo Education Foundation schools are authorized by the Los Angeles Unified School District (LAUSD) and both are overseen by the same governing board. The CSD was advised that neither of the schools pay management fees. The costs for some staff positions (e.g., Directors, Testing and Data Managers, the IT and Special Programs Assistant, the Human Resources/Operations Manager, etc.) are allocated based upon the amount of work they perform at each school and the allocation percentages between the two schools may vary. Some costs (e.g., fees related to the schools’ back office services provider firm, CharterSAFE general insurance, audits, and general legal services) are shared/allocated on a pro-rated basis and calculated based on the Average Daily Attendance (ADA) for each of the two PazLo Education Foundation schools. As such, the allocation percentages may vary from year to year, depending on the ADA for each PazLo Education Foundation school.</p>	
<p>Areas of Demonstrated Strength and/or Progress:</p> <p>No significant items noted.</p>	
<p>Areas Noted for Further Growth and/or Improvement:</p> <p>Through conducting fiscal oversight and analyzing the data below, the CSD requests and receives fiscal documents from MATRIX (including bank statements, bank reconciliations, 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 check transactions across these PazLo charter schools, to assess overall compliance with PazLo’s Fiscal Policies & Procedures. Any areas noted for further growth and/or improvement relating to PazLo’s and its charter schools’ overall compliance to the aforementioned manual 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 related to the fiscal condition and/or the segregation of duties reviews are school-specific and reviewed separately for each PazLo charter school.</p> <p>1. Financial Condition: 2018-2019 was the school’s first year of operation. According to the school’s 2018-2019 independent audit report, the school’s fiscal condition was negative. The school’s 2019-2020 Second Interim projects negative net assets of (\$261,412) and net income of \$248,549, which was an improvement over the Fiscal Year 2018-2019 loss of (\$707,545). This improvement was primarily due to increased student enrollment during Fiscal Year 2019-2020 (from 15 students in 2018-2019, to 183 students* in 2019-2020, per the Norm Enrollment the school reported to LAUSD). * The 2018-2019 Norm Enrollment reported to LAUSD was subsequently determined to be overstated, due to the school’s inaccurate reporting resulting from discrepancies with its Master Agreements, Learning Logs, and work samples. See the Corrective Action section</p>	



under Governance and Organizational Management, Programs, and Operations above for further details regarding the Notice to Cure issued by the CSD on December 16, 2019 and actions taken by MATRIX to correct these issues and address the CSD’s concerns. As part of MATRIX’s corrected action, an external audit firm (Clifton Larson Allen LLP [CLA]) was contracted to perform the Average Daily Attendance (ADA) reporting documentation validation review for all of MATRIX’s students who attended via independent study during the period from 7/1/2019 through 11/29/2019. CLA’s review report dated May 29, 2020 identified 1,403 ineligible attendance days due to discrepancies with the school’s Master Agreements, Learning Logs, and work samples. The CSD was advised that these ineligible attendance days represent between 3% - 6 % of the total ADA reported by the school. As a result, a \$128K reduction in Local Control Funding Formula (LCFF) revenues would be accounted for in Fiscal Year 2019-2020. On or around June 11, 2020, the school’s back office services provider firm (ExED) submitted revised classification and statistical reports for affected attendance/learning periods to LAUSD’s Attendance & Enrollment Division (and provided copies of these reports to the CSD). Per the CSD’s review, MATRIX’s revised 2019-2020 classification and statistical reports reflected P2 enrollment of 222 students, which is higher than the Norm Enrollment of 183 students reported by the school.

	2015-2016 (Audited Actuals)	2016-2017 (Audited Actuals)	2017-2018 (Audited Actuals)	2018-2019 (Audited Actuals)	2019-2020 (Second Interim)
Net Assets	N/A	N/A	N/A	(\$509,962)	(\$261,412)
Net Income/Loss	N/A	N/A	N/A	(\$707,505)	\$248,549
Transfers In/Out	N/A	N/A	N/A	\$0	\$0
Prior Year Adjustment(s)	N/A	N/A	N/A	\$0	\$0

MATRIX’s Co-Director informed the CSD that recruiting efforts have continued as normal, with the exception of school visits and presentations due to COVID-19 school closures. According to MATRIX, Site Coordinators and the Counselors have continued their outreach to LAUSD schools in the area targeting their non-graduates and MIA (missing in action) students with a lot of success. Moreover, MATRIX declared that it has over 40 students lined up to start in the next school year (2020-2021), and that it expects enrollment to pick up toward the end of July 2020 as flyer distribution increases in the area above.

Based on the CSD’s observations at MATRIX’s governing board meeting on June 16, 2020, and its revised budget/cash flow projections submitted to the CSD in June 2020 (i.e., the school’s revised May 2020 budget), the school projects to achieve net income of \$157K, with a positive cash balance of \$90K (which represents a 4% cash reserve) at the end of Fiscal Year 2019-2020. Based on the CSD’s review of the school’s 2019-2020 cash flow actuals and per MATRIX, as of the date of this report, MATRIX has paid off the outstanding balance



for the sale of receivables to the factoring company during the month of May 2020 (in the amount of \$100,714). See Item 8 in the Notes section for further details regarding MATRIX’s factoring arrangement and intraorganizational borrowing from APEX.

Further, MATRIX’s 2020-2021 budget provided to the CSD projects the enrollment of 240 students and ADA of 183.22%, with net income of \$45K and a positive cash balance of \$53K (which represents a 2.4% cash reserve), without factoring its receivables.

2. Lack of Written Guidelines:

a. Procurement Procedures:

During the CSD’s 2019-2020 fiscal oversight review, the CSD noted that the school’s fiscal policies and procedures lacked written guidelines regarding procurements. This is a recurring issue cited in the school’s 2018-2019 Annual Performance-Based Oversight Visit Report. Based on the CSD’s review of a sample of the school’s checks and supporting documentation, the CSD noted that, while the school did have competitive bidding processes in place for its food vendors and maintained appropriate documentation to support these purchases, the school’s processes in this area were not addressed within the school’s governing board-approved fiscal policies and procedures.

The CSD recommends that the school’s governing board establish written policies and procedures aligning its procurement processes with the school’s practices, including the policies pertaining to competitive bidding thresholds, processes for the procurement of goods and services, criteria for vendor selection, adequate segregation of duties for procurements to mitigate the risk of fraud and abuse, and adequate retention periods for contract/bidding records.

b. Interschool Transfers and Borrowing:

Based on the CSD’s 2019-2020 review of PazLo’s governing board meeting minutes dated June 25, 2019, the CSD noted that the PazLo’s governing board reviewed and approved the resolution allowing intraorganizational borrowing between APEX Academy and MATRIX for Success Academy, to be repaid within five years either in equal installments or via a lump sum (at 0% interest). However, based on the CSD’s review of PazLo’s current fiscal policies and procedures, the CSD noted that these policies and procedures lacked written guidance regarding PazLo’s “Interschool Transfer and Loan Policy,” including the specific procedures and documentation requirements pertaining to requests and approvals of PazLo’s interschool loans, such as: (1) The name of the party making the transfer request; (2) The purpose of the request; (3) The required documents prior to submission for approvals; (4) The name(s) and position/title(s) of the parties who review and authorize the transfer; and, (5) The governing board-approved meeting minutes.

The CSD recommends that the school’s governing board incorporate the aforementioned “Interschool Transfer and Loan Policy” into its fiscal policies and procedures, including written guidelines requiring intraorganizational loan agreements for intraorganizational receivables and payables that are not settled or netted to zero balances as of the end of the fiscal year, with terms that include a reasonable interest rate, monthly or quarterly payments, and specific repayment schedules. Further, in doing so, the organization should also refer to the “Related Organizations and Intraorganizational Loans” guidelines provided in the 2017 Fiscal Crisis & Management Assistance Team (FCMAT) California Charter School Accounting and Best Practices Manual (the FCMAT Manual), which the CSD shared with PazLo’s Co-Director during the CSD’s oversight visit on February 14, 2020.



In response to the CSD’s observations above, PazLo’s Co- Director indicated that he would include the CSD’s recommendations above in the agenda for its May 2020 governing board meeting, specifically the observations pertaining to revisions of the school’s fiscal policies and procedures including: (1) Procurement Procedures, and (2) Interschool Transfer and Loan Policy. Based on the CSD’s review of PazLo’s governing board meeting agenda dated May 19, 2020, the CSD noted that these items were included for the PazLo governing board’s review and approval. Per PazLo’s Co-Director, its governing board reviewed, discussed, and approved these items at its May 19, 2020 meeting, and the May 19, 2020 meeting minutes were scheduled to be approved at PazLo’s next June 16, 2020 governing board meeting.

3. Late Payments to Vendors:

Based on the CSD’s review of the school’s check register for the period spanning from January 1, 2019 through January 1, 2020, a sample of 34 checks and 21 bank transactions were selected for further review. The CSD noted four checks that were issued late. Two of these checks referenced late fees and/or interest charges (i.e., Check #'s 300937 and 301009). Further details regarding these checks are provided below.

Item #	Check #	Check Issuance Date	Invoice Due Date	Payee	Check Amount	Transaction Description
1	300937	11/8/2019	7/31/2019	School Pathways LLC	\$27.13	Late Interest Charge
2	300978	12/20/2019	11/7/2019	CDW Government	\$612.84	Keyboard
3	300905	10/3/2019	7/31/2019	Parentsquare, Inc.	\$2,025.00	FY19-20 - Parentsquare Annual Subscription
4	301009	1/24/2020	12/7/2019	Spectrum Services	\$316.59	Internet Services

In response to the CSD’s observations above, PazLo’s Co-Director explained: “Due to cash flow management[,] we have had to hold payments on invoices. We will make every attempt to release such bills as soon as cash flows are available.”

The CSD recommends that the school continue to track all recurring and non-recurring invoices and billing statements and ensure that all vendors are paid timely, to prevent the school from incurring additional late fees and/or interest charges in the future.

4. Lack of Dual Signatures for Checks Over \$10,000:

Based on the CSD’s review of sample check disbursements, the CSD noted one item with a check amount over \$10K that lacked a second signature (Check #301045, in the amount of \$16,591.89, dated 3/13/2020 and made payable to DirectED). The copy of the canceled check provided to the CSD reflected only the signature from PazLo’s Co-Director. However, the electronic approval documentation furnished to the CSD revealed that the PazLo Board Treasurer had approved the expenditure in the online approval system (SpendBridge).



<p>Page 5 of PazLo’s fiscal policies and procedures states: “The Director and Board Treasurer will co-approve checks in excess of \$10,000 for all non-recurring items. All checks less than \$10,000 require only the signature of the School Director. All checks greater than \$10,000 require two approving signatures.”</p> <p>In response to the CSD’s observation above, the representative of the school’s back office services provider firm (ExED) stated: “[T]his was an oversight [on the part of the ExED team], where the check was not stamped with the 2nd signature. Currently, only one individual at ExED stamps checks with the signature stamps. Given that no checkbooks are available at the school site, thus no checks can be generated at the school site, [and] it doesn't really make sense to have the dual signature requirement. In speaking with the E[xecutive] D[irector], we have decided to revise the current fiscal policy language by removing the dual signature approval and adding a statement similar to: All non-budgeted, non-recurring invoices over \$10,000 will require the approval of the director and a member of the board. We plan to review and update the PazLo fiscal policies with the governing board at an upcoming board meeting.”</p> <p>The governing board and leadership team of the charter school are responsible for managing the operations of the school. Thus, the CSD’s recommendations and the school’s action plans concerning the above-noted findings and observations should be discussed at MATRIX’s next governing board meeting, but, in any event, no later than 90 days following the school’s receipt of this report. After the school’s next board meeting, it is the school’s responsibility to provide the CSD with its approved board meeting minutes regarding its action plans/steps, and/or proof of implementation of the mitigating actions taken by the school. The CSD will continue to monitor these issues through oversight.</p>	
<p>Other Observations (Items described in this section, while not addressed in the charter school’s Fiscal Policies and Procedures, are recommended for improvement to align with optimal business practices).</p> <p>None noted.</p>	
<p>Corrective Action Required:</p> <p>None noted that require immediate action to remedy concerns noted in this report.</p>	

**Notes:**

1. Reviewed independent audit report for the fiscal year ended June 30, 2019 and noted the following:
 - a. Audit opinion: Unmodified
 - b. Material weaknesses: None Reported
 - c. Deficiencies/Findings: None Reported
2. Reviewed bank statements and bank reconciliations from July 2018 through December 2018. Selected the months of July 2018 through December 2018 for sample testing. No discrepancies were noted.
 - a. Pacific Western Bank Checking Account Ending in X6046 (Associated Student Body Account) – Account Closed November 1, 2019
 - b. Pacific Western Bank Checking Account Ending in X6053 (Former Operating Account) – Account Closed October 31, 2019
 - c. Hanmi Bank Checking Account Ending in X4717 (Main Operating Account)
3. Reviewed the following 34 checks and 21 bank transactions. Discrepancies were noted under Areas Noted for Further Growth and/or Improvement above.
 - a. Check numbers: 300603, 300624, 300647, 300758, 300784, 300808, 300847, 300874, 300875, 300897, 300905, 300918, 300923, 300937, 300955, 300963, 300975, 300978, 300992, 300993, 300996, 301000, 301003, 301009, 301012, 3001017, 301022, 301023, 301030, 301045, 301067, 301069, 301070, and 301073.
 - b. Debit/Credit Transactions [transaction dates and amounts] (Hanmi Bank Operating Account Ending in X4717): (1) 6/28/2019 - **(\$10,662.98)**; (2) 6/28/2019 - **(\$48,778.76)**; (3) 6/25/2019 - **(\$63.89)**; (4) 7/12/2019 - \$326.05; (5) 9/19/2019 - \$1,252.23; (6) 9/25/2019 - \$84,000; (7) 10/1/2019 - **(\$10.00)**; (8) 10/1/2019 - **(\$16,360.96)**; (9) 10/4/2019 - \$1,096.06; (10) 10/11/2019 - \$15,364.32; (11) 10/15/2019 - **(\$57.36)**; (12) 10/23/2019 - \$60,000.00; (13) 11/6/2019 - \$140,997; (14) 11/8/2019 - \$10,668.12; (15) 11/15/2019 - **(\$78.32)**; (16) 11/15/2019 - \$2,062.57 (17) 12/5/2019 - \$3,724.74; (18) 12/20/2019 - \$300,000.00; (19) 1/14/2020 - **(\$2,911.87)**; (20) 1/28/2020 - **(\$9.00)**; and (21) 2/4/2020 - \$24,569.23.
4. Per the 2018-2019 audit report, the school's cash and cash equivalents is \$5,210, and total expenditures equal \$1,642,609. Therefore, the school's cash reserve level is 0.32%, which is below the recommended 5%.
5. A copy of the charter school's organizational chart, which depicts the current reporting structure of the charter school, including but not limited to, any board member or school employee with responsibilities outlined within the charter school's financial policies and procedures was provided.
6. A Segregation of Duties (SOD) review was conducted remotely with APEX (via videoconference). No discrepancies were noted.
7. An itemized accounting regarding total compensation paid to all executives, school leaders, administrators, directors, and non-certificated staff either employed directly by the school or the entity managing the charter school, including the organization's home office, charter management organization, or related entities which may have decision-making authority over the school was provided.
8. PazLo disclosed that both the PazLo schools have been factoring their receivables. PazLo's 2018-2019 independent audit report (Note 9) disclosed that APEX entered into a factoring agreement with CAM. The amount of factored governmental accounts receivable was \$350,000 and the school paid a discount fee of 3% in 2018-2019. APEX's outstanding loan amount was \$360,269 as of June 30, 2019, and \$33,254.64 as of the date of this report, respectively. Based on the documentation furnished to the CSD, the amounts of factored governmental accounts receivable for MATRIX were \$102,700.50 and \$97,299.50, and the school paid discount fees of 2.19% and 3.39%, respectively, in 2019-2020. As of the date of this report, MATRIX's outstanding loan amount was \$0. According to PazLo's June 18, 2019 meeting minutes, the purpose of these factoring agreements is "to allow the organization to meet cash flow issues stemming from the significantly low enrollment at MATRIX for Success Academy during the 2018-2019 school year." PazLo also shared that, since Fiscal Year 2018-2019, its schools have engaged in intraorganizational borrowing. As of the date of this report, MATRIX owes APEX approximately \$634K. Moreover, PazLo was recently awarded a Paycheck Protection Program (PPP) Loan in the amount of \$860,331 from the U.S. Small Business Administration. As per PazLo's Co-Director, PazLo received PPP loan proceeds of \$860,331 on April 27, 2020. PazLo provided the CSD with its June 18, 2019 governing



board meeting minutes approving the resolution to initiate the sale of APEX’s and MATRIX’s receivables with Charter Asset Management (CAM). PazLo also provided the CSD with documentation regarding the intraorganizational borrowing referenced above.

9. Pursuant to AB 1871, a signed written statement that indicates that MATRIX is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each school day was provided.
10. MATRIX did not disclose any legal actions, regulatory proceedings, or investigations which might have a material impact on their financial viability.
11. Governing board meeting minutes reflecting the presentation of financial reports, such as balance sheets, income statements, and cash flow statements were provided.
12. Governing board meeting minutes reflecting the adoption of the 2019-2020 budget were provided.
13. Governing board meeting minutes reflecting the receipt, review, and approval of interim financial reports submitted to LAUSD were provided.
14. Governing board meeting minutes reflecting the selection of the current independent auditor were provided.
15. Governing board meeting minutes reflecting the approval of the current fiscal policies and procedures were provided.
16. Governing board meeting minutes reflecting the receipt, review, and discussion of the most current Annual Performance-Based Oversight Visit report were provided.
17. Governing board meeting minutes reflecting the discussion of the most current independent audit report were provided.
18. Evidence of MATRIX offering STRS, PERS, and/or Social Security benefits to its employees and proof of payment was provided.
19. Equipment inventory was provided.
20. The 2019-2020 LCAP was submitted to LAUSD.
21. The most current LCAP is posted on the charter school’s website.
22. The Education Protection Account (EPA) allocation and expenditures are posted on the charter school’s website.
23. The most current Audited Financial Statements are posted on the charter school’s website.
24. The 2018-2019 audited and unaudited actuals nearly mirror each other.

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

N/A



Fiscal Operations Rubrics

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

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

<p><i>An existing school that meets all of the required criteria and four of the Supplemental Criteria listed below would be assessed eligible to be considered as Accomplished.</i></p>	<p><i>An existing school that meets all of the required criteria and three of the Supplemental Criteria listed below would be assessed eligible to be considered as Proficient.</i></p>
<p><u>Existing Schools (based on the most current annual audit):</u> An existing school is one that has at least one annual independent audit on file with the Charter Schools Division</p> <p style="text-align: center;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. Net Assets are positive in the prior two audits; 2. The cash balance at the beginning of the school year is positive; 3. The two most current audits show no material weaknesses, deficiencies and/or findings; 4. All vendors and staff are paid in a timely manner; 5. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term; 6. Charter school adheres to the governing board approved Fiscal Policies and Procedures; 7. Governing board adopts the annual budget; 8. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 9. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 10. There is no apparent conflict of interest; 11. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each schoolday (except as provided for a charter school that offers nonclassroom-based instruction) is provided (pursuant to AB 1871); 12. The EPA allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP are posted on the charter school’s website; 13. The LCAP is submitted to the appropriate agencies; 	<p><u>Existing Schools (based on the most current annual audit):</u> An existing school is one that has at least one annual independent audit on file with the Charter Schools Division</p> <p style="text-align: center;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. Net Assets are positive in the most current audit; 2. The cash balance at the beginning of the school year is positive; 3. The most current audit shows no material weaknesses, deficiencies and/or findings; 4. Vendors and staff are paid in a timely manner; 5. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term; 6. Charter school generally adheres to the governing board-approved Fiscal Policies and Procedures; 7. Governing board adopts the annual budget; 8. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD; 9. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD; 10. There is no apparent conflict of interest; 11. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each schoolday (except as provided for a charter school that offers nonclassroom-based instruction) is provided (pursuant to AB 1871); 12. The EPA allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP are posted on the charter school’s website; 13. The LCAP is submitted to the appropriate agencies;



<p><i>An existing school that meets all of the required criteria and four of the Supplemental Criteria listed below would be assessed eligible to be considered as Accomplished.</i></p>	<p><i>An existing school that meets all of the required criteria and three of the Supplemental Criteria listed below would be assessed eligible to be considered as Proficient.</i></p>
<ul style="list-style-type: none"> 14. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals; 15. Requests for information made by the Charter Schools Division and LAUSD are processed by the charter school in a timely manner; 16. There are no discrepancies cited in the Areas Noted for Further Growth and/or Improvement; 17. Audited and unaudited actuals nearly mirror each other; 18. Proper segregations of duties are in place; and 19. If applicable, all LAUSD Board of Education-approved fiscal benchmark(s) are met based on the required deadline(s). 	<ul style="list-style-type: none"> 14. The charter school has knowledge of any material differences amongst the preliminary budget, first interim, second interim, unaudited actuals, and audited actuals; 15. Requests for information made by the Charter Schools Division and LAUSD are processed by the charter school in a timely manner; 16. There are no significant recurring issues; and 17. Audited and unaudited actuals nearly mirror each other.
<p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>	<p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>
<p style="text-align: center;"><u>SUPPLEMENTAL CRITERIA</u></p> <ul style="list-style-type: none"> 1. Positive Net Assets exceed 4% of prior year expenditures; 2. The cash balance at the beginning of the school year is at least 5% of the prior year expenses; 3. A comprehensive website that provides at a minimum six of the following fiscal items: <ul style="list-style-type: none"> ○ Most current financial reports presented to the governing board ○ Employee handbook ○ Student handbook ○ Salary schedules/benefits/information ○ Budget development process ○ Governing board member information (e.g., name, contact information, position on the governing board, term expiration) and meeting dates, time, and location ○ The most current approved petition ○ Administration/school contact ○ School calendar ○ Enrollment policies and procedures ○ Fiscal policies and procedures manual 	<p style="text-align: center;"><u>SUPPLEMENTAL CRITERIA</u></p> <ul style="list-style-type: none"> 1. Positive Net Assets exceed 3% of prior year expenditures; 2. The cash balance at the beginning of the school year is at least 4% of the prior year expenses; 3. A comprehensive website that provides at a minimum six of the following fiscal items: <ul style="list-style-type: none"> ○ Most current financial reports presented to the governing board ○ Employee handbook ○ Student handbook ○ Salaries schedule/benefits/information ○ Budget development process ○ Governing board member information (e.g., name, contact information, position on the governing board, term expiration) and meeting dates, time, and location ○ The most current approved petition ○ Administration/school contact ○ School calendar ○ Enrollment policies and procedures ○ Fiscal policies and procedures manual



<p><i>An existing school that meets all of the required criteria and four of the Supplemental Criteria listed below would be assessed eligible to be considered as Accomplished.</i></p>	<p><i>An existing school that meets all of the required criteria and three of the Supplemental Criteria listed below would be assessed eligible to be considered as Proficient.</i></p>
<p>4. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; and</p> <p>5. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting.</p> <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>	<p>4. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract; and</p> <p>5. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting.</p> <p><u>Note:</u> Other circumstances and information could influence the rating and will be noted in the evaluation.</p>

<p><i>An existing school that meets all of the Required criteria and six of the supplemental criteria listed below would be assessed eligible to be considered as Developing.</i></p>	<p><i>An existing school would be assessed as Unsatisfactory based on the statements below:</i></p>
<p><u>Existing Schools (based on the most current audit):</u> An existing school is one that has at least one annual independent audit on file with the Charter Schools Division</p> <p style="text-align: center;"><u>REQUIRED CRITERIA</u></p> <ol style="list-style-type: none"> 1. Net Assets are positive, or net assets are negative with strong trend toward positive (be positive at the end of the third year, per applicable audit, and beyond); 2. The cash balance at the beginning of the school year is positive; 3. Vendors and staff are paid in a timely manner; 4. Governing board approves Fiscal Policies and Procedures, at a minimum, every five years to correspond to the charter term; 5. Governing board adopts the annual budget; 6. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each schoolday (except as provided for a charter school that offers nonclassroom-based instruction is provided (pursuant to AB 1871)); 7. The EPA allocation and expenditures, the most current Audited Financial Statements, and the most current governing board-approved LCAP are posted on the charter school’s website; 	<p><u>Existing Schools (based on the most current audit):</u> An existing school is one that has at least one annual independent audit on file with the Charter Schools Division</p> <p>A charter school is assessed as Unsatisfactory if the charter school does not meet the criteria for Developing. The charter school was given a certain period of time to address the fiscal concerns of LAUSD, but failed to provide a satisfactory response. Continued operation of a charter school that is assessed as Unsatisfactory may result to non-implementation of instructional programs as provided in the petition. The charter school also has shown no immediate source of revenue to maintain a viable budget, nor has provided a feasible financial plan to mitigate the negative fiscal condition. The charter school’s governing board members lack fiscal capacity.</p>



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

- 8. The LCAP is submitted to the appropriate agencies;
- 9. Have an audit conducted annually by an independent auditing firm; and
- 10. Governing board discusses and resolves audit exceptions and deficiencies to the satisfaction of LAUSD.

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

SUPPLEMENTAL CRITERIA

- 1. Enrollment is stable or changing at a manageable rate (Enrollment changes are reflected in annual budget and facilities);
- 2. Governing board selects independent audit firm, acceptable if the independent audit firm is under a multi-year contract;
- 3. Fiscal reports (e.g., balance sheet, income statement, budget to actuals, cash flow statement, etc.) are presented to the governing board at each regular governing board meeting;
- 4. Governing board receives and reviews reports (e.g., preliminary budget, first interim, second interim, unaudited actuals, audited actuals, etc.) submitted to LAUSD;
- 5. Current audit shows no material weaknesses, deficiencies and/or findings;
- 6. Charter school adheres to the governing board approved Fiscal Policies and Procedures;
- 7. There is no apparent conflict of interest; and
- 8. Governing board approves any amendment(s) to the charter school's budget.

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

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

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



A new school that meets all of the Required criteria listed below would be assessed eligible to be considered as Developing.

A new school would be assessed as Unsatisfactory based on the statements below:

New Schools:

New Schools:

REQUIRED CRITERIA

1. A new school is one that does not have an independent audit on file with the Charter Schools Division;
2. The cash balance at the beginning of the school year is positive;
3. If enrollment is below the funding survey, the charter school has made significant adjustments in their operations to allow for the reduced income, and submitted a revised three-year budget and three-year cash flow statement;
4. Projected debt is managed efficiently and will not cause the charter school to end the fiscal year with negative net assets. The non-profit organization is financially viable to support the charter school;
5. Interim reports and unaudited actuals project:
 - a. Positive net assets
 - b. Expenses less than revenues
 - c. Projected expenses and revenues have no significant variance from budget
6. As a practice, the governing board receives and reviews the charter school's financial reports as evidenced by the governing board meeting minutes;
7. A signed written statement which indicates that the charter school is providing each needy pupil with one nutritionally adequate free or reduced-price meal during each schoolday (except as provided for a charter school that offers nonclassroom-based instruction) is provided (pursuant to AB 1871);
8. The most current governing board-approved LCAP are posted on the charter school's website; and
9. The LCAP is submitted to the appropriate agencies.

A charter school is assessed as Unsatisfactory if the charter school does not meet the criteria for Developing. A charter school was given a certain period of time to address the fiscal concerns of LAUSD, but failed to provide satisfactory response. Continued operation of a charter school that is assessed as Unsatisfactory may result to non-implementation of instructional programs as provided in the petition. The charter school also has shown no immediate source of revenue to maintain a viable budget, nor has provided a feasible financial plan to mitigate the negative fiscal condition. The charter school's governing board members lack fiscal capacity.

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

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



LAUSD CHARTER SCHOOLS DIVISION

SCHOOL NAME: Matrix for Success Academy

Annual Performance-Based Oversight Visit Report

DATE OF VISIT: 5/28/2020

A new school that meets all of the Required criteria listed below would be assessed eligible to be considered as Developing.

A new school would be assessed as Unsatisfactory based on the statements below:

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

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