

Innovations Academy Board Retreat Agenda: 10/17/24 @ 11:00 am

Meeting location(s)

Innovations Academy 5454 Ruffin Rd San Diego, CA 92123	636 Hillsborough St, Oakland, CA 94606	Public call in number 425- 436-6381* Access code 1637013
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*Members of the public need not state their names when entering the conference call. Call-in number is provided as a convenience to the public.

Board Attendance

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Others in Attendance

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Agenda

Topic	Minutes
➤ Call to order / roll call	Time / Date Board in Attendance: 1. Other Present: 1.
➤ Approval of current agenda	Vote to approve current agenda - 1st motion - 2nd motion- Vote:
➤ Approval of prior month meeting minutes Sept 2024	Vote to approve past minutes - 1st motion- 2nd motion- Vote:
➤ Public comments (3 mins per person)	
➤ Action Item Innovations is in need of outreach, promotion and marketing. There will be a review of 4 marketing proposals as well as review of a marketing survey done with current parents. Marketing Proposal Review and Action 12:00 Joey Dusina with SABA 12:20 Ryan Eldridge with GrowSchools	Discussion Action Item Discussion: ➤ Vote: ➤ 1st motion - ➤ 2nd motion -

<p>12:40 Chuck/Larry with KreativeWebworks 1:05 Susan Speiser with Niche</p>	
<p>Updates (Christine) (see board packet)</p> <ul style="list-style-type: none"> ● Middle School Redesign ● Enrollment ● Attendance ● Audit Finding: Report of our 23-24 audit and the finding due to missing children’s signatures on IS master agreements. ● Charter Renewal 25-26 ● LCAP Goals Review ● New application/lottery/enrollment system information ● 23-24 District Site Visit Report, review ● 24-25 District Site Visit, November 19th at 1 pm., We need two board members for this year’s site visit 	
<p>Discussion Items for Board Retreat</p> <ul style="list-style-type: none"> ● Brown Act/training scheduling 24-25 year and submittal of any certificates ● Update on board meeting laws ● Discuss acquisition of new board members. Create actions that the board can take to acquire 2 or more board members. ● Discussion board terms (reminder) ● Board Roles, the board will discuss any possible changes to board roles ● Strategize possible restructure prior to director succession or charter renewal <p>Action Items</p> <ul style="list-style-type: none"> ● Create board calendar ● Director Contract review ● CSMC Charter contract 	
<p>➤ Action Update of Comp School Safety Plan New requirements established last year set forth that the board approve a safety plan for the subsequent academic year by March and review the plan in October of the following school year. This is the “review and update as</p>	

needed”	
● Next board meeting	
○ Confirm date of next meeting	
○ Identify agenda items for next meeting	➤
Meeting adjourned	

The foregoing minutes were approved by the Board of Directors of Innovations Academy on _____.

Secretary

Please contact Innovations Academy Board @ Board@InnovationsAcademy.org if you require special assistance or a listening device to attend the Board Meeting. Requests must be made 48 hours in advance.

1. TELECONFERENCE MEETINGS. Members of the Board of Directors may participate in teleconference meetings so long as all of the following requirements in the Brown Act are complied with:
 - At a minimum, a quorum of the members of the Board of Directors shall participate in the teleconference meeting from locations within the boundaries of the State of California;
 - All votes taken during a teleconference meeting shall be by roll call;
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 - All locations where a member of the Board of Directors constituting the quorum participates in a meeting via teleconference must be fully accessible to members of the public and shall be listed on the agenda;
 - Members of the public must be able to hear what is said during the meeting and shall be provided with an opportunity to address the Board of Directors directly at each teleconference location; and
 - The agenda shall indicate that members of the public attending a meeting conducted via teleconference need not give their name when entering the conference call.
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Innovations Academy Board Minutes: 9/10/24 @ 6:00 pm

Meeting location(s)

Innovations Academy 5454 Ruffin Rd San Diego, CA 92123	636 Hillsborough St, Oakland, CA 94606	Public call in number 425- 436-6381* Access code 1637013
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Board Attendance

Jennifer Williams	Stephen Rosen	Julia Stoer	Danielle Strachman (telephone)			
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Others in Attendance

Christine Kuglen (Director)	Joshua Eng (Business Manager)					
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Agenda

Topic	Minutes
➤ Call to order / roll call	Time / Date call to order 6 pm Roll Call Attendance: Stephen, Julia, Jennifer, Danielle
➤ Approval of current agenda	Vote to approve current agenda - 1st motion made to approve the current agenda - Jennifer 2nd motion- Stephen Roll Call Vote: Aye: Stephen, Jennifer, Julia, Danielle No: 0 Abstain: 0
➤ Approval of prior month meeting minutes Approval of minutes 5/28/24 Approval of minutes 6/25/24	Vote to approve past minutes - Julia noted that the minutes for 5/28 have the wrong date in the signature spot and will need to be changed Jennifer had a question about attendance. Should she be listed in the attendance when she arrived late. The board decided to add Jennifer since she was present. Motion was made to approve the previous minutes predicated on the two changes above made by Danielle 2nd motion- Julia Roll Call Vote: Aye: Stephen, Jennifer, Danielle, Julia No: 0 Abstain: 0
➤ Public comments (3 mins per person)	The floor was opened for public comments but none were made
Financial Action Items	Vote to approve Unaudited Actuals -

<ul style="list-style-type: none"> ● 23-24 Unaudited Actuals Approval <p>Unaudited actuals are annual financial reports that show a school's financial activities and position for a fiscal year. The data in these reports is not yet formally audited. Charters, districts and county offices of education submit their financial data to the California Department of Education (CDE) in a uniform format.</p>	<p>Josh asked board to turn to page 16/53 to give a financial summary of the 23-24 school year. The process for unaudited actuals was explained (we send to district, district to county, county to state and then auditors audit). Josh reviewed page 19/53-the school finished with a loss for the year was \$89875.00, which was significantly less than expected. In comparison with where we thought it would be at a loss of \$400K. Lottery and special ed rates were increased which accounted for some of that, savings for some of that.</p> <p>Ending fund balance which is like our reserves \$3,923,233.91.</p> <p>Jen asks about noncapitalized equipment. Josh shared that this includes small items that are more pricey but not so high to be capitalized.</p> <p>Jen asked if insurance should be approved by the board. Christine said it has never been approved. Stephen mentioned that coverage has been looked at and Josh said that he has seen it done but does not know if it is common practice.</p> <p>Jen asked if it is a legal requirement for a charter to keep the majority of funds in the county treasury? Josh- No legal requirement. The reason we do this is that the interest rate is higher.</p> <p>Danielle asked if there is a way we can better determine ahead of time the amount of loss since it was a bit of a scare. Josh- reiterated that most of the recovery was unpredictable as we didn't know that the savings Lottery and special ed funds would increase.</p> <p>A discussion ensued regarding the use of IA funds and how to balance savings.</p> <p>Motion made to approve the unaudited actuals by Stephen 2nd motion- Jennifer</p> <p>Roll Call Vote: Aye: Stephen, Jennifer, Julia, Danielle No: 0 Abstain 0</p>
<p>Policy Action Items</p> <ul style="list-style-type: none"> ● Transportation Policy <p>This policy is regarding the transportation of any special</p>	<p>Christine explained that we have a student who is placed in a NPS who requested transportation. We realized it would be a good idea to have a policy so the SELPA was engaged to provide information, guidance and a template. Our legal</p>

<p>education students attending a nonpublic school placement</p>	<p>team reviewed the policy presented. Vote Motion to approve this transportation policy made by Jennifer 2nd motion- Stephen Roll Call Vote: Aye: Stephen, Jennifer, Julia Danielle No: 0 Abstain: 0</p>
<p>Biennial Review, Conflict of Interest Code The biennial review of a conflict of interest code is a review that state and local government agencies in California must perform at least every other year to ensure their codes are accurate and current. The review helps ensure that the code reflects the agency's current structure and that officials who make or participate in government decisions are required to disclose their financial interests. Due Oct 1 (see board packet)</p>	<p>Christine explained that the biennial review is conducted on even years for Innovations Academy. Nothing has changed with our status as a nonprofit or with the categories that our reporting members report under.</p>
<p>Action and Discussion Item</p> <ul style="list-style-type: none"> ● Progress on marketing <p>Christine will share progress on marketing plan with possible guests for presentation. This is an action item in case the board decides to make it an action item.</p>	<p><u>Item – Director Update</u> The expected presentation did not take place. The decision was made to bring it to the board retreat</p> <p>The board asked for some input on how parents heard about our school. Christine agreed to put out a survey. The board asked about how we can get analytics of DMV ads and SDFamily magazine, two venues we are currently using to market. NO vote was taken on this item.</p>
<p>➤ Next board meeting</p>	
<ul style="list-style-type: none"> ○ Confirm date of next meeting (board retreat) 	<p>Oct 17 @11am- approx 2 pm</p>
<ul style="list-style-type: none"> ○ Identify agenda items for next meeting 	<p>Enrollment (possibly calling weeks ahead to get a touchpoint with new families)</p> <p>Board Retreat Scheduling and Items: Review board responsibilities Brown Act brief review Update on board meeting laws Set board calendar Discuss acquisition of new board members</p>

	Director succession Review/Update Fiscal Policy and other policies Marketing Insurance Director Contract
Meeting adjourned	Stephen adjourns at 6:58 pm

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Board of Directors of Innovations Academy
on _____.

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Online Marketing Proposal for Innovations Academy

Saba Inc. Thanks You For the Opportunity to
Join Your Team

09 / 25 / 2024

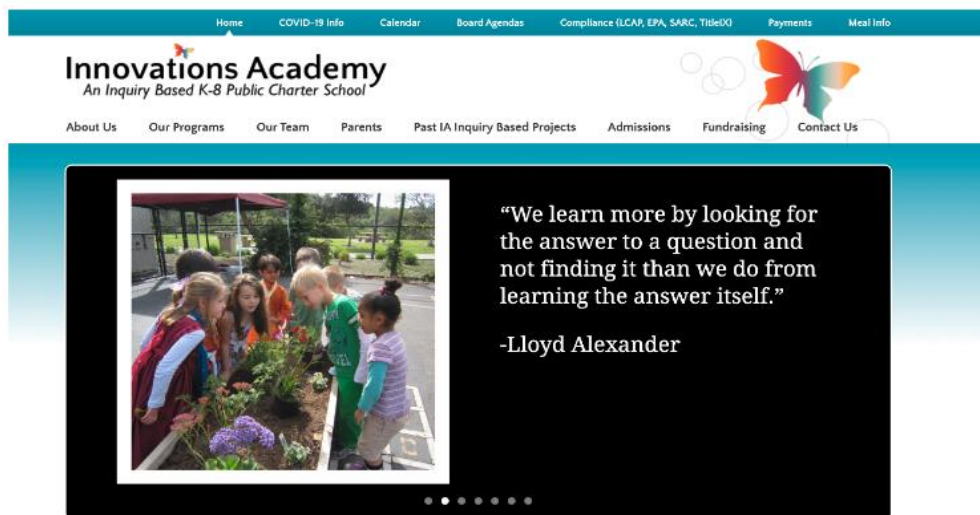
Joey Dusina
joey@sabaseo.com
858-277-1717



PROJECT OVERVIEW

Client Information	Location
Innovations Academy Christine Kuglen	https://innovationsacademy.org/ christine@innovationsacademy.org

CURRENT WEBSITE HOMEPAGE



PROJECT DESCRIPTION - CRAWL - WALK - RUN

Phase I Project (Crawl) Deliverables will Focus on:

Foundation: Website Googlicious & Local Seo/Map Listings

Phase II Project (Walk):

Google Ads, Banner Ads

Phase III Project (Run)

To Be Determined Based on Marketing Data

PROJECT SERVICES

Service Description	One Time Fee	Monthly Fee
<p>New Wordpress Website Development/SEO Optimization Custom designed, SEO ready website focused on your industry specific needs built on the secure and versatile WordPress framework. SEO Structure, Enhance Code (Header Tags and Meta Tags, Photo Compression, Maximize Page Speed and Create Social Media Linkage. Payments in 1/3 increments: Contract, start of Coding, and Final Acceptance.</p>	\$4,500 to \$7,500	
<p>Current Customer Website / On-Page SEO Optimization Make your Website Googlicious Enhance your online presence based on your Googlicious report. Fixes include: SEO Structure, Enhance Code, Photo Compression, Increase Pagespeed and Create Social Media Linkage.</p>	\$1,500	
Search Engine Optimization		
<p>Ongoing Search Engine Optimization (SEO) Monthly keyword search terms reviewed, website pages optimized, 4-6 blog posts written and posted to current blog (website), link building program (backlinks) National</p>		Internationally \$2,500 Nationally \$1500
Google AdWords		
<p>Google AdWords PPC (Pay Per Click) Management Perform Comprehensive Keyword Research and Selection, Use of Proper Keyword Categorization, Matching Options and Ad Group Development, Write Effective Ad Copy Recommended Google Spend \$1,500 to \$2,000 Call Tracking is a method used to track the sources of your phone calls and subsequent conversions. Call tracking allows to Link the number of incoming calls to the efficiency of an advertising channel. Make accurate calculations of ROI for marketing campaigns and use for training for those answering your phone calls.</p>		\$950
Campaign Creation & Set Up	\$790	
Social Media		
<p>Local SEO - Google My Business/Map Listings With a Google My Business account, you get more than a business listing; also Google Search and Maps. Saba will create and manage over 100+ citations, including Two Blogs a month. 1. Be consistent with your name and address. 2. Use a local phone number. 3. Include your tracked and main number. 4. Keep your hours updated. 5. Write a business description. 6. Properly categorize your business</p>		\$795

<p>Social Media PPC Management Monthly Pay Per Click Management for Ads On The Most Relevant Social Media Platforms: Facebook, Instagram, Twitter, Pinterest, LinkedIn, YouTube Recommended PPC Spend \$500 to \$1,000</p>		\$600
Campaign Creation & Set Up	\$590	
<p>Yelp Ads In Addition to Google, presence on Yelp Ads can bolster lead generation opportunities. Yelp can bring additional lead opportunities. Recommended PPC Spend \$300 to \$725</p>		\$450
<p>On-going Social Media Content Management Creation and customization of: Google My Business , Facebook, Instagram LinkedIn. Creative Content, Posted 1 Time Per Week Per Platform. 16 Posts per month</p>		\$1,500
Campaign Creation & Set Up	\$1,200	
<p>Press Release 1 per month, writing and submission</p>		\$500
Remarketing		
<p>Search Retargeting Management Target previous visitors who left your site without converting. it enables you to target users at the top of the purchase funnel, it allows you to instantly build custom audience segments based on user-intent. (i.e abandoned shopping cart)</p>		\$500
Campaign Creation & Set Up	\$500	
<p>Prospect Management By targeting digital profiles similar to those of your existing customers, prospecting automates new customer acquisition. Also called look-alike audiences, similar audiences, or audience modeling, prospecting is the first step in a full-funnel marketing strategy.including prospects not familiar with your brand, but has searched or visited services within a competitor's site</p>		\$500
Campaign Creation & Set Up	\$500	
<p>Custom Affinity & Intent Audiences This allows us to follow people who have visited your competitor's websites or any websites that we feel cater to similar audiences as you do. For this channel, we use banner display ads. This is extremely powerful from a digital presence perspective as it puts you in front of people who are in the market. The avg. cost per click is roughly .10 - .40 cents. Recommended PPC Spend \$300 to \$400</p>		\$450
Campaign Creation & Set Up	\$650	

<p>Facebook Retargeting Management</p> <p>Retargeting is a form of online advertising that brings back website visitors who haven't converted on their first visit to an online store. ... The cookie lets you recognize and follow your store's visitors when they visits other sites, and displays ads to these people</p>		\$500
<p>Campaign Creation & Set Up</p>	\$500	
Customer Retention		
<p>Customer Contact Email Marketing</p> <p>Email marketing strategy is an important part of any marketing strategy. Email is the most cost-effective way to promote your products, communicate with your customers and reach your business goals. marketing (up to 2 per month), Press Release (1 per month), Newsletter (1 per month)</p>		\$1,500
<p>Campaign Creation & Set Up</p>	\$850	
Reputation Management		
<p>Yelp and Google My Business</p> <p>Manage Your Online Reputation & Remove Personal Information From The Internet. Influence Consumers. Improve Word-of-Mouth. Boost Online Endorsements. Develop Online Confidence. Target unfavorable reviews to attempt to change and/or eliminate, including writing responses for all reviews.</p>		\$1,350
<p>Campaign Creation & Set Up Campaign</p>	\$245	
Maintenance and Security		
<p>Secured Hosting, Analytics Dashboard, Maintenance</p> <p>Https (SSL certificate) maintained hosting, 99.9% uptime, weekly system backups, regular security audits, performance marketing and analytic reporting dashboard, <i>1 hour of content updates included.</i></p>		\$150
<p>Digital Dashboard</p> <p>A digital dashboard is an information management tool that is used to track KPIs, metrics, and other key data points relevant to your business</p>		No Charge
Service Totals		
	One Time Fee	Monthly Fee
	\$0	\$0
Package Discount's		
	One Time Fee	Monthly Fee

Quotes

Prices valid for 30 days from date on your quote. Pricing is subject to change.

**Grwx
Schools**

Kids to Fill Your School

Enrollment Marketing Partnership

Innovations Academy

October 2024



**Grōw
Schools**

Filling Your School—Key to Surviving and Thriving

Enrollment Marketing Partnership



Filling Schools is More Difficult Than Ever

- Plenty of choices and few kids.
- Increased competition in the face of demographic and geographic shifts.
- Hard to get a compelling story in front of families in a cluttered environment.
- Limited resources / expertise to consistently deliver kids.



**Grow
Schools**

Helping You Get Where You're Going

Enrollment Marketing Partnership



A Vision and a Purpose

All kids have access to a
nourishing school environment
where they can flourish.



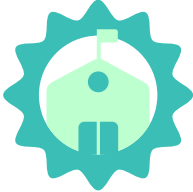
A Shared Mission

We help others get where they are going.

For school leaders, that means getting you the money, resources, and know-how to create thriving schools.



How We Support You



Money to
run your school



Money to
buy your school



Kids to
fill your school



Kids to Fill Your School



- Kids to attend the first day of school.
- Partner on the path to thriving classrooms.
- A partnership that aligns to increase and steady your school's enrollment.

How can we help fill your school?



- What has proved successful in the past?
- What does enrollment success look like going forward?

**Grōw
Schools**

A Partnership to Fill Your School

Enrollment Marketing Partnership



We Get to Know Your School's Story and Voice

Story Arcs Help Build Your Brand

Example: Growing Great Kids

We create good citizens.

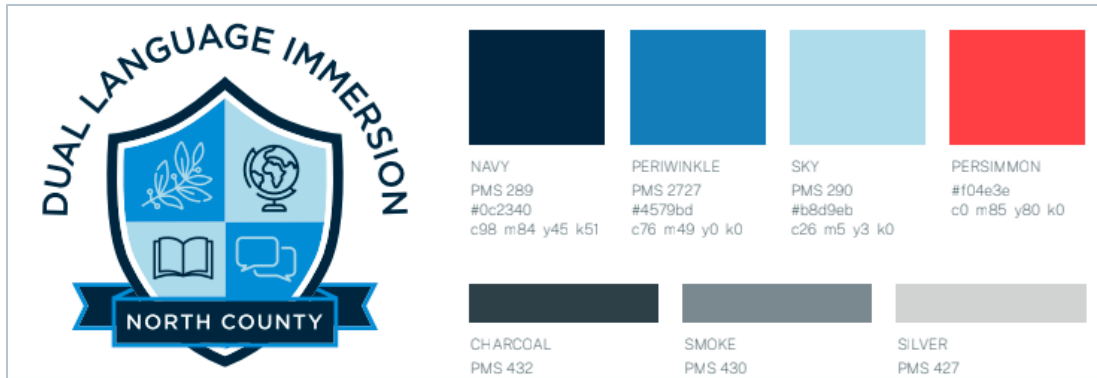
We cultivate our students' development and creativity. Since we are a small school we can affirm, stretch and celebrate every child's uniqueness and every child's individuality – together.

We figure out what makes each child tick – and then tenderly, attentively support our students on their personal, robust academic journey, helping them become the best versions of themselves.

We honor the unique in every child.

Digital / Ground Game Campaigns

Use Story Arcs to Drive Interest



4/27/22

More Than Just Another Language: Immersion Education

You may already be aware that Dual Language Immersion North County (DLINC) is a tuition-free public school that offers academically excellent

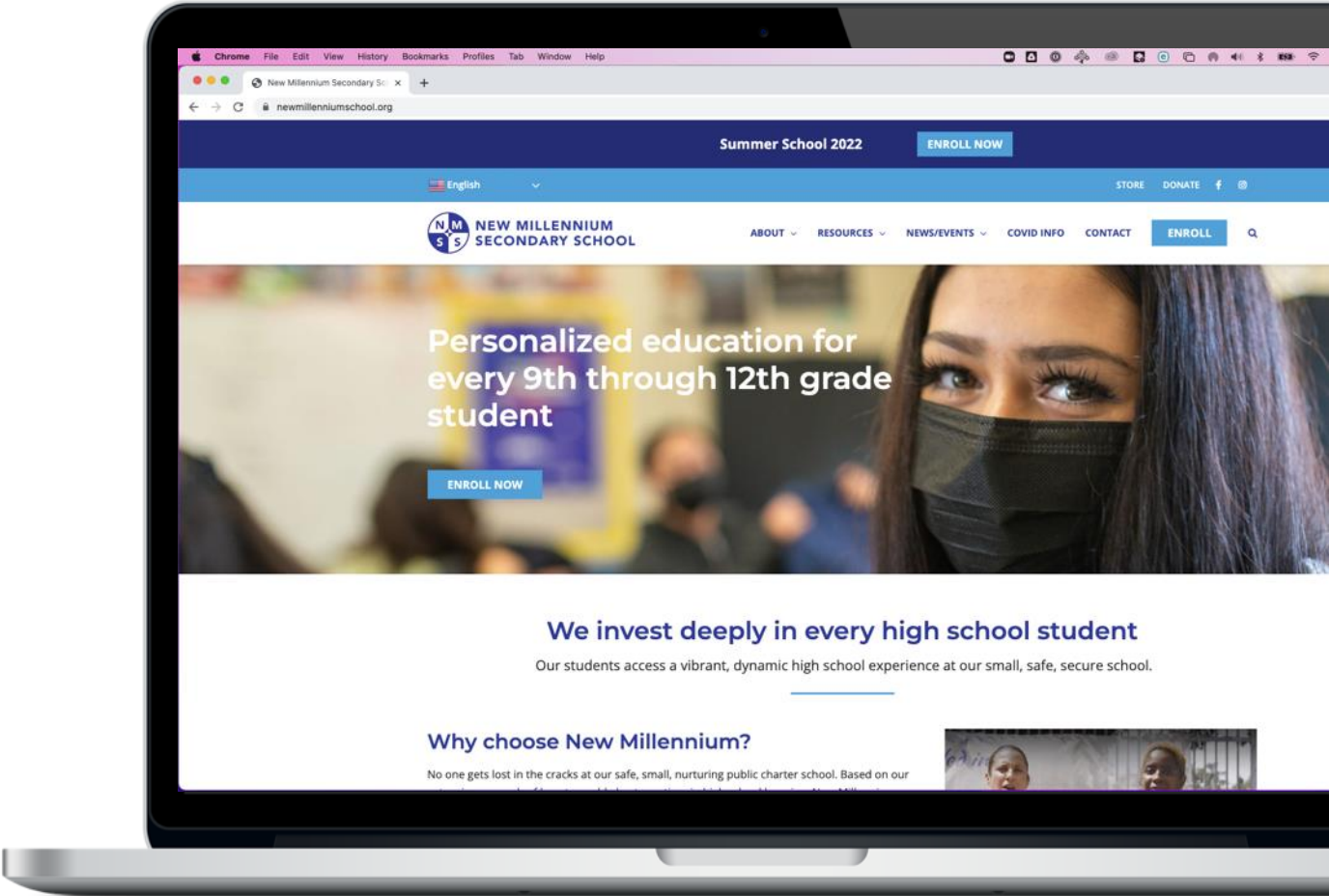


8/29/22

Beyond the Classroom

Dual Language Immersion North County is a TK-8 tuition-free charter school that is building tomorrow's leaders in an increasingly multilingual world. We do this through an innovative immersion curriculum in Spanish and English. But bilingual education is only

Interest Engaged Through Website Experience



Interest Driven Through Enrollment Funnel

How It Works

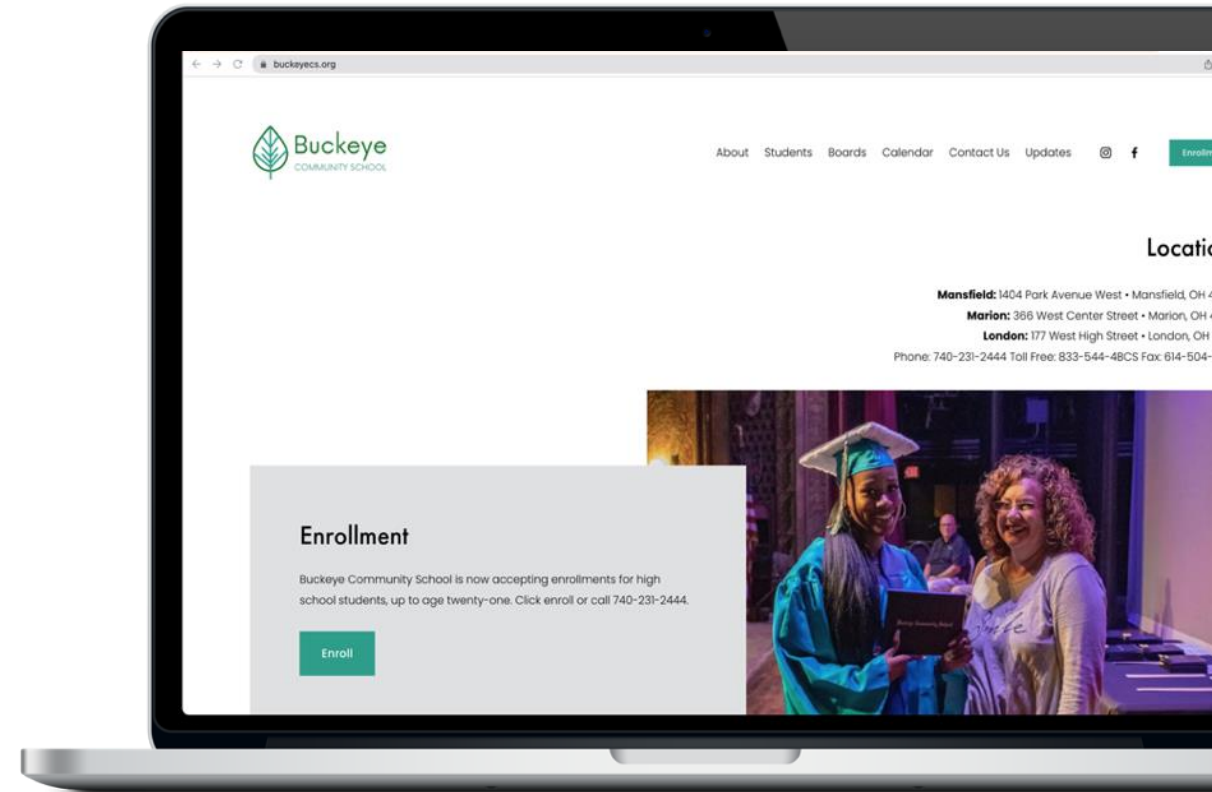


Driven by Integrated Marketing Campaigns

Activity	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9
GROW SCHOOLS	Story Arcs	Active	Light	Light	Light	Light	Light	Light	Light
	Planning	Active	Light	Light	Light	Light	Light	Light	Light
	Paid Media	Light	Active	Active	Active	Active	Active	Active	Active
	Social Media	Light	Active	Active	Active	Active	Active	Active	Active
	Print Assets	Light	Active	Active	Active	Light	Light	Light	Light
	Reporting	Light	Light	Light	Light	Light	Light	Light	Light
Innovations	Open Houses	Light	Active	Active	Active	Active	Active	Light	Light
	Community Events	Light	Active	Active	Active	Active	Active	Active	Light
	Registrations	Light	Light	Light	Light	Light	Active	Active	Light
	Integration	Light	Light	Light	Light	Light	Active	Active	Light
	School Starts	Light	Light	Light	Light	Light	Active	Active	Light

Kids for a School's First School Year

- **Challenge:** Buckeye Community Schools were new, opening in a rural community.
- **Path:** Partnered to get the word out to the community, highlighting the unique model offered to the community.
- **Destination:** Helped open two brand new schools and added more than 300 kids to their schools last year.



Brand Work That Coverts Interest

Buckeye COMMUNITY SCHOOL

Cheat Sheet Brand Guidelines

LOGO
Our logo is a core brand signal that identifies our brand. It must be applied with consistency to develop a visual bond with our brand identity.

Please do not redraw, rescale, or otherwise modify or add any other graphic elements to the trademark.

FULL COLOR
[Logo]

REVERSE ON DARK BACKGROUND
[Logo]

AVATARS
[Three leaf icons]

COLORS
The primary **Buckeye Green**, is supported by neutral and accent colors.

PRIMARY AND SUPPORTING COLORS

Buckeye Green HEX #008080 RGB 00, 128, 128 CMYK 100, 50, 50, 0	Dark Emerald HEX #006666 RGB 00, 102, 102 CMYK 100, 50, 50, 10	Dark Teal HEX #004D4D RGB 00, 77, 77 CMYK 100, 50, 50, 40
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NEUTRAL COLORS FOR BACKGROUNDS & TEXT (uses of tints for the greys are acceptable as needed)

White HEX #FFFFFF RGB 255, 255, 255 CMYK 0, 0, 0, 0	Light Stone Grey HEX #BDBDBD RGB 189, 189, 189 CMYK 0, 0, 0, 15	Stone Grey HEX #9E9E9E RGB 158, 158, 158 CMYK 0, 0, 0, 30	Charcoal HEX #696969 RGB 105, 105, 105 CMYK 0, 0, 0, 50
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ACCENT COLORS TO USE SPARINGLY IN SPECIAL CIRCUMSTANCES

Deep Eggplant HEX #483D8B RGB 72, 61, 139 CMYK 40, 30, 30, 30	Bright Coral HEX #FF4500 RGB 255, 69, 0 CMYK 0, 100, 50, 30	Goldenrod Yellow HEX #FFD700 RGB 255, 215, 0 CMYK 0, 0, 100, 30
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TYPOGRAPHY
For headlines and copy use **Avenir**. In cases where Avenir is not available, you can use **Poppins** as an alternate. Use **Francesca** sparingly as an accent typeface as needed.

THE BCS BRAND FEELS:
Welcoming
Friendly, open, inclusive
Down-to-earth
Practical, Authentic, Humble
Confident
Passionate, spirited, dynamic
Progressive
Imaginative, flexible, modern
Simple
Efficient, clean, direct

DESIGN PRINCIPLES
Favor lighter colors over dark backgrounds

Choose open, airy, and flexible imagery over ones that may feel constrained, restricted, or boxed in

Balance details and technical content with big picture vision and inspiration

Buckeye COMMUNITY SCHOOL

It's YOUR Future

We make diplomas happen.

(833) 544-4BCS
buckeyecs.org

COMING THIS FALL - ENROLLING NOW

Buckeye Community School
September 9

Welcome to your future! It's the first day of school at Buckeye today, but you can enroll with us any time of year and we'll help you get to graduation. <https://www.buckeyecs.org/how-enrolling>

Buckeye COMMUNITY SCHOOL

Welcome To YOUR FUTURE

www.buckeyecs.org

Buckeye COMMUNITY SCHOOL

About Students Boards Calendar Contact Us Updates

7/6/22
Everyone's Graduating. What About Me?
There are many reasons to not graduate at the same time as your peers. If you are a high school student who is feeling left behind as you watch other students graduate, we see you. We understand the challenges that become barriers to high school graduation, and

6/29/22
Join a School That Supports All Aspects of Life
BCS is a different kind of high school, one that supports you in all aspects of your life. Come to Buckeye and we will work together so that you can earn your high school diploma on your time, in your way.

6/22/22
You Deserve an Education
We meet you where you're at and help you achieve your dreams! Buckeye Community School believes that every student deserves an education. We work with each unique student to craft a learning plan and help them overcome obstacles and earn their high school diploma.

Expert Resources Guide

School Marketing Campaigns



CONTENT STRATEGISTS

Writers create meaningful enrollment marketing content for our charter schools including story arcs, social media posts, blogs, digital ads, boilerplates, and taglines. This content drives critical enrollment and retention strategies for your school.



PROJECT MANAGERS

Project managers are your primary point person and the “glue” between our school leaders and our Writers, Designers, Paid Media, Technical Team, and Vendors.



IMPLEMENTATION

Our Implementation Team often operates behind the scenes but is no less critical in helping you execute successful programs and campaigns. This team includes talented Designers and Website Developers, and experts in Paid Media, SEO / Analytics, Marketing, and Social Media.

Campaigns Fill Schools with Kids

More Kids Support Mission, Build Revenue

**15%
Increase**

Average Net Enrollment
Increase

100% Growth

Several Schools Doubled
Their Enrollment

\$750,000

Average Incremental
Revenue Per School From
Net Enrollment Increases

Structure and Timeline Aligned Around Kids in School

Flexible Campaigns
Delivered to Meet
Your Needs

- Kickoff in November (or sooner)
- Partnership arrangement aligned to fill your school
 - Blended: Fixed fee + Amount per enrolled student over baseline
 - Fixed Fee: Monthly fee

Partnership That Empowers School Into Future



Always Enabling
Your Success

- All our work together is yours to keep.
- No proprietary technology or accounts are withheld—everything created is done with secure logins inside your owned channels.
- You get ongoing access to everything—story arcs, branding, digital and ground game campaigns, creative and graphic design files, website logins, etc.

**Grow
Schools**

Results That Fill Your School

Enrollment Marketing Partnership



15% Average Net Enrollment Increases



5 Years

First client started on
May 1, 2018.



89 Schools

Hundreds of offline and online
campaigns developed for
schools.



16 States

Schools from coast to
coast—urban and rural.

5,000 net new kids attracted through the doors.

Success Across a Diverse Set of Schools

New Schools

Filled Catalyst Academy Charter School's Kindergarten Class and increased enrollment by 83%.

Rural Schools

Buckeye Community Schools grew by 400 students across three campuses.

Urban Schools

El Paso Leadership Academy grew from 72 to 423 kids, a 487% increase

Mature Schools

Tucson's oldest charter school, EDGE High School, stabilized enrollment declines and grew by 14%.

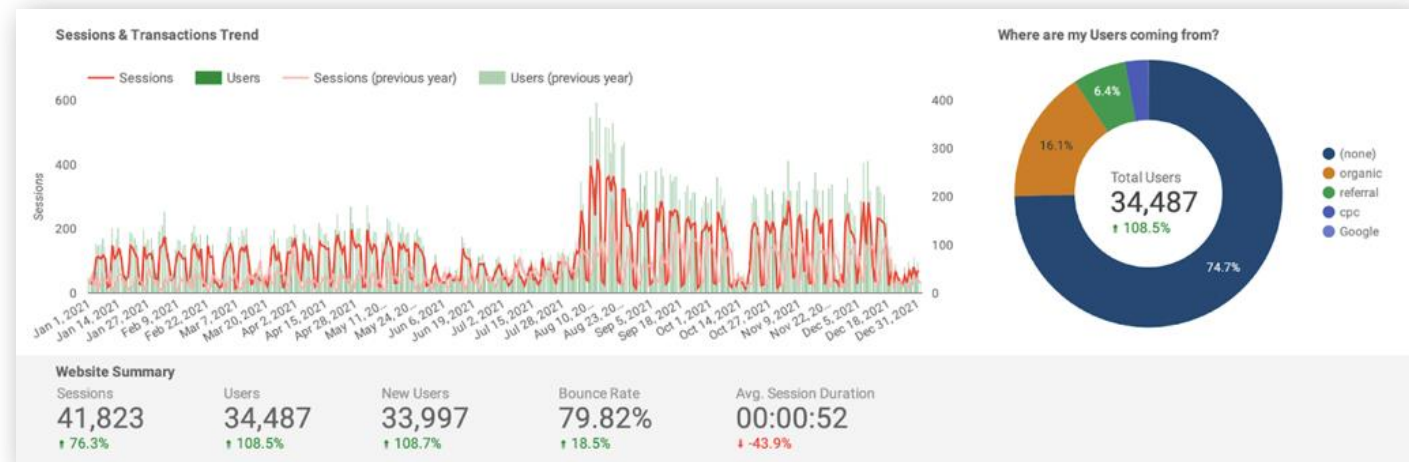
STEAM Schools

Drove 32% growth over 3 years for SET in San Diego.

Digital Impact That Generates Long-Term Success

EDGE High School Moved to the Front Page of Google

- Increased website traffic by 63%.
- 45% increase in organic search.
- Grew website traffic from social media by 3,400%.
- Occupies the #1 position on page 1 of Google for a phrase previously ranked on page 2 and 3.



Working with Charter School Capital provided a big win for us! Their dynamic marketing team allowed us to surpass our enrollment goals for the year well ahead of schedule. Our enrollment numbers continue to climb thanks to their consistent and proactive efforts.

Bob Bourgault, Executive Director, Almond Acres



**Grōw
Schools**

Let's Go Fill Your School

Enrollment Marketing Partnership



Next Steps

1 Align on approach (10/17)

2 Complete contract (2 weeks)

3 Be in market (November)

Innovations Academy Terms Sheet

Terms			
Program Start Date:	November 1, 2024		
Program End Date:	October 31, 2025		
Typical CSC Activities:	<ul style="list-style-type: none"> • Story Arcs • Paid Media • Enrollment-Focused Social Media Content/Design • Search Engine Optimization • Local Search Listings 	<ul style="list-style-type: none"> • Content Calendar • Blogs - Teacher Profiles, Story Arcs • Physical Media (e.g., Postcards) • Learn More/Landing Page • Directory Listings 	<ul style="list-style-type: none"> • Website Updates for Enrollments • Online Enrollment Form • Event Promotions

Fee Structures (Per School)		Option 1	Option 2
Fixed Fee	Fixed Fee	\$38,700	\$105,600
	Billing Frequency	Monthly	Monthly
	Total Billing Months	12	12
Performance Fee	Performance Fee	\$1,365	-
	Performance Fee Basis	Net Increase in Total Enrollment	-
	Final Attendance Report	State Report of Enrollment	-
	Final Attendance Report Date	October 31, 2025	-
	Baseline Attendance	TBD	-
	Baseline Attendance Report	State Report of Enrollment	-
	Performance Fee Billing	November 15, 2025	-

Enrollment Investment Comparison for Innovations Academy

GS Fee Description			Scenario Analysis					
Option	Grow Schools Base Fee Per School	Fee Per Enrollment Increase	Total Enrollment Increase = 0		Total Enrollment Increase = 25		Total Enrollment Increase = 100	
			Est. School Revenue Increase ¹	Total GS EM Fee	Est. School Revenue Increase ¹	Total GS EM Fee	Est. School Revenue Increase ¹	Total GS EM Fee
1	\$33,600	\$1,365	-	\$33,600	\$275,000	\$67,725	\$1,100,000	\$170,100
2	\$105,600	-	-	\$105,600	\$275,000	\$105,600	\$1,100,000	\$105,600

¹ Assumes \$11,000 per pupil funding

In Support



How We've Helped Schools Get Where They're Going

2 million+

Kids accessing a nourishing school environment

900+

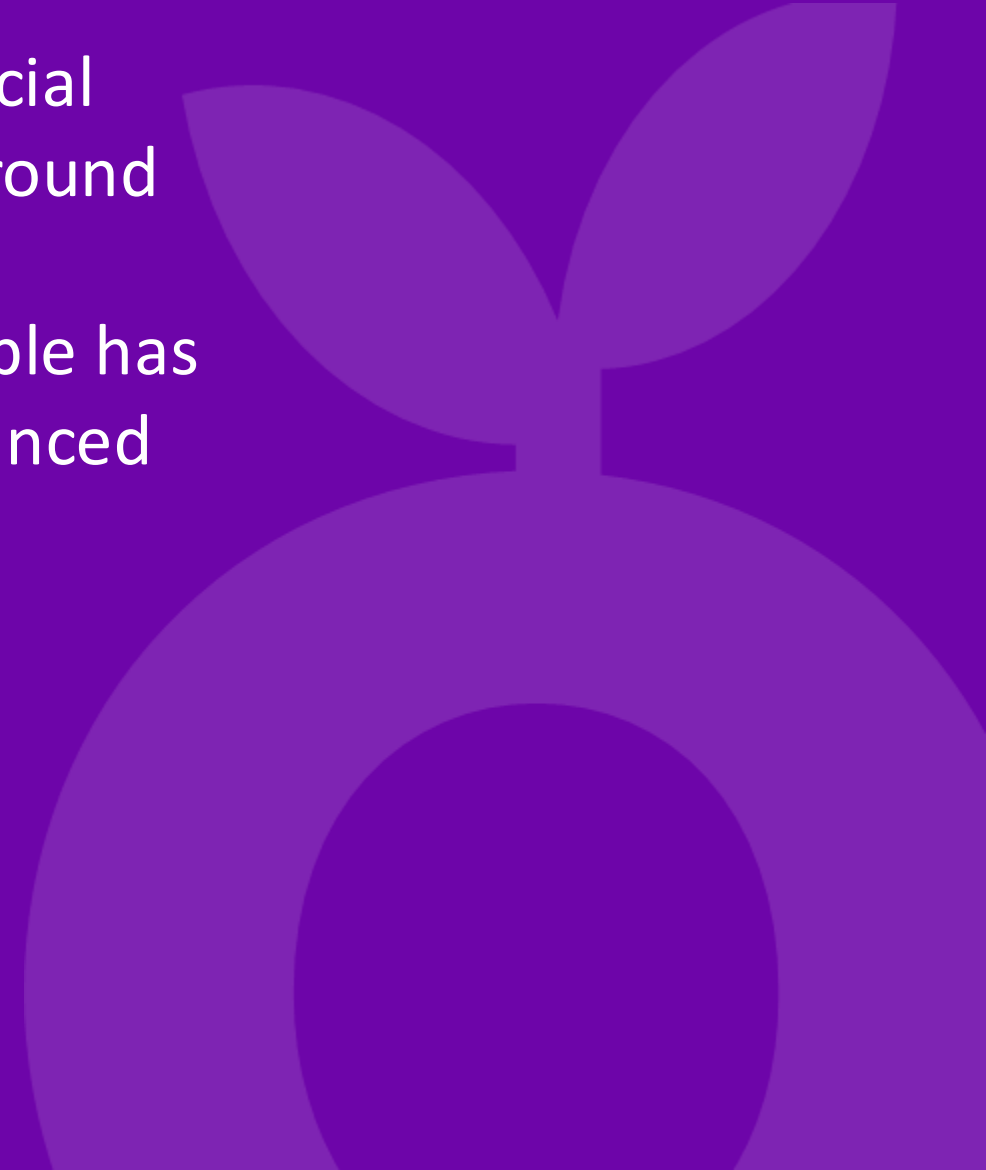
Charter schools supported with the money, resources and know-how

\$3 billion+

of money to help charter schools and their kids flourish

“Grow Schools really helped harness our special qualities by creating an engaging narrative around who we are & what we do. Their expertise in getting the message in front of the right people has given a huge boost to our enrollment & enhanced our online profile.”

CARRIE HEATH,
SET HIGH



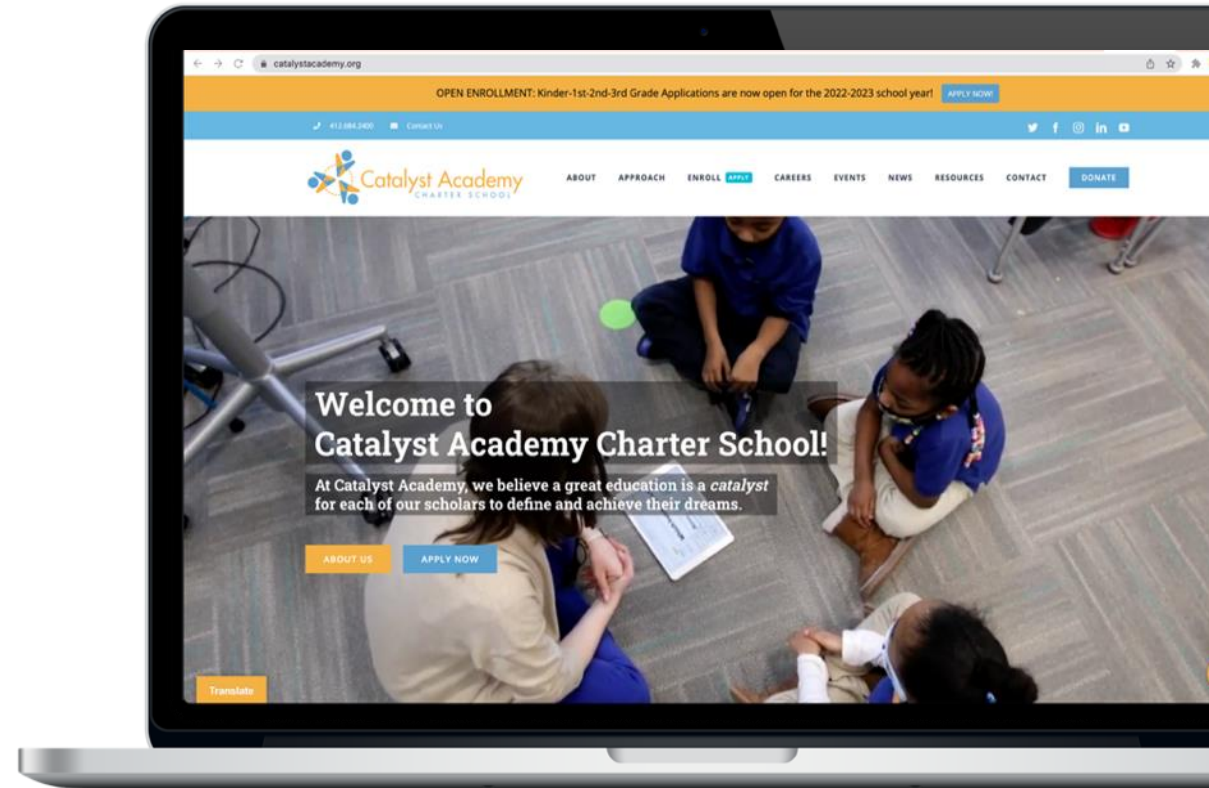
"Despite the COVID-19 pandemic, Grow Schools was able to get 80%+ of our students for new school year pre-enrolled by July (up from ~50%) and increased student count for the year."

JACOB PAWSON
HA:SAN EDUCATIONAL SERVICES

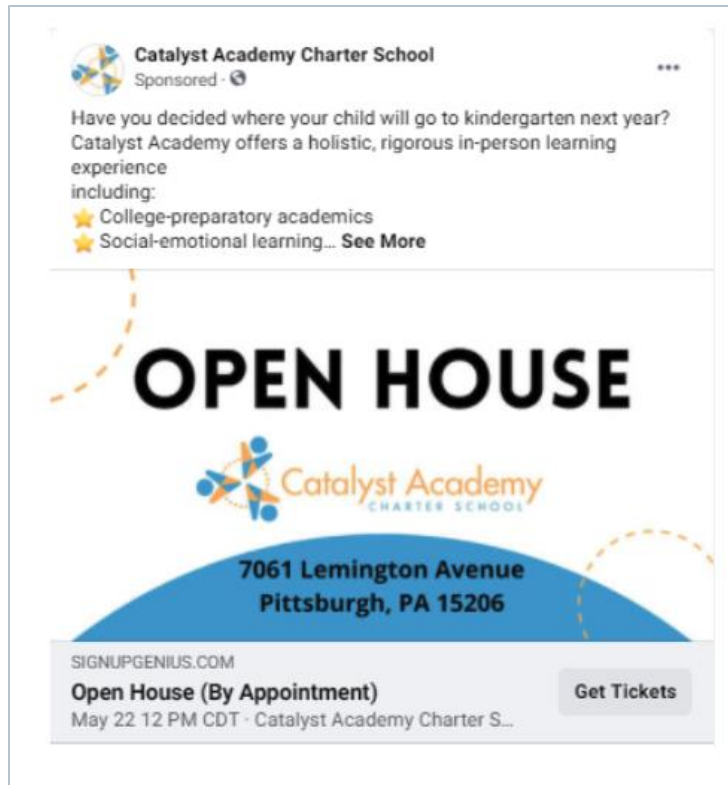


Bringing Kids to Fill Their School During a Challenging Year

- **Challenge:** A new school beginning its journey in the middle of a global pandemic.
- **Path:** Through a guided partnership, was able to double down on marketing efforts to reach and engage families.
- **Destination:** Filled four kindergarten classes and grades 1-2 in the second year.



Bringing Kids to Fill Their School During a Challenging Year



Catalyst Academy Charter School
Sponsored · 🌐

Have you decided where your child will go to kindergarten next year? Catalyst Academy offers a holistic, rigorous in-person learning experience including:

- ★ College-preparatory academics
- ★ Social-emotional learning... [See More](#)

OPEN HOUSE

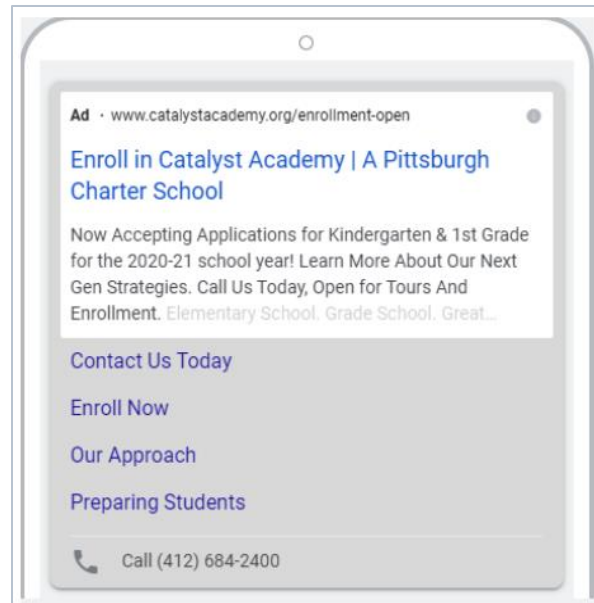


7061 Lemington Avenue
Pittsburgh, PA 15206

SIGNUPGENIUS.COM

Open House (By Appointment)
May 22 12 PM CDT · Catalyst Academy Charter S...

[Get Tickets](#)



Ad · www.catalystacademy.org/enrollment-open

Enroll in Catalyst Academy | A Pittsburgh Charter School

Now Accepting Applications for Kindergarten & 1st Grade for the 2020-21 school year! Learn More About Our Next Gen Strategies. Call Us Today, Open for Tours And Enrollment. Elementary School. Grade School. Great...

[Contact Us Today](#)

[Enroll Now](#)

[Our Approach](#)

[Preparing Students](#)

📞 Call (412) 684-2400



MY CHILD SOARS AT



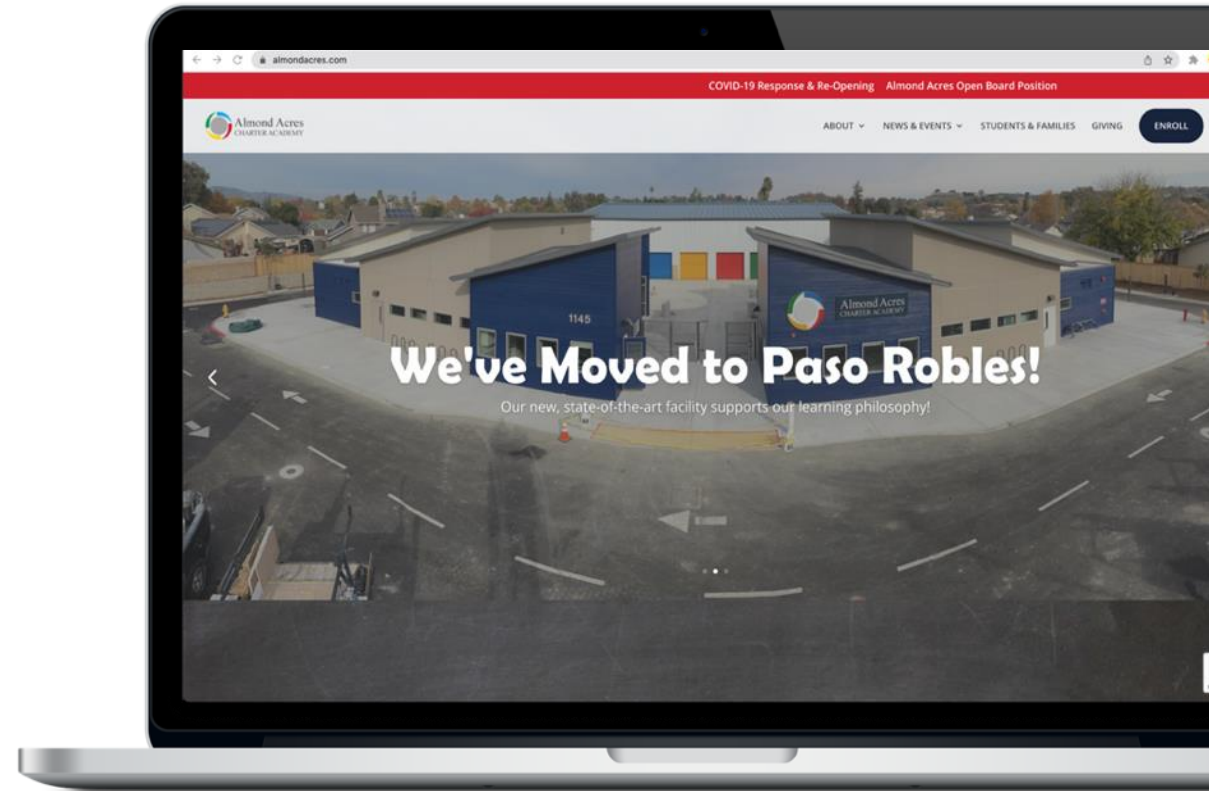
Belong. Grow. Achieve.

412.684.2400 | CATALYSTACADEMY.ORG



A Two-Season Partnership for Kids to Fill Classrooms

- **Challenge:** Moved back to their home community, and into a threat of not being authorized.
- **Path:** Through a partnership, Almond Acres mobilized the community and overcame objections.
- **Destination:** Brought in kids to fill their school two years earlier than planned.



Join us for our virtual
GROUND BREAKING EVENT

Celebrate with the Almond Acres community as we begin the construction of our new school building!



THURSDAY
OCTOBER 22 / 6 PM
JOIN VIA ZOOM



GROWING GREAT KIDS!



COMING SOON

**THE NEW HOME OF
ALMOND ACRES
CHARTER ACADEMY**

GROWING GREAT KIDS!

ALMONDACRES.COM | (805) 467-2095




ENROLL NOW!

FREE K-8 PUBLIC CHARTER SCHOOL

(805) 467-2095
almondacres.com

Growing Great Kids!



Almond Acres Charter Academy | Public School In Paso Robles

www.almondacres.com


We're a Tuition-Free Public School Serving Grades K-8 from all Communities. Working to ensure that students have access to high-quality education. Enrollment is Open.

[Visit Us](#)

[Enrollment Open](#)

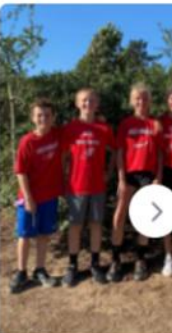
Almond Acres Charter Academy
Sponsored

Almond Acres Provide Families a Choice in Education for Your K-8 Grader. We Teach Core Curriculum Like English Language Arts (ELA), Math, Social Studies, Science & More.



Tour Our State-of-the-art Facility
See Why Parents Choose Us

Apply now



Our student-centered approach informs...
We're Passionate about Learning



¡Formando niños fantásticos!



¡INSCRÍBANSE AHORA!

Escuela Charter pública y gratuita para grados K-8

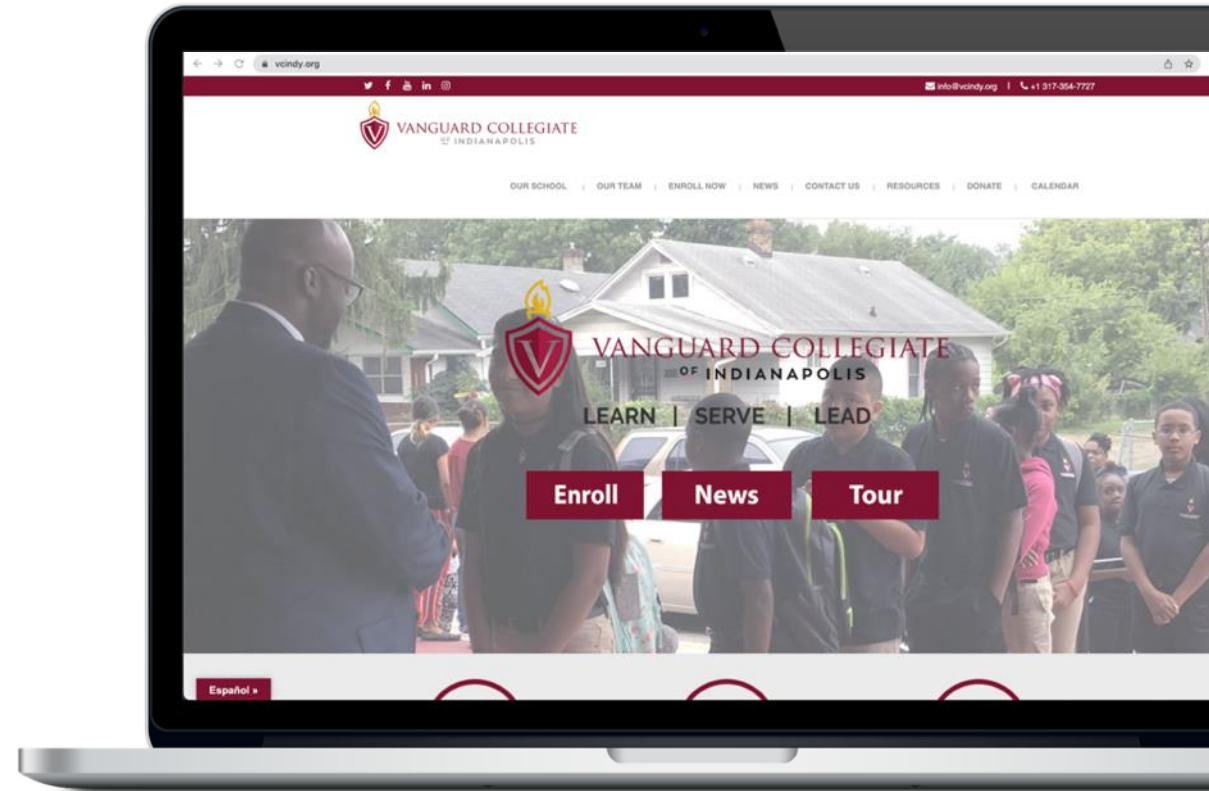
AHORA EN PASO ROBLES

(805) 221-8550 | almondacres.com



Kids to Fill Classrooms in Indianapolis

- **Challenge:** Vanguard Collegiate needed to keep their number of kids steady.
- **Path:** Scheduled regular weekly meetings and partnered for a plan for regular community activism.
- **Destination:** Although enrollment didn't increase, the numbers of kids held steady during the pandemic— and despite moving buildings.





DIGITAL MARKETING ESSENTIALS FOR SCHOOLS

Project proposal
Core Essentials

Client
Innovations Academy

ABOUT THIS STRATEGY

Hi Christine, and team! Thanks for considering us as your marketing partner for the school. I think this is a terrific opportunity, and I think we have the perfect package for what you are trying to accomplish.

We've designed a program consisting of what we deem essential marketing strategies for schools. We call it our **Core Essentials+** package, and it is our foundational program that covers all the essential components of an effective school marketing plan. Then we baked in 5 hrs. of discretionary services each month to make sure we can cover you for any contingency. This package consists of the following 7 components:

Component 1 | Search Advertising (Google, Yahoo & Bing)

Component 2 | Display Advertising & Retargeting

Component 3 | Social Media Advertising

Component 4 | Social Media Publishing (Optional)

Component 5 | Directory Management

Component 6 | Reporting & Analysis

Component 7 | Discretionary Services

This package is designed to increase brand awareness through search and social strategies and convert that traffic into enrollment inquiries with our built-in discretionary services.

On a side note, I thought it might be helpful to show you some actual examples from the field. Not exactly a case study, this features some actual ads from one of our schools. [\[CLICK HERE\]](#)

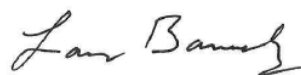
I think you will really enjoy working with me and my team, and you have my assurance of personal attention and professional work at every stage of this project.

Sincerely,
Chuck Bankoff



Director of Web Services
Kreative Webworks Inc.

Larry Barnaby



Director of Strategy
Kreative Webworks Inc.

***the* CORE ESSENTIALS PACKAGE:**

We work almost exclusively with schools and have developed a suite of specific strategies that we deem as being essential for all successful enrollment marketing campaigns. We use this as the foundation for our comprehensive "Discretionary Strategies". For most schools this package, or this package with additional discretionary time allotment is all you will need.

Component 1 | Search Advertising (Google)

Google ads management for schools is one of our most successful strategies and has been an area of expertise for us since 2004.

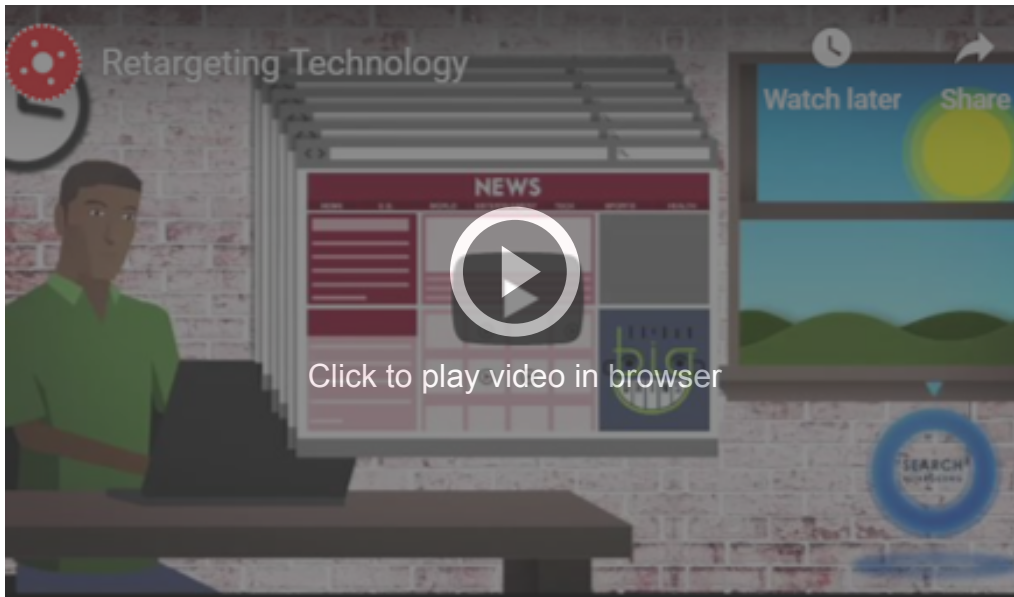
- **Smart Technology:** Our platform tracks which keyword phrases resulted in a positive call to action; like a phone call, an email, or a submitted form or application. It collects this data and over time reallocates the budget to spend it on the phrases that have a track record of actually resulting in real leads... not just visits.
- **Creative Ad Design:** We design and write multiple Ad groups using Google's new Responsive Search Ads parameters. This gives us a multitude of different ad configurations which are optimized over time through automated testing.
- **Transparent Reporting:** You can log on at any time (24/7) and monitor how much you spend, and the results for each and every day the campaign has been running. We can even record the actual phone conversations that are a direct result of the leads that we send you. We get the phone number of every unblocked phone that the calls originate from. Unless otherwise requested, we may listen in on recorded calls on your behalf to make improvements to your campaigns and make suggestions if we spot issues.
- **Budget Analysis:** Prior to committing your marketing budget to Google, Yahoo and Bing, we do the research to statistically estimate the number of visits you can expect to get for your money. *(See the Fees & Budget section for preliminary analysis).*

We do not run this out of your Google platform, we run this on our bid management platform, which allows us to run simultaneously on Google, Yahoo & Bing from a single budget. Our platform tracks which keyword phrases resulted in a positive call to action; like a phone call, email, or submitted form. It collects this data, and over time reallocates the budget to spend it on the phrases that have a track record of actually resulting in real leads...not just visits.

Live Demo: Want to see an actual school marketing campaign in action? Just ask and we will take you on a tour of *LIVE* Google Ads campaign from a current school we are managing.

Component 2 | Display Advertising & Retargeting

When a parent or student visits your website, regardless of the means (SEO, Pay-Per-Click marketing, email, or directly through a browser) we can “tag” them so as they go about their business visiting other websites over the following hours, days or weeks, they are repeatedly exposed to your message and incentivized to click through to your website.



Watch the 2-minute Video Explanation of Retargeting Technology

We will design the artwork for multiple themes in multiple dimensions. We typically design about 5 ad variations in 5 different dimensions (approximately 25 ads total). We launch this concurrent with the PPC campaign.

Component 3 | Social Media Advertising

We have designed a suite of Social Media Advertising strategies that are designed to work together to maximize brand awareness of your school and drive actionable leads to follow-up with. We will recommend a specific strategy based on several of the tactics listed below:

- **Strategy 1:** Remarketing
- **Strategy 2:** In-Network Lead Form
- **Strategy 3:** Downloadable PDFs or eBooks (optional)
- **Strategy 4:** Event Responses
- **Strategy 5:** Landing Pages (Optional)
- **Strategy 6:** Direct Messaging

Your dedicated success manager will design your custom ads, manage your social media sales funnel, track & monitor your results and review audience insights and reports with you during your regularly scheduled meeting. Our program includes:

- FB, IG, LinkedIn Paid Ads Creation and Management
- Dedicated Success Manager
- Monthly Personal Consultations
- Social Media Optimization
- Persona Development
- Tracking & Remarketing
- Audience Insights & Reports
- Phone & Email Support
- Creation and management of Messenger automation

Component 4 | Social Media Publishing (Optional)

We create top-of-mind awareness through publishing consistently, growing follower counts, and increasing the number of users seeing and engaging with each post. Our creative team will lead the creation and publishing of custom content for your social channels. You will have the opportunity to contribute, but many of our schools only provide direction and rely on us to license and create imagery and captions. This portion of the program includes:

- Facebook | Instagram | GMB | LinkedIn | Twitter
- Dedicated Success Manager
- Monthly Personal Consultations
- Social Media Optimization
- Custom Content Creation
- Monthly Content Calendar
- Industry Post Subscriptions
- General Interest Post Subscriptions
- Monthly Holiday Posts
- Audience Insights & Reports
- Draft Post Collaboration
- Phone & Email Support

Component 5 | Directory Management

Directories are essential for local businesses, and schools are local businesses. They are a source of links, traffic, and trust. Search engines use them for validation, and people use them to find what they are looking for. We create and maintain your profile on over 39 top-tier major aggregators, search engines, directories, and the apps that matter most. We will set you up with direct access so that you can monitor our progress. We will also monitor your reviews on each of these directories. This is an ongoing process.

Component 6 | Reporting & Analysis

Our comprehensive reports are available 24/7 and are updated in real-time. Although you can access reports on-demand, we will send you monthly reminders to check-in. There is even an option for you to schedule a review with a senior strategist directly from the report.

Component 7 | Discretionary Services

We know from experience that there is a lot more to enrollment marketing than just driving traffic to a school website. We pride ourselves on being flexible, which is why we've baked in up to 5 hrs. of discretionary services each month. This might include, but is not limited to:

- Website health monitoring and technical fixes
- Content Management
- Graphic design
- Email campaigns
- Strategic planning
- Coordination with 3rd parties
- Copywriting
- Email marketing
- Consulting on Recruitment or any other marketing

Benefits:

- Maximum flexibility to account for virtually anything
- Priority Support
- Lock in discount rates for projects and overages
- Fudge factor time allowance (Borrow time from past or future months)
- Supplemental packages are available at our priority discounted rates

DISCRETIONARY STRATEGIES

Below is a sample of some services that we manage for our school clients. In most cases, these will be covered under your **Discretionary Services** allowance. Occasionally we may recommend approaching these as separate projects so as not to deplete your bank of time.

Content & Copywriting:

Our content team can help you develop your messaging strategy and is adept at writing compelling copy that resonates with both families...and Google.

Prospectus (Brochure) Design:

Downloading a slickly designed, magazine-style brochure can be "Gated" or "Ungated". If Gated, the prospective family would have to give you their contact information to download. You can then follow up at your leisure. Ungated means they can download the Prospectus anonymously. You would typically have more downloads with ungated content, but you will have more serious leads with gated content. We offer a Simple and Upgraded version.

Chatbot Strategies:

Students and parents of school-aged children are often more comfortable tapping out letters on a device than on talking on a phone. They seek real-time communication. We can do a simple set-up or more advanced A.I. programming to engage families even when no one on your team is available to chat.

Spotify Advertising:

Spotify is a free and paid streaming app. The free version requires the listener to listen to ads. We can segment by various demographics including geography, interests, type of music, age, etc. We will design the strategy, write your script, oversee the voiceover and manage and report on the entire process.

Accessibility Management:

Pending evaluation, we may make permanent upgrades to the website or use a third-party compliance software service to ensure ADA /WCAG compliance.

Website Health Monitoring:

We are actively monitoring the technical health and marketing readiness of your website. Examples of our monitoring and recommendations include broken links, slow load times, ADA Compliance issues, search engine fundamentals, and much more. We will provide regular reports and suggestions if any issues are spotted.

Website Maintenance & Content Management:

If we have proper access to your website and are familiar with the technology, we will maintain the technical health of your website and work directly with your host if necessary. We will troubleshoot technical issues and make basic content changes to the site as necessary under your discretionary time allowance. Extensive design or coding rework may require a separate quote.

Consulting & Continuous Improvement:

We have an open-door policy. Should you want guidance on any marketing initiatives, just let us know. As we monitor results and analyze data, we may proactively make suggestions to you.

BIGGER STRATEGIES

These high-impact strategies require substantial upfront planning and a high degree of expertise. These are essentially individual projects, so we will either quote on a case-by-case basis or recommend a supplemental service package (increased time allotment).

Lead Nurturing & Marketing Automation:

- **CRM Set-up:** We will set up your Customer Relationship Management platform where your leads will be housed and your drip email workflow will be automated. Depending on the CRM we may be restricted by the technology. (We will recommend a CRM platform)
- **Landing Page Design:** We will develop custom landing pages as necessary as part of your marketing funnel strategies.
- **Lead Magnet Design:** These are typically pieces of premium content that are valuable enough that a prospect will download them in exchange for their contact information. It could be a school prospectus or a specialty piece that addresses something pertinent to the target market such as bullying, or questions to ask during an open house, etc.
- **Email Workflow:** We will create a series of 6-8 strategically designed emails for our drip-marketing sequence. Each one will have a subtle Call-To-Action and build upon the previous one.
- **Chat | Facebook Messenger Bot Strategies:** We will design the A.I. bot and install it on your website.

Search Engine Optimization:

Our SEO program includes managing all aspects of search engine fundamentals, including custom content development. Potential strategies include: Keyword research

- Onsite Technical factors
- Meta-content design
- Content Pillar Articles of between 1800 to 3000 words.
- Cluster Articles: (Page or blog) articles of between 750-1000 words.
- Images and formatting. Includes on-site table of contents if necessary.
- Page Linking (Internal & external)
- Social Bookmarking (for backlink building)

WHAT'S NOT INCLUDED?

To avoid any misunderstanding or unpleasant surprises, we want to make clear what is NOT included in this particular program. Note that we are competent and capable of many additional services, and are amenable to modifying this agreement to include services that are currently outside of this scope. The modifications may result in a change of fees and or timetable.

Third-Party Fees:

The following examples are typical third-party fees that the school will have to cover. Wherever possible, we try to sign the school up with its own account so that you have direct control should we ever cease working together. These are just typical examples, not an exhaustive list. Your mileage may vary:

- Accessibility Management Software
- Live/Programmable Chat platforms
- Reviews Acquisition service
- Website Hosting if Necessary
- CRM Platform fees like SharpSpring, Engagebay, or HubSpot

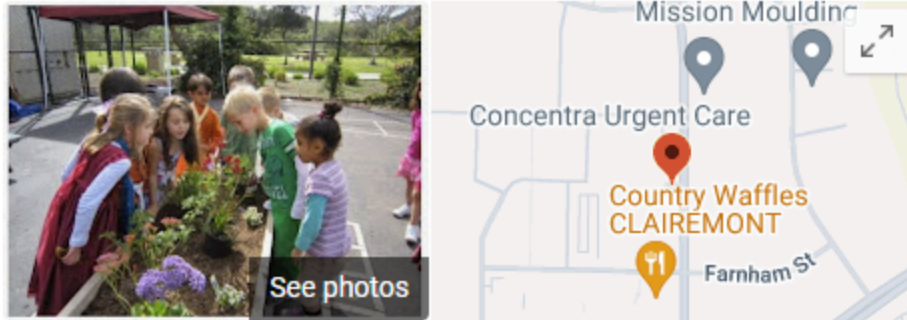
Advertising Budgets:

The following examples are typical budgets that may be part of the strategy:

- Pay-Per-Click (Google Ads)
- Retargeting
- Facebook/Instagram
- Spotify Advertising

Whenever possible, we try to use the school's credit card so as not to handle your money unnecessarily. However, depending on the platform, it may be easier for us to pay on your behalf and invoice you.

REPUTATION



Innovations Academy

3.7 ★★★★★ 23 Google reviews

Charter school in San Diego, California

[Website](#) [Directions](#) [Save](#) [Share](#)

[Call](#)

Address: 5454 Ruffin Rd, San Diego, CA 92123

Tax ID: 26-0418421

Phone: (858) 271-1414

District: San Diego Unified School District

Lowest grade: Kindergarten

[Suggest an edit](#) · [Own this business?](#)

[Listing Details](#)

[Add missing information](#)

[Add business hours](#)

GETTING STARTED

Here are the next steps:

1. Once you feel confident about everything and are ready to move forward, please click the 'sign here' button below.
2. You can save and print a copy for your records by clicking on the the "3-dots" on the bottom right of any page.
3. If you'd like to speak to us by phone, don't hesitate to call 9492766062.

Description	Price
Strategy Fees (Waived per Blueprint completion)	\$2,000
<input checked="" type="checkbox"/> Core Essentials Program (No social publishing)	\$2,300/ month
<input type="checkbox"/> Core Essentials Program+ (Includes social publishing)	\$2,999 / month
Total per month	\$2,300

Total

\$2,000



SIGNATURE

Larry Barnaby

Larry Barnaby,
Kreative Webworks, Inc.



SIGNATURE

Christine Kuglen

Christine Kuglen
Innovations Academy

PPC (Google) Advertising Budget Analysis

IMPORTANT: The 3 budget samples below are not finite. The actual budget can be more, or less, or anything in between. It is also not a commitment, it can be updated as necessary.

Search Marketing - Estimate

K-12 Schools / Education & Instruction

Geo Targeting

1 City (Poway California)

1 City (San Diego California)

NOTE: The 2 cities above encompass all the zip codes provided.

Est. Audience Size: 6,070,000

Est. Population Within Selected Area: 1,405,313



Recommended Investment with Average Campaign Statistics*

Representative	Competitive	Prominent
Impressions: 2,843 - 6,663 Clicks: 499 - 805 Click-Through Rate: 13.7% Cost per Click: \$3.11 - \$5.01	Impressions: 3,549 - 7,497 Clicks: 580 - 888 Click-Through Rate: 13.3% Cost per Click: \$3.94 - \$6.03	Impressions: 4,123 - 8,137 Clicks: 647 - 959 Click-Through Rate: 13.1% Cost per Click: \$4.69 - \$6.96
\$2,500	\$3,500	\$4,500

* All estimates are per cycle. The statistics are estimated expectations based on industry averages and cannot be taken to infer actual performance. These expectations can be used as a benchmark for your campaign. Individual campaign performance will vary.

Retargeting & Display Advertising Budget:

High-impact Retargeting goes hand-in-hand with Google ads and any other advertising that drives traffic to your website. This low-cost, high impact service works in tandem with our Search & Social strategies. We show your banner ads to consumers who have already expressed interest, and “re-target” them for conversions.

Recommended \$500/month

Social Media Strategy & Projections

These recommendations were developed by our Social Media Team Leader Jonathan, who took into consideration the specific demographics of your ideal families based on our initial discussions.

Audience: Parents with children ages 4-12 within your targeted zip codes.

Estimated Audience Size: 14,500 people

Brand Awareness/Remarketing: Our strategy will introduce Innovations Academy to new families to build interest in enrollment. We will emphasize Innovations Academy's unique project-based learning approach, fostering inquiry, creativity, and critical thinking in students. By highlighting the school's commitment to hands-on, student-centered education, we'll attract families who prioritize active learning and personal growth. Showcasing student projects and achievements will illustrate our vibrant learning community's success.

Website Traffic: After building awareness, we'll direct potential families to Innovations Academy's engaging website. Here, families can learn more about the depth of your project-based curriculum, the inclusivity of your community, and the breadth of your student-led inquiries. We aim to make Innovations Academy the top-choice among prospective families and capture their information with on-site inquiry forms.

Lead Generation: The final phase involves turning interest into tangible inquiries and applications. Through targeted advertising, we'll make it easy for families to connect with the school, either by learning more or by applying directly. Through clear calls-to-action and targeted outreach, we'll facilitate a smooth transition from curiosity to active engagement, welcoming new families into your innovative learning environment. While not every inquiry will lead to enrollment, each interaction is an opportunity to expand your community and affirm Innovations Academy's status as a leading choice for innovative education.

[See Budget & Projections Next Page](#)

Brand Awareness & Audience Building with Facebook & Instagram			
---	--	--	--

Strategy	Projected Cost per Result	Minimum Monthly Spend	Projected Monthly Results
Remarketing	\$5.30 per 1,000 Impressions	\$300.00	56,500 Impressions

Website Traffic Lead Generation on Facebook & Instagram			
---	--	--	--

Strategy	Projected Cost per Result	Minimum Monthly Spend	Projected Monthly Results
Landing Pages	\$1.12 per Website Click	\$500.00	446 Website Clicks
In-Network Lead Form	\$47.41 per Lead Generated	\$1,500.00	32 Leads Generated

Other Strategies for Website Traffic & Lead Generation on Facebook & Instagram			
--	--	--	--

Strategy	Projected Cost per Result	Minimum Monthly Spend	Projected Monthly Results
Calls	N/A	\$1000.00	<10 Calls

Please note: Projected results based on education industry averages, prior results, and tuned to parents with children ages 4-12 within your targeted zip codes.

OUR QUALIFICATIONS

Kreative Webworks has been in continuous operation since November 1999. We have a legacy of satisfied clients spanning more than 2 decades. We worked with our very first school in 2011, and after developing a reputation in the education industry, we committed our company entirely to education marketing in 2015.

95% of our client portfolio are charter schools or private schools. We may work with other industries from time to time, but all our processes and resources are dedicated to school-specific enrollment marketing services.

We are a small, focused agency of 8 core staff and an extensive network of pre-vetted long-term partners who work exclusively with agencies like us. We do the vast majority of the work ourselves in-house and leverage our partner's expertise for very specific strategies such as Public Relations and certain media buys.

Our Most Popular School Marketing Services

We offer a comprehensive list of marketing-related services specifically for schools. In most cases, we design custom "packages" of services depending on what the school needs. Not every school needs all our services of course. Here is a list of our most popular services:

1. Digital Marketing Strategy (Digital Marketing Blueprint for School)
2. Website Development & Website Management
3. Content & Copywriting
4. Social Media Advertising & Social Media Posting (Facebook, Instagram, Spotify, etc.)
5. Search Engine Marketing (Organic and Google Ads management)
6. Targeted Display Advertising
7. Lead Nurturing & Marketing Automation (including email marketing)
8. School Prospectus Design (slick magazine-style brochure)
9. Chatbot design (including Facebook Messenger Marketing)
10. Virtual Enrollment Team (we follow up on the leads)
11. Full Branding packages

Why Kreative Webworks?

1. **Specialization:** We work almost exclusively with schools and can leverage our years of experience with charter and private schools for you. We don't have to learn on the job.
2. **Flexibility & Versatility:** We've developed a robust suite of services that encompass the elements of "Site, Search & Social". Since we have all the pertinent skills, we don't shy away from refocusing when change is warranted.
3. **Strategy-Driven:** Before we spend our time or your money on anything, we thoroughly plan it out. Website layouts are wireframed ahead of time, and marketing strategies and even website copy are based on specific "buyer personas". We are a strategy-first organization and are the original creators of the "[Digital Marketing Blueprint for Schools](#)".
4. **Our Network:** With over 2-decades in the digital marketing industry, we have cultivated a vast network of strategic partners that can be leveraged for their specific expertise. Every one of our partners has been pre-vetted, not just Googled at the last minute.
5. **Award Winning:** We have won multiple industry awards including the WMA Web award for Outstanding School Website for 2 years running.
6. **Rave Reviews!** Go ahead and Google; *reviews, kreative webworks*. Then try this with any of the other agencies you are considering.
7. **Longevity & Stability:** We started about the same time as Google, and before Facebook. We are a stable company that will not close shop and leave you hanging. We will be here for you.
8. **Value:** We aren't just order takers who leave all the thinking up to you. We are professionals who are accountable for our work. We won't rely on you to provide every word of copy. In fact, over 30% of our quote is devoted to writing and tweaking copy and the strategies that go along with it. It's the messaging that converts! We may not be the least expensive, but we will be your best investment.
9. **Google Rating:** We are provide to have a 4.9 star rating on Google. It's one thing for us to tell you how good we are but another when our clients let you know.

OUR WORK

Recent School Websites we've developed:

- [Paideia Academy](#) (Recent WMA Web Award winner)
- [International School of America](#)
- [Villa Academy](#)
- [Foothill Preparatory School](#)

Examples from the Field:

Not exactly a case study, but some actual samples of what our ads look like “in the wild”

- [Examples from the Field](#)

Case Studies:

- [Albert Einstein Academy](#)
- [Villa Academy](#)

Client Reviews:

You can just Google us, but here are some direct links to some of our client reviews:

- [Customer Lobby](#)
- [Google Search Results](#)

TERMS & CONDITIONS

Term:

This is designed as a 12-month program. After the initial term, services will automatically revert to month-by-month. You may terminate services anytime after the initial term with a 30-day written notice (email that we acknowledge as received is considered written notice). You may upgrade or downgrade your package at any time. Changes to packages take effect at the start of the next fee cycle. Third-party services, such as Advertising spend (Google, Yahoo, Facebook, etc.) will be put directly on your credit card.

Our No Hostage Policy:

Although this is a 12-month program, we will not hold you hostage if you don't believe you are getting value from our services. You may cancel anytime with a minimum of 30 days' notice. Due to the extensive lead times, Social Media services may be subject to a 30-day termination notice. We only ask that you participate in a brief exit interview so that we might use your experience to improve our processes. On rare occasions, we may "advance" hours during the early part of the project. Those hours will just need to be accommodated for during any early termination.

Payments:

You may opt to pay by check or credit card. However, a credit card may be mandatory for some advertising budgets such as Google, etc. Invoiced payments via credit card are subject to a 3% convenience fee. Google ad budgets are not subject to the convenience fee. Invoices for our management fees are sent at the beginning of each payment cycle, prior to services. We will generate invoices in advance of the due date based on your internal lead times.

Fudge Factor Time Allowance:

We keep very strict records of our time, but we don't like generating additional invoices if we can work around it. We reserve the right to charge for any time over and above your discretionary time allowance, however, we may, at our discretion, borrow unused time from a previous month, or pull time in from a future month so as not to generate small annoying invoices. If we go over allotted time consistently or accumulatively over a period of months, we may back charge for that time and/or suggest an increase in your discretionary time allotment.

Generic Legal Stuff:

- This Agreement shall be interpreted and construed under the laws of California. The parties agree that any action brought by either party against the other shall be brought in California and the parties do hereby waive all questions of personal jurisdiction or venue for the purpose of carrying out this provision.
- In the event of default by GPS under this Agreement that is not cured within ten (10) business days after receipt of written notice (which may be by email) , KreativeWebworks, Inc. shall have the right to terminate this Agreement. The Client shall have no right to a refund of any kind and will be responsible for all costs and attorney fees incurred by KreativeWebworks, Inc. in connection with the Client's breach of this Agreement.
- If any action or proceeding is commenced to construe or enforce this Agreement or the rights and duties of the parties hereunder, then the party prevailing in such action, and any appeal thereof, shall be entitled to recover the costs of and expenses of bringing such action plus its attorney's fees and cost in that action or proceeding, as well as all costs and fees of any appeal or action to enforce any judgment entered with respect thereto.
- Under no circumstances shall KreativeWebworks, Inc. or its agents be liable to the Client for any network interruptions beyond the Company's control, including without limitation, any downtime regarding computer servers or interruption of Internet service providers, or any third-party issues beyond our control.
- Kreative Webworks will make every effort to maximize client ROI based on experience and technological expertise. No specific results are guaranteed.
- Invoices are due upon receipt and will be charged on client-supplied credit card, or paid by check. Unpaid invoice amounts that are more than 30 days past their due date are subject to a late charge of 1.5% per 30 days. Invoices that are 30 days past due may, at the sole discretion of Kreative Webworks, be submitted to a third party for collection. In addition to the interest outlined above, in the event unpaid invoices are sent to a third-party collection firm, the Client shall be responsible for the unpaid balance due and owing plus any and all collection fees including but not limited to attorneys' fees and any other costs or expenses incurred by Kreative Webworks to collect past due amounts.

OUR PROCESS

STEP 1 | KICK-OFF MEETING

We will schedule a kick-off meeting with you and any designated key members of your team. We will introduce you to the key players on our team that will be involved in the project. During the meeting, we will discuss priorities, communication, and expectations. We also plan on discussing any website "clean-up" activities that require login credentials that we will need.

STEP 2 | MONTHLY MEETINGS

These meetings are not just for us to report our progress to you, but also an opportunity for you to let us know what is in the works on your end. For us to be effective, we need sufficient lead time to help you with any initiatives that you may need us to help you promote. During these meetings, we will review our progress, and maybe request feedback from you on topics such as new ad-creative for social media or search strategies, or website enhancements and updates.

STEP 3 | MONTHLY REPORTING

Our comprehensive summary reports are available 24/7. For the most part, they are self-explanatory, however, we will review them with you during our monthly meetings, or upon request. We will give you direct access to the same reports that we use to manage your campaigns and show you how to read and interpret them per your request.

STEP 4 | ONGOING COMMUNICATION

Nothing can sabotage your results faster than poor communication. That's why we put policies in place to assure efficient two-way communication. That means it's a two-way street, and we can achieve greater success by adhering to a set of guidelines:

Open Door Policy: As our client, we encourage you to ask questions, offer feedback and provide constructive criticism when warranted. We don't restrict phone calls or emails, if our team is available when you call, we will speak with you. If you anticipate a call to last more than 10 minutes or so, we encourage you to email us first so that we can reserve enough time to get the most out of our conversation.

Meeting Punctuality: Our meetings are mostly virtual, which means that we each have to "dial in" at the agreed-upon time. If one of us is late, or a no-show, that means the other party has to wait on the meeting hoping the other party didn't forget. For that reason, we encourage you to put our scheduled meetings on your calendar with a reminder. Rescheduling is not a problem, just let us know as soon as you do, and we will do the same for you.

Communication Systems: We use a project management system called Teamwork. Teamwork's project management tool can be used to send messages and share and collaborate on files, documents, and tasks. We use it to keep track of all project conversations. Teamwork uses a simple, visual interface to help individuals and teams manage their shared and personal projects and tasks. Don't worry, it's easier than it sounds. In fact, you will get all notifications via email, and you can just simply reply to us. If you prefer to work with us via email, no problem.

What's New? Do you have an event scheduled? Let us know with as much lead time as you can. We can help get the word out, but not if we are informed at the last minute. Remember, everything has a lead time.

Change in direction? Keep us in the loop at the earliest stages. We might have useful business suggestions, and a change in your direction inevitably means a change in our direction. That means that we may have to change our strategies, along with the content we produce. We don't want to squander your time working on yesterday's initiatives.

Courtesy Acknowledgements: We understand that you might be too busy to respond to us right away. We don't expect you to sit by the phone or to prioritize our emails over the dozen other things that need your attention at that moment. But emails do go into spam folders for unexplained reasons, and voicemails can get buried. The problem is, if we assume that you received our message when you didn't, we might be holding up your project waiting for a response that will never come. For that reason, we request that you immediately acknowledge that you received our message even if you can't do anything about it right away. Simply say something like *"Got it! I'll get back to you when I have the time"*. That will allow us to make adjustments to the work we have planned for you while we're waiting for you to get back to us.

Clarity of Communication: From time to time we get vague requests from our clients. For example, we may get a Word doc or a link to something with no information, instructions, or background. If we are not sure what you have in mind, we will have to contact you to make sure we don't misinterpret your intentions. This may divert our resources away from something we are already doing for you. We simply ask that whenever you communicate with us, assume that we have no point of reference and give us a short overview of what you are sending us and why. Of course, we'll do the same for you.

OUR MANAGEMENT TEAM



Larry Barnaby

DIRECTOR OF STRATEGY

"Marketing is no longer about the stuff that you make, but about the stories you tell."

- Seth Godin



Simon

OPERATIONS MANAGER

"Give a person a fish and you feed them for a day; teach that person to use the Internet and they won't bother you for weeks"



Davina

CLIENT SUCCESS MANAGER

"I've always believed that if you put in the work, the results will come."



Chuck Bankoff

DIRECTOR OF WEB SERVICES

"There cannot be a crisis next week. My schedule is already full."

- Henry Kissinger

NICHE® 

Modern Enrollment Marketing

Market Where the Families Are

Welcome Innovations Academy Board

Susan Speiser, K-12 School Specialist



Proposal Overview

◆ Niche Parent Survey results, 3-6

◆ 2024 Enrollment & Marketing Guide, 7-10

- Review of your current free Niche profile traffic
- Performance of upgraded Niche clients in your community

◆ Overview of Niche Features & Benefits, 11-17

◆ Dedicated Support, 18

◆ **Niche Digital Marketing Recommendation, 19**

- **Impact enrollment & bring best-fit families to your website**
- **Tap into military families doing research online**
- **Provide powerful results and measurable, trackable data**
- **79% of your families now rely on school search sites to choose a school; *Niche is the leading school search site in your community and across the country***

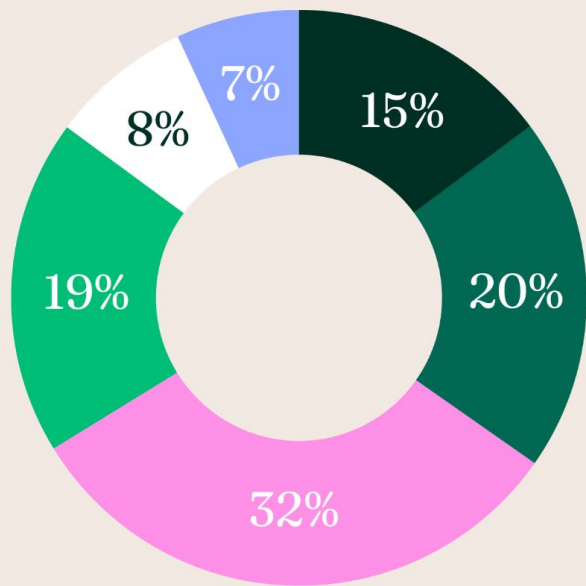


Niche Parent Survey Results

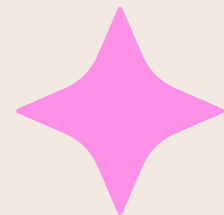
*Data to inform your outreach,
admissions, and marketing plans*

CATALYST AND AWARENESS

When the Search Started

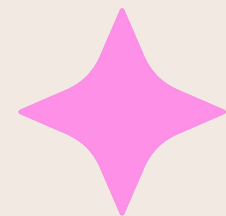
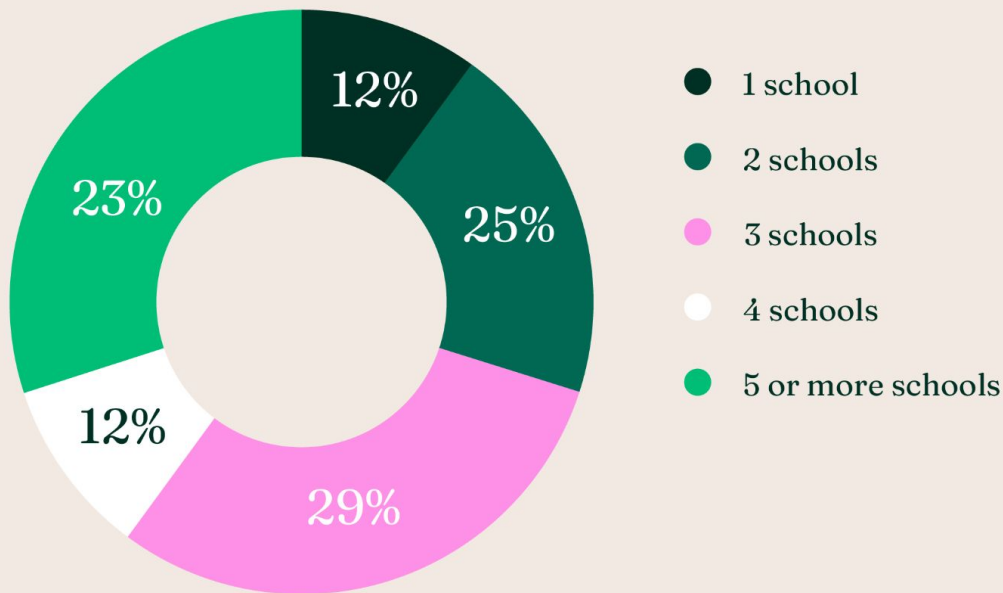


- Less than 3 months before enrollment
- 3-6 months before enrollment
- 6 months to a year before enrollment
- 1-2 years before enrollment
- 2 or more years before enrollment
- I only considered my local public school



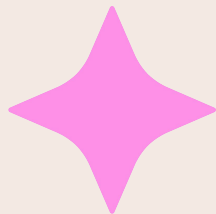
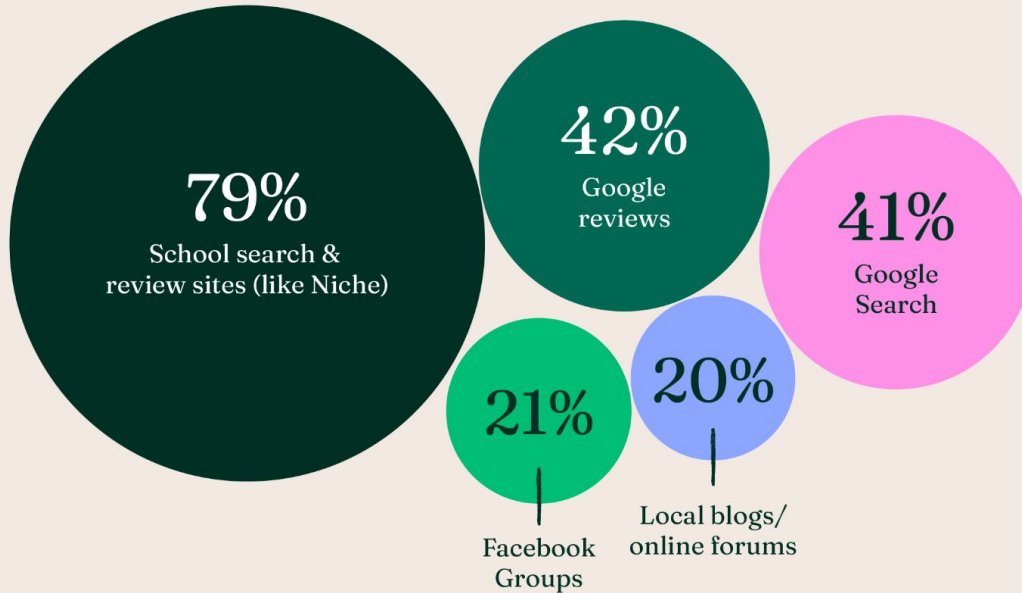
CONSIDERATION/ENGAGEMENT

The Number of Schools Parents Considered



CONSIDERATION/ENGAGEMENT

Preferred Online Research Tools



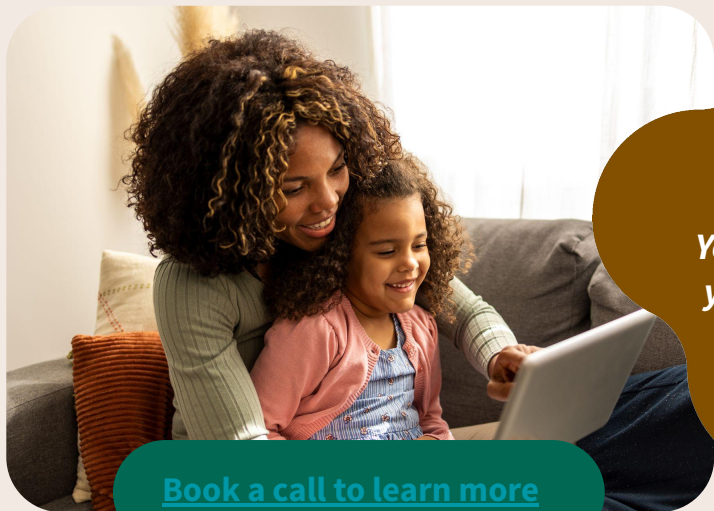
2024 Enrollment Marketing Guide

For Innovations Academy

Powered by
Niche Audience Insights

Your school year in review *on Niche*

You had a big year! Families are checking out Innovations Academy on Niche.



WOOHOO!
*Your traffic is up
year over year!*

[Book a call to learn more](#)

Families who are already
considering your school

616

Profile views
Aug 2023 - May 2024

48

Referral clicks back to
your website
Aug 2023 - May 2024



New Parents in
Your Funnel

How does *competition* shape up in your backyard?

Families are checking out
Innovations Academy
on Niche.



Your Niche Audience overview
for last school year
Aug 2023 - May 2024

*Reach families who are
already considering you*

616

Profile views

48

Clicks on your profile links

But they're also researching
your competition.



70,560

*Views of charter schools in
the San Diego Area
Aug 2023 - May 2024*

1,380

*Views of your peer
schools' profiles
Aug 2023 - May 2024*



24 schools in the San Diego Area partner *with Niche*

*Numbers reflect 12 month averages on a per school basis for this segment.
Before upgrade = 12 months before upgrade.
After upgrade = current 12 month pacing for partners.

BEFORE UPGRADING

Profile views	122,626
Total clicks	9,401
Apply clicks	—
Visit clicks	—

After upgrading

Profile views	181,388	↑ 48%
Total clicks	27,764	↑ 195%
Apply clicks	3,533	
Visit clicks	702	



Families find Niche early in their search

75% of our users come from the Google Searches you care about:



Actively searching for a school like yours

[best charter schools in san diego](#)



Actively considering your school

[Innovations Academy reviews](#)



[compare charter schools in san diego](#)



[Best places to raise a family](#)



Niche wins the only screen that matters.

60%
OF OUR TRAFFIC IS MOBILE

1000
DOWNLOADS/DAY
FOR NICHE APP



Recruit on Niche — Premium Profile

Showcase your brand and what makes your school unique.

UPGRADE YOUR [NICHE PROFILE](#)

- “From the School” section
- Apply, Visit, Learn More links
- Upcoming events
- Photos & video
- Spotlight Program
- Enhanced search listings
- No competing ads

Upcoming Events

MAR 12 **BAM! Saturday Workshop**
9:00 am • OC Campus
Lego Mindstorm Robotics Saturday, Mar [More](#)

MAR 16 **Class of 2026: Accepted Student Social**
12:00 am • OC Campus
Meet OC Administration, Faculty and cur [More](#)

Apply NOW!



We are still accepting applications for OC's Class of 2026!

[Learn More](#)

NICHE Find a school or district... In Pittsburgh Area

School Search School Rankings Schools Near You Write a Review

ALL-GIRLS SCHOOL [Add to List](#)

Central School

[Apply Now](#)

#3 in Best Catholic High Schools in Pittsburgh Area

Overall Grade • Private, Catholic, All-Girls • 9-12 • PITTSBURGH, PA
★★★★☆ 418 reviews

A	A+ Academics	B+ Diversity
B+ Teachers	A College Prep	A Sports
A+ Clubs & Activities		

@oaklandcatholic.org About Oakland Catholic High School...

(412) 682-6633 [AP Offered](#) [All-Girls](#) [Catholic](#)

144 NORTH CRAIG STREET
PITTSBURGH, PA 15213 [High School](#) [NCEA Member](#) [Private](#)

Pennsylvania | Pittsburgh

Niche Partner Examples

[Goethe International
Charter School](#)

[Old Town Academy
Charter School](#)

[Oxford Preparatory
Academy](#)

Recruit on Niche — Sponsored Listings

Stay top of mind while families are active in their search.

Search Listings

Promote your school as families are searching for schools like yours

Sponsored

Niche Eastern Academy
Private School • SELLERSVILLE, PA • PK, K-12 • ★★★★★ 11 reviews

Parent: My stepsons have been attending Upper Bucks Christian School for many years, with the oldest about [Read 11 Reviews](#)

B+ Overall Niche Grade 190 Students
10:1 Student-Teacher Ratio

View Nearby Homes Virtual Tour Added Add to List

#2 Most Diverse Public Elementary Schools in Pittsburgh Area

Central School District
Gateway School District, PA • K-4

B+ Overall Niche Grade A+ Diversity
251 Students 13:1 Student-Teacher Ratio

View Nearby Homes Add to List

#2 Most Diverse Public Middle Schools in Pittsburgh Area

Washington Junior High School

How are grades calculated? Data Sources

Profile Listings

Promote your school to families viewing the profile of similar schools

Pacific School
HONOLULU, HI • Boarding School • K-12

Learn More >

Added

Your Ad Appears on a Peer School's Profile

Apply Now Virtual Tour

How are grades calculated?

Places to Live

Promote your school to families considering moving to your area

Sponsored

ALL-GIRLS SCHOOL
Central School

Private School • MALVERN, PA • 9-12 • ★★★★★ 83

Added

Pittsburgh

Sewickley
#21 in Best Suburbs to Live in Pittsburgh Area

A Overall Grade • Suburb of Pittsburgh, PA • ★★★★★ 26 reviews

How are grades calculated? Data Sources

A Overall Niche Grade

The Niche Audience

AUDIENCE YOU CAN REACH



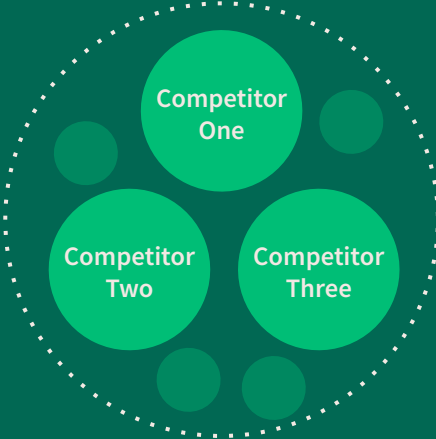
Only the people that make it to your website

YOUR SCHOOL'S NICHE AUDIENCE



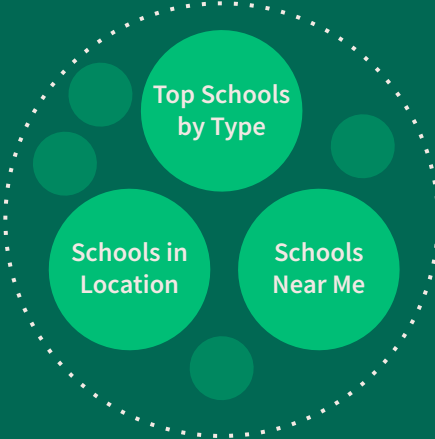
Interested in Your School

+



Interested in Similar Schools

+

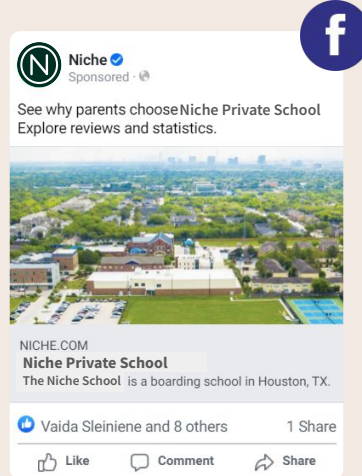
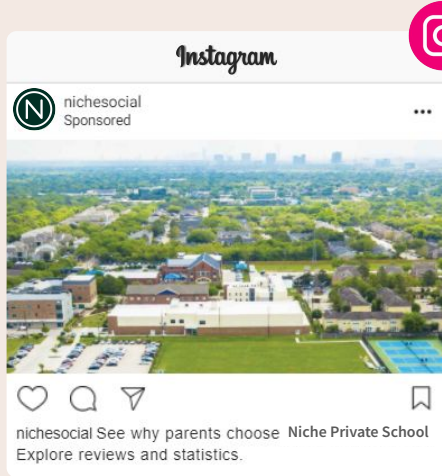
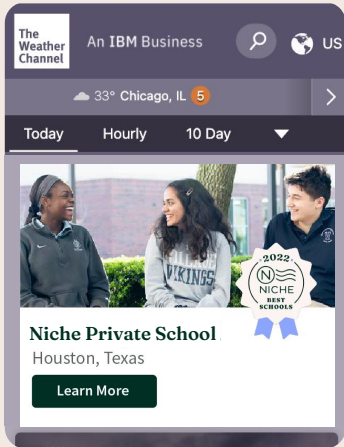


Searching for Schools Like Yours

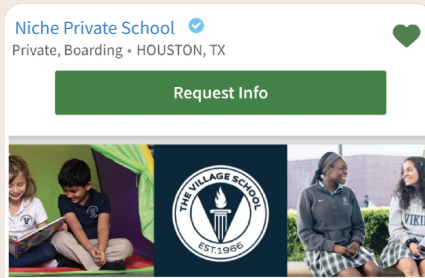
Reach families actively researching schools like yours.

Display & Social Remarketing

Reach families who are interested in schools like yours on the platforms they visit the most, including Facebook, Instagram, and Google Display.



Nurture families by driving them to engage more with your Niche Profile.



From The Niche Private School

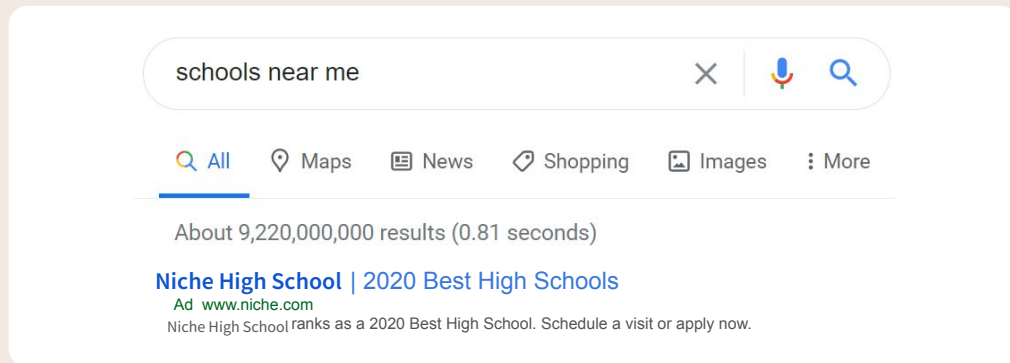
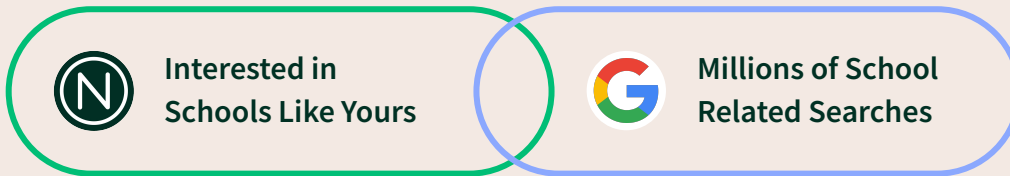
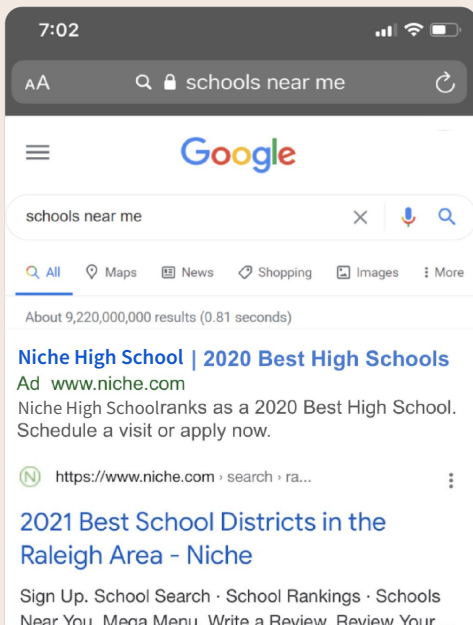
The Niche School, founded in 1966, has a tradition of rigorous and highly personalized learning paired with hands-on innovative methods of teaching. Located in the Energy Corridor of Houston, Village offers an American educational experience to its diverse and international student body who represent six continents and more than 80 countries. The Niche School is known for its excellence in math and science and has a collaboration with The Massachusetts Institute of Technology (MIT) and The Juilliard School of Music, which enhances its widely recognized



Google Search + The Niche Audience



Niche will run ads in Google Search to prospects who have signaled interest in schools like yours. This lets you tap into the millions of school related search and specifically target families most likely to be interested in your school.



Targeted Promotions + The Niche Audience

Leverage Niche's Audience Remarketing to promote a specific event to prospective families. These can help drive attendance at upcoming virtual events and campus tours for families who are most likely to be interested in a school like yours.



Central School Open House

[Learn More](#)



Niche Academy Lunch & Learn

[Learn More](#)



Niche Catholic Virtual Preview

Learn why students refer to BIM as “home” & “family”.

Apr 23, 2021 | 6pm PDT

[Learn More](#)

What it Means to be a Niche Partner

[Read Partner Success Stories](#)

STRATEGIC SUPPORT

Dedicated Support

Your Partnerships Manager will support you throughout your Niche partnership, starting with onboarding.

Turnkey

We'll handle the rest — almost nothing for you to set up.

TRANSPARENT REPORTING

Quarterly Business Review

Meet with the Niche Team to review the performance of your partnership.

Transparent Reporting

Reporting to help you understand how users are engaging with your Profile and converting to your website.

- Partner Insights Report
- [Google Analytics Dashboard](#)

DATA & INSIGHTS

Niche Intelligence

Vast market data on every school and millions of students over 10+ years to help solve your challenges.

Partnership Recommendation

Recruit on Niche

- Premium Profile
- School Sponsored Listings - Search & Profiles
- Places to Live Sponsored Listings - Search & Profiles

Niche Audience Remarketing

- Display (On Niche, Google, Microsoft, Social)
- Places To Live Remarketing
- Google and Microsoft Search
- Targeted Promotions

Compete

2X Impressions of Reach



2x

2x

125K Impressions

\$6,250 Value



1x

\$9,989 Package Price

Multi-Year Pricing

\$7,990/year

w/ \$1,000 Multi-Year Discount +
10% Pay Upfront Discount

1 Year, Pay Upfront = \$8,990



Thank You

Please do not hesitate to contact me with questions!

Susan Speiser • susan.speiser@niche.com

NICHE[®] 

24-25 IA Family Outreach Parent Survey

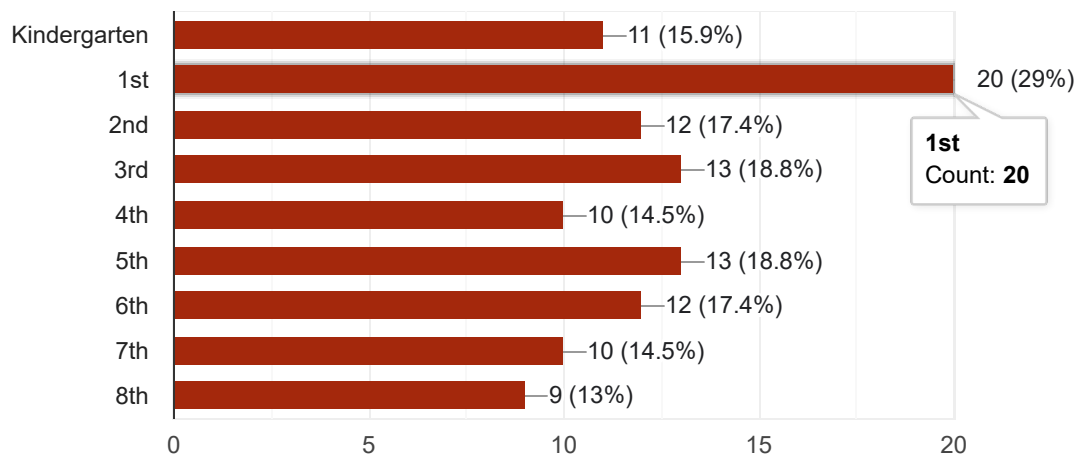
69 responses

[Publish analytics](#)

In which grade levels do you have children? (check all that apply)

 Copy

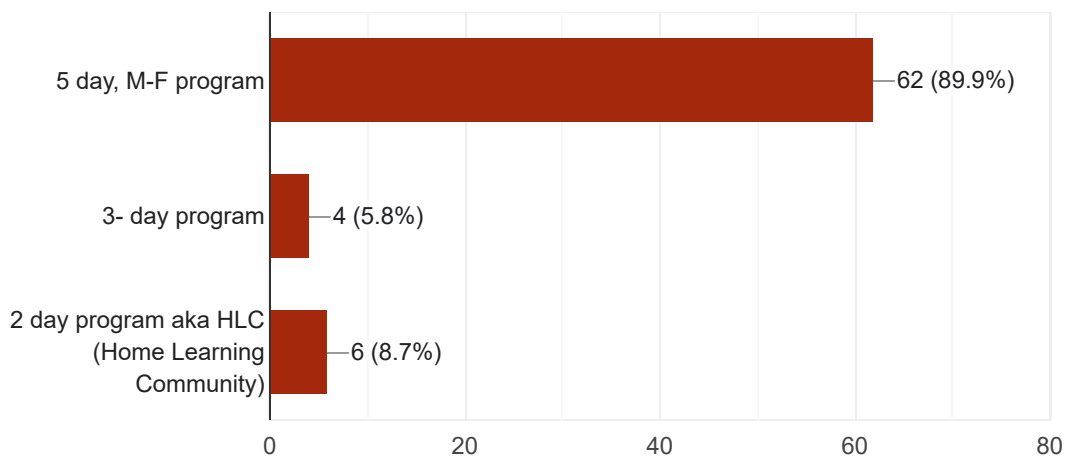
69 responses



In which program are your children enrolled?

 Copy

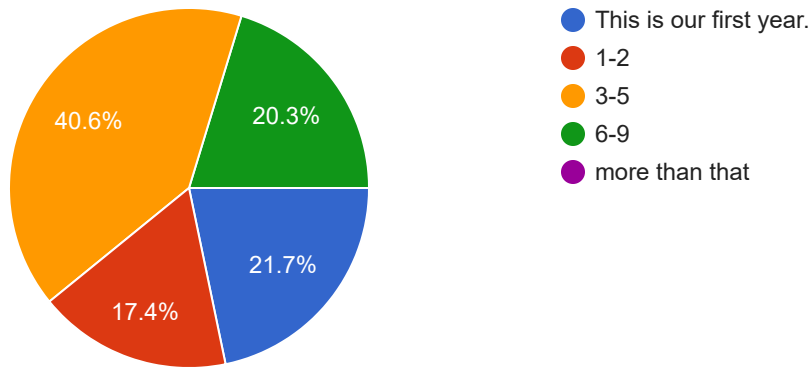
69 responses



How long has your family had a child at IA?

 Copy

69 responses



How did you first learn about IA?

69 responses

Google

Friends

Google search

Friend

Friends

Research

Internet Search

A neighbor

Champions

Searching for schools in San Diego

word of mouth from a neighbor

From a friend

The campus was in our neighborhood; friends attended

Other IA families

Charter list

From a work colleague who's kids went to IA during COVID.

Friend attending school

google search

heard from a friend

Homeschool group



Google search

Great schools website and location by work site

Neighborhood search

Searched the district site

My older son attended. We were not happy with neighborhood school and somehow heard about IA

Internet search

Google search for charters

Word of mouth

A friend

Google search on hybrid homeschooling programs

Internet

San Diego County charter school search

Neighborhood Facebook group

from friends

It popped up on facebook i believe? i was searching for hybrid homeschool programs.

From relative (Ava Kim's Mom)

Parents from IA

A person at church we visited who's kids went

Sign in front of school.

Charter School Research

Friend with kids at the school



Google search for public charter schools in San Diego

It was mentioned in a comment in a Facebook group

Researched online

Web research

parent I met whose kids attended IA

LEAP homeschool conference

Google

Searching. Own research.

Online

Neighbor

Online search for charter schools with arts programs

google search for homeschooling programs

Online search

Through current families/former families

Charter search

A friend.

Online

friend

Family member

Through friends who knew about the school. This was when the new location was being built.

Already answered

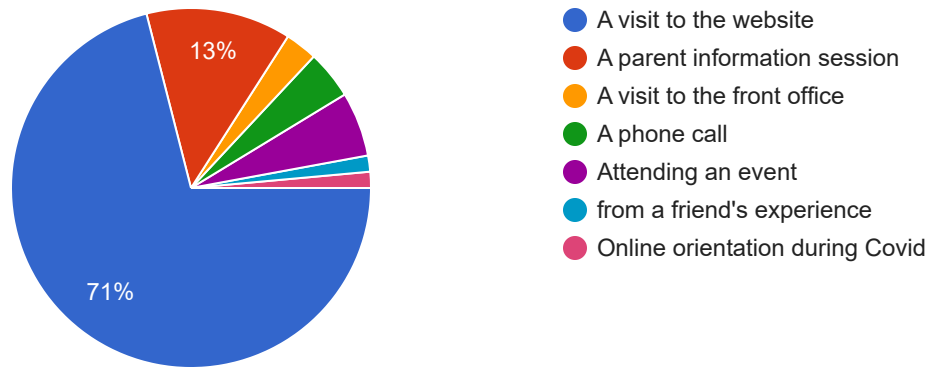
Friend recommended



What was your first experience with IA?

 Copy

69 responses



What actually brought you to IA?

69 responses

Our last school closed

Better education

Attending the parent info session and realizing the school vision aligned with our education desires for our son.

Covid, my son desperately needed in person learning.

Champions

Discipline approach, early academic standards

project based philosophy

The parent meeting and learning about project/inquiry based learning and SEL curriculum.

Project based learning, TA's in every classroom, monthly field trips, Monday make-up, explorations and electives

Project base learning, non-punitive, conflict resolution approaches, beautiful backyard - ultimately though, my child (heading in to 4th grade at the time) made the choice because they liked a lot of things about it.

Academic philosophy

Looking for a program for my precocious child outside traditional public School (just after we had moved to San Diego during the pandemic)

The environment, the focus on socioemotional development, and the fact IA was still doing in-person learning when all the other schools were completely remote.

Open during the pandemic

The way the school operates

the school system

3 day program with the mindset of the school



Needing something different for my child. A less restrictive, more creative and child centered environment

SDUnified was not meeting our needs

Project based learning and initial information session

I didn't like the non-charter options near our house

We were very impressed with the parent information session. In particular, the project based learning approach, hands on learning opportunities including field trips, and large variety of explorations classes that all students can participate in (as opposed to choosing one for the whole year). Spanish and PE are also a huge plus. Many of these programs are not available at traditional schools in SD county.

Positive discipline

SE based education

Explorations

We wanted project based learning and SEL programs for our kids.

Philosophy on website aligning with our beliefs around educations and kids well being

The project based learning style and the hope for a different flavor of classroom management than what you typically find in traditional public schools.

Project based, limited technology, k-8, connection w/nature.. great facility, high achieving, organized.

Smaller school

Info night/no home work policy/project based learning

I called the front office and asked for some information. They were very helpful at the time and it was the schedule and program that we were looking for and that made the most sense for our family.

Director's philosophy and principles

We liked what we heard and saw at the parent information session.

Avoiding standard public school



Another parent talked with me about what to expect at the school.

friend's experience

The passion for life long learning & commitment to social-emotional wholeness that the HLC teachers showed me. And then realized it was part of the whole school. I love how my kids are treated like whole human beings & given space to be themselves.

School (principal's) Educational Philosophy and how and when the sex education is done

Your small class sizes and awesome teachers

Social emotional curriculum, field trips with family, high value of family, three day program, and being accepted immediately.

Teaching philosophy, school hours, no homework policy.

I'm an educator, so I know excellence when I see it. Christine is absolutely an expert and a visionary, and all the teachers I've met have been incredible.

Reading Christine's bio and then a conversation with her

Doing a shadow day in the class.

The whole child approach, social emotional focus, positive discipline

Curriculum and ethos

I was first interested because of the 3-day program that was offered as we were just transitioning from homeschooling and Covid for Kindergarten. I thought it was great that IA had a homeschooling component. When I attended the parent info session, I loved the project-based aspect, the social emotional learning and positive discipline, and the enrichment activities offered during the school day

The presentation on how kids learn by doing
And are active through out the day

Academic level

dissatisfaction with local neighborhood public school; Christine's philosophy

the HLC

Terrible public school experience



The focus on child expression and emotional well being which is really important to us right now!

Covid and the learning program they offered at the time

Socio emotional curriculum, positive discipline, project based learning

We moved to SD for Rady Children's and we loved the values at IA

the community for homeschooling

Enjoyed the environment and project based approach to learning. Once we met the director and heard about the school we were sold. My son and daughter really enjoyed walking through the campus and exploring. They still do.

K-8, the social emotional program, no homework

Wasn't happy with our previous school

Social emotional and project based learning, we liked how calm and natural the kindergarten classrooms looked

Needing a better environment for my kids with IEP.

Project based learning and SEL

project based learning, positive discipline

Mission and values, and social emotional curriculum

The curriculum and the project based learning approach. The alternative approach versus the traditional education approach. We came from a Waldorf pre-school and this is where we first learned about other types of education available for our children. You may want to consider marketing in pre-schools (Montessori, nature school, Waldorf, Reggio Emilia, etc)

Already answered

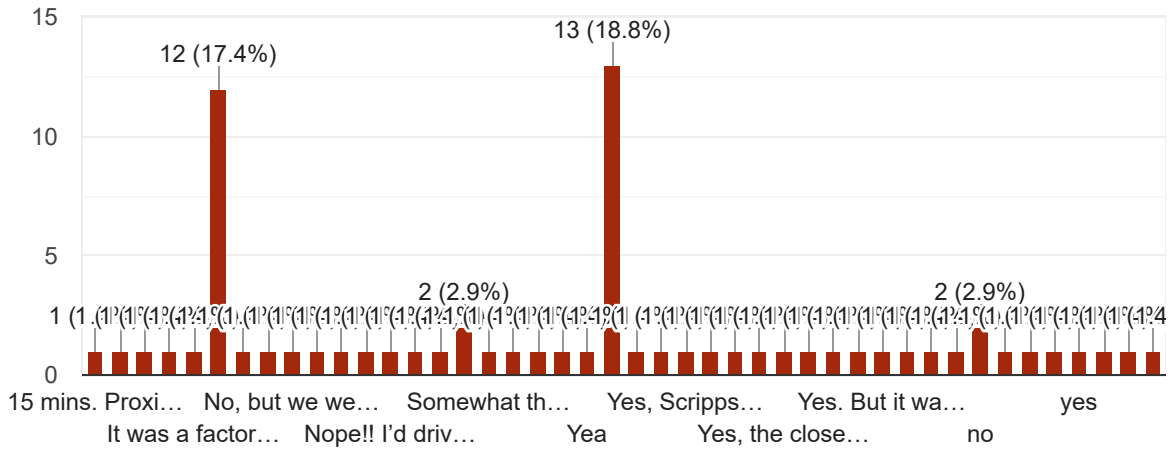
Project based and positive discipline



Did the distance you live from the school impact your decision to attend IA in any way?



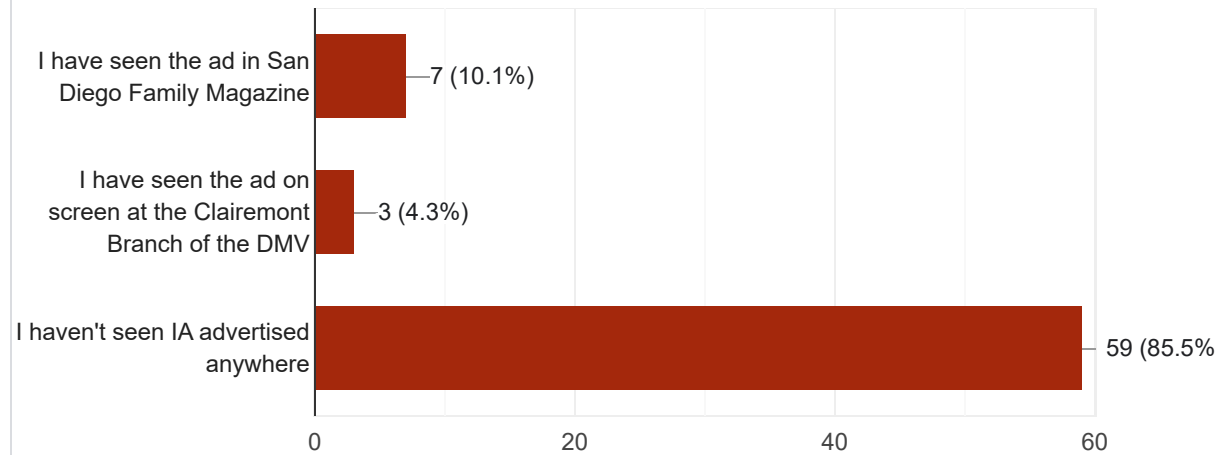
69 responses



Have you seen either of these IA advertisements? (check all that apply)



69 responses



What do you think would be the best way for us to get the word out about our school?

69 responses

Social media

Online advertising facebook/instagram/snap

Flyers

Advert or partner with local rec centers and public libraries

Billboards? Charter school websites, school choice fairs?

Social Media

Radio ads especially on npr

get some local media to write stories about cool things the school is doing.

Word of mouth, social media

Social media, word of mouth from happy families

Better online marketing through social media and other larger online platforms targeting local families

Advertise the 3-day program more with the homeschool community

Facebook advertising? ldk

A more updated website and advertising.

Advertise that you accommodate neurodiversity.

Local groups on social media

promoting more on social media

Social media

Word of mouth, positive reviews online

Commercial



Advertise at preschools if possible and via web search

I don't know but it would be good to get on greatschools.com so other parents know more about it

Honestly, positive word of mouth is the best. When parents and families are happy at IA and feel part of a community they will share their experiences with others.

Not sure

Maybe advertise with field trip shirts on field trip days

Google analytics paid search

Encourage parents to review the school online. I did a lot of research about schools and found reviews helpful.

Local farmer markets, festivals, and other community events in person

Localized Facebook / IG ads?

Word of mouth

Science event participation/ community event presence

YMCA, referrals, preschool feeder school that promotes IA

Flyers and communication at preschools

Community involvement

I don't have a suggestion at the moment

Hyper local Facebook ads can be done very inexpensively

Send advertising like weekly supermarket flyers to families within x miles from IA, encourage parents share their experience with other friends,

Word of mouth & tabling events

Instagram, social activities such as clean San Diego or marathons.

Social Media



Attend school fairs, incentives for parents to refer and reward past referrals, give parents tools to talk, fliers or business cards they can keep on their person, contact IA business owners and see what they can do, do an open house for businesses in a five mile radius where parents of kids might likely be. Make sure feeder high schools also advertise your partnership back

Find a way to tell parents that work in the neighborhood that there is a school here.

Neighborhood facebook groups

Social Media/Google advertising

Word of mouth. Maybe flyers to preschools or flyers at lical libraries.

Positive word of mouth

Social media, Instagram and TikTok specifically

Word-of-mouth is always the best. Perhaps parents posting about the school in related FB groups. I don't have other suggestions at the moment

Word of mouth, on line mom Facebook groups

Social Media advertising, billboards, bus, trolley.

sponsor reading events at local libraries; personal word of mouth

I only really know about homeschoolers, and I already tell all of them about the HLC.

Referrals is always the best way.

Maybe more social media presence?

Parents look at school ratings when they're looking to enroll their kids. The school is overall rating needs to increase.

Social media, neighborhood newsletters

Yelp/google reviews...not sure! :)

via parents, social media, advertise on the website some cool stuff you do

Social media, flyers at the library and in the community. Setting up a vendor booth at local events and visiting preschools or daycare centers.



word of mouth, community events

Word of mouth

Content families who spread information, organized and consistent follow through with new families, partnering with local preschools, representation at local events (festival booth, fair submissions, clubs that go to competitive events), empathetic and growth mindset attitudes (loving and welcoming to old and new families)

An advertisement in fleet and family on military bases.

community open house, or advertise in voice of san diego 'paren'ts guide to scools'

Parent testimonials

In pre-schools can be an early pipeline builder, on Facebook community groups about education in San Diego. A billboard on Clairemont Mesa Blvd near the school can help build awareness with families that work in the area.

Already answered

Search Engine Optimization (SEO)



Briefly tell us what you like about IA? (what gives you peace?, what keeps you here when the traffic gets you down? etc.)

69 responses

Its a small supportive environment

I stay because of my son's enjoyment.

Project based learning, willingness to tailor learning to skills and interests of the child, focus on whole child education

That my kids have a love for learning, can explore and have exposure to lots of interests and topics, hands on learning field trips and how the school values social emotional learning

I like the variety of activities IA does for the students.

Discipline approach, "extra" curriculums like art and nature studies

supportive environment for kids with social emotional learning integrated. Engaged parents welcomed on campus and in classrooms. dedicated teachers who create exciting learning for our kids. No homework gives our family time to enjoy being together. Positive discipline approach. Love the overall philosophy of the school.

Peace of mind my kids are happy and safe at school. They have a sense of community and belongings. They feel like they can be themselves with their peers without being put down. Teachers and staff are supportive and respectful. Their strengths are celebrated and weaknesses are challenged and are given an opportunity to grow. I appreciate that IA recognizes that everyone learns differently and gives each child the space to learn at their own pace.

Sadly, most of the reasons we came no longer are in practice. I have one child with a very positive experience and one who had a horrible experience at IA. I don't feel like my concerns were addressed appropriately and I now have a hard time recommending the school. My child who is still there has been fortunate to have fantastic teachers and classmates, which is the only thing keeping us at the school.

The HLC community is a huge draw for us (creative learning, diverse community members, open minded, kind). For the 5-day program - my kid is happy with their teachers and is enjoying learning; conflict is dealt with respectfully and aims to help kids learn about themselves and others instead of just punishing them; the performing arts program; the improvements to the middle school program.

3-day program, project-based learning



We love the positive discipline, project based learning, no homework, supportive environment. Kids say they love the electives.

I believe in the pedagogical philosophy of IA, and the extracurricular classes like Life Science with Mary, and drama with Natasha, and athletics with Coach, along with the awesome 2D and 3D art programs and of course Español. Also IA is a positive and family like environment, and I the fact IA collects telephones is awesome to keep the kids focused and engaged. The various field trips and the project based learning are also huge pluses.

The proximity between the hospital and police station, the attentiveness to emotional intelligence, and the ongoing support for neurodivergent kids.

It's feels like big family to me.

I like how teachers are putting best themselves to students and kids are learning from hands on experience rather than just textbooks.

The learning style, focusing on the children& not tests, having so much hands on learning & art/music&other creative classes

My kids love going to school. Learning is interesting, field trips are fun, explorations are great, problem solving mentality rather than punishments

Social emotional support and parent involvement

Explorative curriculum, positive discipline, and beautiful campus

My son really likes it there, and I really like the play area and how the classes are set up.

The teachers are fantastic! The PBL approach including field trips has been great. Plus all that I wrote above.

Emotional intelligence and mindfulness, excellent counselor on site

The approach in explaining the "whys" to children in the process of them learning their social emotions. You guys definitely finish tying the knot on where the strings of parenting sometimes come loose. This is why it's important for everyone to be on the same page. Sometimes for a child to hear the same process from someone other than their family makes they understand better.

Explorations, the teachers and TAs

IA has helped my children with social emotional skills. After the pandemic, they were really struggling to find the joy in learning again. Having the additional support and positive discipline from the staff gives us a lot of peace. It has helped them regain confidence in their



academic careers. Our kids enjoy learning again and have been able to experience some amazing learning experiences. They have made connections with wonderful friends and families here.

Many "extra" classes (2D & 3D art, performing arts, STEM, etc.), no homework, no exams, NO PHONES!, positive/respectful discipline.

The open and welcoming atmosphere for all. The project based learning style and field trips. The beautiful courtyard for the kids to play in.

For the small sample size we've experienced, my children feel held and challenged and they are having fun.

Smaller school
Conflict mediation
No phone policy
Field trips

Teachers feels like partners in raising kids - actually the whole school feels in partnership with raising our kids and influencing them for positive growth. Teachers are willing to be adventurous and brave in their field trips and creative learning with kids

The 3 day program and the ability to still be engaged with my kids learning, the school events and other parent involvement, the small class ratio and incredible teachers, the explorations they have. It's like no other!

It isn't SDUSD - because it gives teachers the freedom to bring their own unique strengths into the classroom and leverage the momentum of the students' interests to maximize learning across many facets (academic, social, emotional, physical, creative...)

My daughter loves it, I love hearing about her day on the drive home. Every day feels like this is the right choice for us.

Positive discipline, group work, field trips, large playground, community involvement, later start time

Projects, positive discipline, many enrichment programs that expose kids to many different experiences

I feel my son's teachers care about the kids, the school has school counselor (I also feel she cares about the kids) the school staff are friendly/nice, the school offers variety of classes not just focus on academy, the principal

How great my kids are treated! And that I get to be a part of what they are doing at school. the community is great. 6 years in & we can't imagine not being part of the HLC and IA in general!



I like the playground area, the garden / backyard and school's vibe.

The daily check ins with teachers, counselors and case managers when my son has a hard day.

Teacher investment in kids, extra support staff (IPEs), nature/playground, ceramics, Spanish, chess. project based learning. Guest speakers for kids. Supportive community. I am liking family days.

Also, that there was freedom to go on family trips, using forms when kids missed school to share educational activities and still get school credits, which I valued. But that my kid still gets to go on frequent field trips, even if I'm not allowed to attend, that is important.

Ultimately, alternative learning experiences are important to me.

The teaching/learning method it uses.

We know that our child is in the very best hands. Innovations is the best school in San Diego for us.

I appreciate the culture of fulfilling my childrens' needs and expanding their interests in different enrichment.

We love the HLC and the teachers at IA

I love the positive environment and creative projects. The special support teachers are fantastic.

Small class sizes, project based learning, socio-emotional curriculum, no cell phones on campus

My kids really enjoy going to school which is the most important thing to me! They have fun learning and being with their friends. They love their teachers. We love the project-based aspect, the social-emotional learning, the enrichment classes. The physical school building and outdoor play yard are beautiful and have great energy every time I walk onto campus. We love the mission and values of the school, the no homework in the younger grades.

I love that my son is able to learn with different modalities. He has had experiences with field trips that would not have been possible anywhere else. He has great teachers that care and love their work. They are always innovative and improving their craft.

Putting student individual relevance as a priority, building a community with families.

All of explorations are the best total enrichment around. We greatly appreciate the "no homework" approach. It eliminates a tremendous amount of stress and fighting over doing it and provides time for us to build Lego with the kids, read science magazines out loud to one



kid, take the kids to the zoo, and allow the kids to socialize with their friends roaming around the neighborhood. We love the fact that IA is truly a community and we have embraced that by becoming involved and very much a part of the community.

We are here for the HLC, and love that IA provides the HLC with access to classrooms and other "school" amenities.

The welcoming and open door policy, and How invested the school is in targeting different students needs to help the student thrive

My kids (esp 3rd grader) struggled for their entire academic lives. Unhappy and came home crying often. Didn't want to go to school. Not a single day have we had that experience at IA. We feel so welcome. It feels like a little family. We've only been there for almost 2 months and everyone knows us, the front office knows who my kids are when I come in. 😊 it's a beautiful feeling.

I like all of the programs that IA offers and comparison to the other schools. For the most part, the teachers have also been very good as well as the class sizes and regular field trips. As well as they're not being excessive amount of homework that discourage kids from wanting to learn. Also, it appears that all of the staff knows the kids well and truly support them.

Small school, everyone knows my kid, before and aftercare on site, positive discipline, hands on learning

Social emotional focus, no homework policy, arts, kindness, intrinsic motivation

The HLC teachers are amazing.

I feel at ease knowing my child will be educated and well taken care of. I really enjoy the electives offered aside from his learning in his kindergarten class. It is a well rounded program with much opportunity for growth.

IA does not focus on test scores and fundraising, which is a huge distraction from focusing on kids mental health. I love that we have real electives with certified art teachers, spanish is taught in elementary school, and the field trips are wonderful experiences for the children.

Small class sizes, proactive teacher

Positive discipline, growth mindset, strong relationships, field trips and other educational experiences, nature studies, plants in the play areas instead of just concrete

The staff. My kids like going to school for the first time. They say all the time they have school family.

Supportive and competent teachers and staff, communication and counseling



All of the enrichment - 2d and 3d art, spanish, nature studies - and project based learning

N/A

We LOVE the school and so do our kids and this is the main reason we are still here! The experience for our children, the positive discipline approach - we believe the world needs humans that think differently and this is what we have seen with our kids. They teach us so much about how to deal with conflict and how to talk through problems. It has been a gift! The smaller environment/size of the school is also a big plus, the newer campus, the community, the no electronics/no cell phone usage approach, etc.

Already answered

Dynamic education, opportunities for parents to get involved, we only had amazing teachers, diversity, exploration classes!



Share anything you want in this space that will help us understand what we are doing well and where we are falling short. Thank you!

69 responses

More education expectations

No one ever answers the phone. Calling to make appointments, notify the school of changes, or scheduling a visit is a week long endeavor and impossible if it is time sensitive. Gate is scheduled to open at 8:00 and never opens on time, set to close at 8:30 but is never open till then, it is always closed early.

McKenna has been doing an amazing job connecting with and giving our son opportunities to be challenged. From the very beginning she showed individual interest in him, asking lots of questions and dedicating herself to offering him chances to be a leader.

You guys are amazing and are doing everything very well. Only thing I would like is an option for some homework, so I can have a better understanding of what they are working on in class and gauge my kids understanding of the concepts so I can help them if need be.

N/A

I love how attentive my kid's teachers have been regarding their progress, even when they were "behind" the curve

I wish there was a little more formal academic feedback. Sometimes it's hard to know where my kiddo is struggling.

I appreciate the teachers and staff at IA.

Need to improve with listening and responding to parent and student concerns in a positive and respectful way.

Need to improve with addressing bullying and student behavior that disrupts learning.

Sunday emails feel like lectures about parenting, rather than being helpful.

NA

Have employees help the flow of traffic and approach the VEBA office next door if they would let parents park there; the lot is ALWAYS empty

Obviously greater teacher retention would be a big boost! School wide communication is good, but individual communication could be better (like if my child gets injured or has to have a check in).



Check-ins for kids who have disagreements is good, but there have been some instances where there has been physical disagreements on a repeated basis, so much so that we know a family who left IA because of it. I do think there comes a time where a child or family should lose their IA privilege if the family or the child aren't actively and continuously working to end the physical lashing out towards other students.

I would love to see more support in the classroom for the teachers to deal with disruptions.

The view of educating kids is great, the fact that they need to come to the school when they are sick is not.

I like the idea that kids have to play so I strongly agree with no homework policy. one down side that my kids dislike about is school lunch. they told me couple of times that they found bugs and spiders in their food.

The focus of kid lead learning&hands on group learning is amazing. Would love to see 3 day program extended to higher grades

I think the teacher turnover and departing teachers having poor reports on administration has had a negative impact on the school. The families who have stayed on, have for a reason, but are hesitant to recommend the school to others due to inconsistencies. Also it seems that some good teachers move on (understandable to a degree, but I am aware of many who have left because of negative work environment), and some teachers who are widely disliked by families/students stay on for some unknown reason.

We enjoy having our kids attend this school

I like the emphasis on limiting screen time but feel this could be further emphasized in the classrooms, especially for the younger grades.

I can't get a phone call into the school. Any time I have called during normal hours, it just rings until it reaches voicemail (which is still set up for summer).

I think communication with parents needs work. It may come off better to parents if the tone of messages is more about building a healthy partnership between parents and the school to provide the best educational experience for students. This week's message was better in tone. More welcoming messages, especially at the beginning of the year would be nice.

Very happy with support for kids (emotional and behavioral). Less half with teacher turnover and not always willing to provide academic challenges.

We are so pleased with everything.

Field trips every month are great. More space for outside work and free time



I like the more academically focused and reduced amount of field trips this year. It is a great idea & think the planned trips are awesome. My daughter just returned from the Safari Park field trip was so inspired by the Biology lab. Middle school redesign seems to be going very well and is much more organized. A big improvement from our previous kiddos's experience at IA middle.

I think the Math programming could use some work. My kids both despise ST math. It progresses at a snail's pace and is not challenging. Both kids have said that Math is/has never been very challenging. I think the option for advanced Math should be should be offered sooner for those kids who are ready. It was so nice to have that option in 7th and 8th. Why not start in 6th or even elementary?

I am not happy about the new policy regarding absences and mandatory academic support. I believe the decision should be left up to the teacher to decide if the student needs support. If the student has an excused absence, makes up all applicable work/studies, and is in good academic standing in class, they should be eligible to attend their explorations/electives pending teacher approval. The explorations classes contribute to the overall learning and children should not be punished for being out ill or for another necessary reason. If there is not an actual academic need for extra support, they should not miss out of these extra learning experiences. Children who are doing the work at home and catching up after being ill/other have put in the academic time missed already. It is redundant and would definitely be viewed as a punishment for these students to miss these classes. My daughter has learned a lot from Mary's gross science class.

Retaining teachers has been an issue. And training up teachers to your special vision of education and discipline.

We love the access to classes like 3D Art and robotics as part of the curriculum. For the most part interactions with teachers have been respectful. I can not say that the after school program teachers rise to the same standard which is tough, though at the moment we don't have another option so we deal with it.

So far all seems well for my children. Was a little taken back that children have more access to their technology in class than expected. Like being able to use it for " filler" time is bothersome. I'd love to see creativity fill that space...

School could use more foreign language curriculum

I wish we had a bigger/easier parking lot!!

.

Great communication, fantastic whole-person approach, professional emotional support, solid academic program with quality teaching staff and enlightened direction. On-campus after school program is convenient but could use better programming and stronger oversight of children.



Communication is strong and the school feels like a community, which is fantastic.

The food seems to be lacking. I've only seen the sun butter/jelly sandwich, which uses cardboard bread. For the other meals, my kids are left mostly unsatisfied. That isn't all the fault of IA, but it is a bummer for this mom. My vegetarian kid claims her burritos have meat in them. I hope she is mistaken, but I am not able to verify. She ends up not eating much at all most days.

Mostly, we are enjoying our first year at IA!

Teacher turnover is my only thought regarding improvement. Kids are having a great experience. I worry new teachers won't understand positive discipline.

1. The school's front desk staff are friendly. 2. The school has an at site counselor. 3. The school has different elective classes. 4. The school has Spanish class and art class. 5. The school's hour fits my schedule and not too far from my place. This is my first year so I haven't noticed anything the school is falling short.

I'm thankful everyday my kids have a beautiful safe space they get to come to for community learning. There are very few places even similar to this program, in my opinion, & there's no way with 4 kids we could afford it if there was! Thank you!

I cannot find anything that are falling short. I think having many field trips are one of the good side of the school.

You guys are great!

Christine emails are long and extensive. But I actually thing she does a good job trying to impress parent responsibility onto the parents. Also I think the parent book library is also creative.

Field trips being unwelcoming for families to attend as a all-across-thr-board standard seems to do more harm than good. This is a first I've heard of this new protocol for IA, as if it existed last year, it wasn't used in our class. For example, why can't I meet my kid on their local bay trip?

Too many parents interested in going limits the chaperones. There is the amount they bring on the bus, and that makes sense. If there is limits to how many people are allowed by where you are going, that make sense. What doesn't make sense is when neither of these apply, are in a public place, and we are still unwelcome.

When chaperones are open to first come first chosen, the parents who become chaperones are those who have freedom to check the new email with their phone on them at all times. This doesn't allow for diversity in the parent chaperones. Essentially, whoever is a stay at home parent, with a flexible job, with no other kids are always the ones who can go. This builds up resentment rather than helping those with less privilege be with their kids. I believe fostering that environment is part of IA and what they proclaim to value so I find this new protocol



strange.

In addition, many parents can't take off work the whole day, or they have other kids to attend to, which is why they can't sign up to chaperone. That is why I always met my kids at the field trip site, if it is a public space or I can pay separately, which has never been an issue before. But even when we pay and drive separately to meet and are told we can't come....this goes against valuing parents even when the more parent support is helpful. This school rule is really limiting and frustrating, as for years I used to come even if not an official chaperone and help out. I get some places give a cap on how many can attend. But when that isn't the case, I think this is a damaging policy.

The new value on attendance also has been a hindrance. Family comes first, even if we do value attendance too. If there is a dying family member or the only way we can see grandparents requires us to take a day off of school, that will happen.

Or if my kid is sick. I also want other kids to stay home when they are sick as I am immunocompromised. When values become about attendance, some parents push for more school even when a child is likely too contagious to go. I've already gotten strep and COVID since the school year began from things my kids bring home.

It would be very helpful to have online forms to fill out when my kids are sick to give the school money. Doing it on docuform is much easier than trying to get it to the office.

However, I do like the sign out front about attendance as it is helpful to understand the value of getting kids to school and it is motivating.

Waiting in school pick up line and parking have also been issues, especially when I have been fatigued/recovering. There haven't been enough handicapped spots and they are either full or blocked.

Currently I don't have a handicapped pass and sometimes I haven't been able to attend school things because the parking won't be available unless it is a significant walk. I don't mind parking far away when I am well though. But this has been another issue, and something I have to plan around with a chronic illness that is challenging.

Great in my eyes - ask the students.

It would be nice to get more frequent updates from teachers.

I appreciate the lack of meaningless homework each and every day

No complaints right now

Na

STEM enrichment opportunities for middle grades seem to be non-existent. Consider partnering with collegiate student organizations to provide on campus STEM opportunities



(UCSD Project in a Box, Scripps Oceanography SWMS, etc)

The teachers are wonderful! They treat the children with respect and I see that when they treat the children with respect, they get respect in return. I love that it feels like a warm and inviting community, and not like a "kiddie jail" as some of the other schools in SDUSD feel. I do appreciate that doors are locked during the day, however. As much as I want it to be a welcoming environment, I do also want to ensure kids and teachers are safe from just anyone walking into the school. I love that parents are welcome to volunteer in many different capacities. I really also appreciate that the administration at IA really seems to try to keep communications, requirements, and events at a level that is manageable for families to keep up with. We have been a part of other schools where the parent expectations and events were overwhelming and the communication was not streamlined.

I would love to see the kids improve in spanish become more proficient.

All around great job

I would prefer less fundraising by the grade-level "asks" of things that my kids will pester/beg/ask for that I would rather not purchase but sometimes feel pressured to. Referring to things like bake sales, otter pops, hot chocolate, shaved ice, sky zone, etc. Yes, I participate and "encourage" these fundraisers by helping give/bake/donate/supply but then I also end up purchasing for my own kids. It's just too much money and too many individual asks. We pay for field trips & school supplies and that's fine.

I could really do without the frequent pontificating in the school messages.

Staff is great unfortunately some of the teachers are not as great making it a challenging decision to want to stay at this school or leave.

1 thing I've noticed is on the field trip I attended we didn't learn anything. We were able to walk around and look at things but as a mom I wasn't educated on what to even tell the kids in my group. When we went to the building with workers they didn't share much either. This was the Chicano park one. Secondly. The science program after school I sat in on one and the kids were shown how to do these project which were so so cute and cool but I'd love if they actually learned what the purpose of it was and the science behind the craft.

The short window to put in lunch orders. Parents should be able to sign up for a month or even year at a time and cancel the week before if there are days that the child won't need lunch.

Sometimes the school is a lot, over exaggeration of issues that happened between the kids at the school (Primarily last year). The lengthy messages with inaccurate information just creates a lot of unnecessary drama. Specifically, because I do speak with the other kids as parents after the incidents are brought up and what is relayed by the school does not align with what's relayed by all of the kids involved. This is probably my biggest deterrent And I am seriously considering changing schools. I think that It is done with the best of intentions, but that it is not effective. I wish I had this much communication about how my son is doing academically less communication about playground drama.



Monday half days, Monday a really bad day to be a half-day for working parents. I think half day should be on Fridays. Half-day Fridays would also probably improve the attendance rate . I also think that, that schedule is a really big factor on why people don't enroll their kid.

Everything above

We love the school and are so grateful! Ive been impressed with the thoughtful answers the kids give and their kindness/respectfulness. On the couple of field trips Ive been on, it seems like the ed specialists could use more support/education on polyvagal theory and tools for co-regulation with kiddos who are struggling.

We are happy with the HLC. We are flexible on other issues, we've been to the old school, moved to the new location, etc.

It's been great so far. I really like parent square and his teachers open door policy.

Keep with community focused/student led fundraising for field trips. Keep continuing field trips and overnight trips. Room for improvement: less disdain for the free lunch program, less shaming from volunteers who help with lunch. I get a lot of feedback from the children that they are denied forks or leftover food because it's "for kids who get lunch" and they are not allowed to get leftover fruit unless they ordered lunch - the fruit ends up sitting in the office at the end of the day. I come from a culture where food is available for everybody - if a child is hungry and wants an orange, give the child an orange. We'd rather throw away food on the principle that it was not specifically ordered for a child who signed up for lunch. We claim to be a waste free campus yet there's so much policing of this free lunch program that's meant for ALL CHILDREN. I would encourage volunteers/staff involved to talk to a school where the majority of the families live on poverty level income and see how they approach free lunch.

Opportunities for family involvement instead of just asking for money

Doing well: field trips, building community, trying to improve, happy students

Falling short: finding new teachers (need to be organized and have follow through to catch good ones), end of day tv time, hope and faith in the future of the school from admin, positive discipline in classrooms to standard of several years ago

I love this school. My kids feel seen and the 1st grade teachers are exceptional. Having a kid in both Riley's and Sarah Beth's class and seeing them work together to make the twins comfortable has been amazing. The IEP teams and the classroom TAs are brilliant.

The new absence policy is not aligned with what we enjoy and come to IA for. It's perceived and constructed as a punishment and doesn't offer flexibility for the families that come here. Teacher turnover is a constant issue; it's happening in many places, but this is every year at IA we are losing good teachers. We should have an effective exit survey/interview to find out why teachers leave. Unprepared teachers (Savannah said she has no project based learning



experience, and there are 0 field trips planned for 7th grade for almost two months, simply because “we’re new”).

My biggest concern is teacher turnover and morale.

N/a

Please keep doing what you are doing! The school is wonderful and what you are all doing for our kids is so unique and different and has already had such a big impact on them. We are VERY grateful to be at IA.

Something I forgot to add is at pick up time if there would be a way to have everyone in just one line and not have people trying to turn left into the school would be great! It’s a huge trigger for me lol. We are all there waiting for 30 minutes and then someone pulls up and gets to cut everyone. I feel like those people have zero social awareness 🤔 it’s not hard to go down and make a U-turn to get in line with the rest of us.

Our family loves IA



And finally, what would you like to add to IA if you or we could?

69 responses

High school

Financial education. Debt to income ratios, budgeting, overall financial literacy.

We're still new, so nothing to add yet.

A free after-school care such as primetime, and chrome books that can come home for online lessons at school like st math and ixl math. These are the only 2 things that public schools have that are not offered here.

A normal slide

It would be nice if spanish was introduced a little younger.

more after school paid options like HeartLight Dance, Spanish, Soccer Shots, etc.

No comment

N/a

More parking (pipe dream of course but I think it's a common wish amongst families)

Extend the 3-day program beyond 2nd grade

In school band and choir classes would be great. I would also love team sports for middle schoolers with the chance to play against other schools (especially since other schools play in our gym). Kids say a real playground would be good, and also a shade structure over the gaga pit.

High School :)

A stop light or crossing guard to stop 2 way traffic during pick up and drop off

Sanitizer stations throughout the school.

more parking spaces during school events

Extending 3 day program past 2nd grade.



-Team sports for middle school
-more parking! (Not sure how:())

I cannot think of anything at this time

High school!

More feedback from the teacher. I know it's a lot of work, but even just knowing if he had a good day or not helps me.

I think I has made a lot of really good changes in the middle school level to Knowledge The developmental difference between middle schoolers And elementary school students And ASB or committee for school volunteering might be nice.

My son says the water fountain water tastes terrible.

I would really love to keep the new alternative PE class with Natasha. I love love love there doesn't have to be one set way to receive physical fitness, and for the kids to learn this at this age it is such a healthy outlet for them ❤️

Music and library (as explorations) and sports teams (after school)

More stem opportunities. Tinker room, coding, robotics, 3d printers, etc for middle school especially. I know IA has some of this happening but I feel that there is a lot of room for improvement here.

More free play time.

More after school classes.

Life skill classes during school (sawing, sewing, simple electric circuits, hammering nails, drilling, money management, cooking, etc.)

For an elementary school, it feels quite robust. I'm not sure I would want to add anything else.

Spanish for ALL grades and music for 4th and up.

Dedicated parking structure

Somehow more fundraising for field trips that doesn't involve parents still having to spend money at events in order to offset field trip costs.

Sports teams

Would love to see expanded after-school (tuition-based) options on campus like athletics, music, dance, drama, optional academics, activity clubs, etc offered by quality instructors. (Wish I could build/coordinate that but I need my current job!)



N/A

Dance program (unless there is one that I haven't seen info about yet)

Options for lunch that do not require ordering ahead. Consistency among teacher communications. A couple of past teachers did not send weekly messages to parents regularly or did so with little information.

Not now because this is my first year

not at the moment

I wish there are more educational after school or before school programs

A way to view missing and or Incomplete assignments so I can help get my kid caught up at home

A parking garage. Parent seminars on internet safety, child exploitation, social good. Free music classes. another therapist as the one you have is spread too thin.

Overall though, I think IA is doing great with what they have.

Great in my eyes - ask the students.

A sports field, but I know that's impossible.

Middle School Sports teams

More parking of course

Na

Data, technology, and cyber security literacy

More after-school activities!! Sports, Spanish, different clubs etc. I don't mind paying for these activities, I would just love the convenience (and an extension of the IA community) if they were offered at IA like other schools. I would also LOVE if Spanish was offered to the younger grades.

Chess club?

Interactive play area for the older kids

We can't think of anything



Parking ;)

Possibly a yoga class/meditation period to help self regulate little ones and ground them

I can't even think of anything right now! ❤️

Team sports for the Junior high aged Students.

More after school clubs specifically on Mondays, when there is a half-day, the parents could still pay additional to fund the clubs. It would be nice if they are skill building clubs, like coding, Music, Sports, Spanish etc.

Unsure

Spanish language class for younger grades, music class (instruments or choir)

I recall you had a great Spanish teacher at the old school who had the classroom close to the HLC rooms; maybe he's still at IA - it would be great to have him teach some Spanish to the HLC kids, too.

A larger playground for the kindergarteners. Maybe a swing or climbing gym.

a dedicated, paid traffic coordinator at drop off and pick up.

More after school enrichment options

Safer traffic, more outdoor time, innovative end of the day activities during pick up

Sports and more lunch options.

Honestly wish we had a better location with more outdoor space, but I know that's not possible at the moment. Perhaps more elevated and rich project based learning curriculum

a library (and librarian), or more integrated music

More support for children

Please continue to educate the families at IA about what the school does, what makes it unique. For middle school, please include/provide more meetings, more information sessions, and overall more information to the families so that some of them don't leave after 5th grade.

Already answered

An expressive arts therapy based program to reinforce the kids ability to get in touch with their



feelings in a healthy and natural way.

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Google Forms





Board Report Updates 10/17/24

- **Middle School Redesign**

The middle school redesign included the addition of independent work time, integration of electives into project work and making consistent middle school schedules. All middle school students have two academic teachers with integrated support from a teacher assistant, elective teachers and special education teachers. They also participate, based on work completion, in seminars on Fridays which include. They have mixed grade level (6-8) advisories. 2x per week, classroom meetings 2x per week and a seminar 1x per week.

- **Enrollment**

Enrollment came in low. I feel there is a real need for marketing. We are seeing a trend in middle school students leaving because their parents feel they need to “prepare” for high school. We are also seeing a decline in enrollment in our Kindergarten classes that may be related to the fact that we don’t have a pre-K or TK program. Our recent survey (see marketing portion of meeting) showed that most people heard about IA via word of mouth (friends, family, neighbors..)

- **Attendance**

Our attendance is improving with staff and students. We implemented a plan this year where students stay in class instead of attending electives on Monday (a one hour selection they make quarterly) if they were absent the week before. The goal is to provide them time to get information they missed when they were absent. This is not a popular plan among some parents, but it seems we have drawn attention to our belief that it is important to be present at school.

- **Audit Finding:** Report of our 23-24 audit and the finding due to missing children’s signatures on IS master agreements.

We made a big mistake last year in a supposed switch to Docu-sign. The child’s signature line got left off the form. Our two options are to take the finding and pay back the ADA for our independent study students for the year OR appeal the audit finding

“To appeal an audit finding, a charter school can either file a Summary Review, which is informal, or a Formal Appeal, which includes a hearing, with the [Education Audit Appeals Panel](#) (EAAP). While a charter school is not required to file a Summary Review before filing a Formal Appeal, filing a Summary Review will delay the deadline to file a Formal Review. If the charter school is unsatisfied with the

decision of the Summary Review, it can file a Formal Appeal to potentially get a different decision.

From the EAAP web site, here is the information about the Summary Review Process:

Summary Review

The LEA may request a summary review of audit exceptions on the grounds of substantial compliance. Substantial compliance means nearly complete satisfaction of all material requirements of a funding program that provides an educational benefit consistent with the program's purpose. A minor or inadvertent noncompliance may be grounds for a finding of substantial compliance provided that the LEA can demonstrate it acted in good faith to comply with the law and/or regulation necessary for apportionment of funding.

The summary review process is voluntary and informal, does not involve a hearing and is not subject to the provisions of the Administrative Procedure Act. For exceptions involving amounts exceeding \$750,000 or 150 units of average daily attendance, waiving or reducing the reimbursement or penalty also requires written approval of the Department of Finance and the Superintendent of Public Instruction.

If the conditions for finding substantial compliance are not clearly met or involve substantial questions of fact, and the Executive Officer denies the request, the LEA will then have 30 days to initiate the formal appeal process.

- **Charter Renewal 25-26**

Next year we will be renewing our charter. My goal is to have it done by summer 2025 to be one of the first schools to get it submitted.

- **LCAP:** see LCAP page in board packet

- **New application/lottery/enrollment system**

Innovations Academy is switching to Powerschool to make the enrollment process easier for our front office staff. Instead of using EasySuite and Powerschool and trying to get them to work with each other, for our lottery for next school year, we will implement Powerschool for the whole process from application to lottery to registration and enrollment as well as continue to utilize it for a student information system. We do not feel Powerschool is ideal as a SIS or lottery program, but we need time to explore such a large change. We have looked at several other options and are will begin to research the use of Oasis, a smaller lottery/enrollment/student info system for the 26-27 school year that has been recommended to us.

- **23-24 District Site Visit Report**

The site visit is attached. Our comments are on the last page.

BOARD MEMBER SEARCH

Nonprofit Board Exchange

<https://npboardexchange.org/board-listings/>

Volunteer Match

<https://www.volunteermatch.org/>

24-25 LCAP GOALS IN BRIEF SHEET

Goal 1 Use academic assessment data to improve instruction for all students and provide targeted intervention for struggling students.

- 1.1 Streamlined Assessment Plan ; 1.2 Support for Academic Instruction; 1.3 Data Analysis, Reflection and Tracking, meetings analyzing student data monthly then putting that data into a doc and tracking student goals in that doc; 1.4 Intervention Plans Prof Dev for teachers whose students are not meeting goals

Goal 2 All students will be engaged in academically challenging, inquiry-based learning within classrooms effectively managed by highly qualified teachers using intentionally designed behavioral interventions and supports.

- 2.1 Incident Tracking for Behavior; 2.2 Portfolio Protocol and Report Cards; 2.3 Middle School Redesign; 2.4 Professional Development

Goal 3 Provide high-quality, standards-aligned materials, resources and a facility to students and teachers to support their intellectual, physical, emotional and social well-being.

- 3.1 Two resources per subject area to support instruction, training for new curriculum, building project library, critical thinking resources and training. Beast Academy implementation K-5; 3.2 Field trips, experts and enrichment; 3.3 Facility Costs (obvious: all utilities, repairs, maintenance...); 3.4 SEL Curriculum; 3.5 Teacher Salaries and Benefits

Goal 4 Provide ongoing analysis, accountability and intervention support for chronically absent and tardy students and their families.

- 4.1 Whole School Absence Communication; Absentee Follow Up (tracking, phone calls, meetings); Absence mandatory work time (1% of TA salaries); Teacher/Staff Attendance

Goal 5 Provide multiple engagement opportunities for parents through effective communication tools, parent participation opportunities and parent education.

- 5.1 Parent Communication via Parent Square involved quarterly financial and LCAP updates, parent education information and school information. Teachers with weekly communication including school events and how to help their child educationally by sharing class information about content; 5.2 Parent Education through Events Two Exhibition Nights with parent education via portfolios and other opportunities, 2 Positive Discipline classes for parents, Open House as a time to both view classrooms and participate in education opportunities. The associated costs for this might include salaries for staff to help with babysitting, leading topics, as well as purchasing food and drinks for the events; 5.3 Parent Connection working together with IA staff.



Charter School Name: Innovations Academy
 Date of Site Visit: February 13, 2024
 Contact Person(s) for this Report: Tiffany DeGraffenreid, Joanne Lin-Hening and Richard Farace

San Diego Unified School District (“District”) is the charter granting authority of Innovations Academy (“Innovations”), a charter school operated by the nonprofit public benefit corporation of the same name. Christine Kuglen is the Director. Innovations serves grades K-8 and is located at 5454 Ruffin Road 92123, a District-owned facility within the attendance boundaries of Kearny High. The charter term for Innovations began on July 1, 2018, and ends June 30, 2026, based on the extension in Education Code section 47607.4.

The following staff members held the designated roles for Innovations in 2023-24:

Special Education Administrator	Lisa Smith, lsmith@innovationsacademy.org
504 Coordinator	Devon Woodruff, dwoodruff@innovationsacademy.org
Homeless Liaison	
Title IX Coordinator	Christine Kuglen, christine@innovationsacademy.org
Uniform Complaint Policy Contact	
Free/Reduced Price Meals Contact	Domi Talau

The table below summarizes enrollment by grade level at Innovations. The District notes that Innovations has shown a decline in enrollment for the past three school years. At the time of the site visit, 54 students, or 12.4 % of total school enrollment, are enrolled in the “Home Learner Community,” an Independent Study program.

Innovations Academy Report (37-68338-0118083)

+ Report Description

+ Report Options and Filters

Academic Year	Total	Grade TK	Grade K	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8
2023-24	434	0	37	47	56	50	55	59	41	42	47
2022-23	467	0	43	57	55	56	58	45	51	56	46
2021-22	472	0	45	49	58	60	47	60	58	48	47
2020-21	412	0	40	57	46	46	49	50	55	43	26
2019-20	385	0	45	45	46	42	55	54	45	27	26
2018-19	408	0	49	47	50	52	53	47	34	27	49
2017-18	363	0	33	44	44	50	46	35	26	42	43



The table below summarizes Innovations enrollment by subgroup. The District notes an increase in socioeconomically disadvantaged students in 2023-24. The schoolwide percentage of students with disabilities at Innovations increased from 15.0% in 2020-21 to 24.0% in the 2023-24 school year.

Subgroup	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
English Learners	3.9%	3.4%	3.2%	2.8%	3.9%	4.6%
Foster Youth	0.2%	0.0%	0.0%	0.4%	0.0%	0.0%
Homeless Youth	0.0%	5.7%	0.0%	0.0%	0.0%	0.0%
Migrant Education	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Students with Disabilities	19.6%	16.9%	15.0%	18.2%	18.4%	24.0%
Socioeconomically Disadvantaged	25.2%	30.1%	30.1%	26.5%	19.9%	29.7%
All Students	408	385	412	472	467	434

Operations

Innovations’ enrollment information is accessible via the “Admissions” tab on the charter school website <https://innovationsacademy.org/admissions/how-to-apply/> (last visited June 23, 2024). The “How to Apply” page includes information about the 2-day, 3-day, and 5-day programs provided at Innovations. The page also includes dates and times for parent information sessions. The Charter School Complaint Notice required by Education Code section 47605 is available on this webpage. *For the 2024-25 site visit, the District requests the charter school authorizer email listed on the complaint form be updated to charteroffice@sandi.net.*

The District received a 2023-24 Comprehensive School Safety Plan (“CSSP”) for review, which the Innovations Board approved on August 16, 2023. *The District requests that Innovations approve a CSSP by the annual March deadline, and then update the plan by October of the current school year. The District also requests that Innovations remove any irrelevant references to the District from the plan.* For more information on the development, contents, timeline, and updates for CSSPs, please refer to the California Department of Education’s website on Comprehensive School Safety Plans (<https://www.cde.ca.gov/ls/ss/vp/cssp.asp>).

The Innovations Board approved an updated Independent Study policy on September 13, 2022, including updated language in accordance with Assembly Bill 181. The policy includes the following language regarding synchronous learning and live interaction:

- 4. The following plan shall be in place in accordance with Education Code Section 51747(e) for synchronous instruction and live interaction:
 - a. For pupils in transitional kindergarten through grade 3, inclusive, the plan to provide opportunities for daily synchronous instruction for all pupils throughout the school year by each pupil’s teacher or teachers of record shall be as follows: Charter School will provide opportunity for daily “office hours” for synchronous instruction with the teacher or teachers of record.

Independent study information is posted on the website at <https://innovationsacademy.org/parents/forms/>.



The District reviewed the professional development (“PD”) calendar and sessions submitted by Innovations for the 2023-2024 academic year. PD is held throughout the year. The calendar shows some PD dedicated to special education, project collaboration, and positive discipline.

Innovations provides disenrollment information to the District monthly, which includes the subgroups of the students disenrolled. Based on the information provided to the District, approximately 34% of disenrollments in the 2023-24 school year were students with disabilities. *The District requests that Innovations monitor disenrollments in the 2024-25 school year to identify the cause in the disproportionate disenrollment of students with disabilities.*

During classroom visits on February 13, 2024, District staff observed classrooms and facilities. All classrooms had appropriate emergency exit routes clearly posted. The facilities appeared clean and well-maintained. The District observed that menstruation products were available in accordance with the Menstruation Equity Act. A sign was clearly posted in the restrooms, including information on where to get additional products if needed.

District staff interviewed students, parents and staff at the site visit. Students reported working on project based learning in their classrooms. Teachers reported reviewing the LCAP goals and receiving charter board meeting updates. Parents reported participating in Parent Advisory Group meetings, Parent Connections (a Parent Teacher Association like group) and completing surveys related to the LCAP.

Academics

Below are the performance levels (color) by subgroup on the 2023 California School Dashboard.

Innovations Academy (San Diego, CA)

San Diego Unified

Reporting Year: 2023

This report displays the performance level (or color) for each student group for most state indicators except the College/Career Indicator (CCI). The CCI displays Status levels only for the 2023 Dashboard.

Note: Because the English Learner Progress Indicator reflects data for the English learner student group only, information on other student groups will result in an N/A (or Not Applicable).

Student Group Report for 2023

Student Group	English Learner Progress	Chronic Absenteeism	Suspension Rate	Graduation Rate	English Language Arts	Mathematics	College/Career (Status Only)
All Students	N/A	Red	Blue	N/A	Green	Green	N/A
English Learners	--	--	--	N/A	--	--	N/A
Foster Youth	N/A	--	--	N/A	--	--	N/A
Socioeconomically Disadvantaged	N/A	Orange	Blue	N/A	Green	Green	N/A
Students with Disabilities	N/A	Orange	Blue	N/A	Blue	Green	N/A
African American	N/A	--	--	N/A	--	--	N/A
American Indian or Alaska Native	N/A	--	--	N/A	--	--	N/A
Asian	N/A	--	--	N/A	--	--	N/A
Filipino	N/A	--	--	N/A	--	--	N/A
Hispanic	N/A	Orange	Blue	N/A	Green	Blue	N/A
Native Hawaiian or Pacific Islander	N/A	--	--	N/A	--	--	N/A
White	N/A	Orange	Blue	N/A	Green	Green	N/A
Two or More Races	N/A	Orange	Blue	N/A	Green	Green	N/A



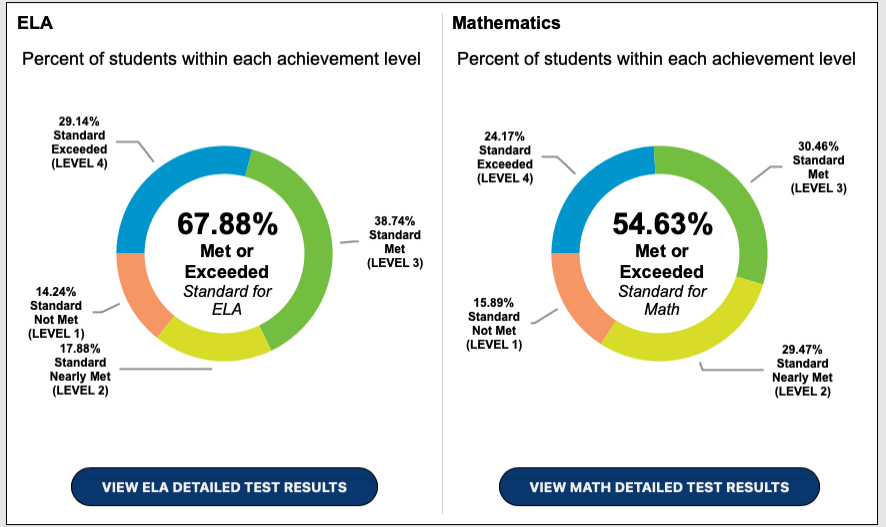
Below are the 2021-22 and 2022-23 California Assessment of Student Performance and Progress (CAASPP) results for Innovations.

School: Innovations Academy

CDS Code: 37-68338-0118083 | County: San Diego | District: Innovations Academy

Report Options

Year: Grade: Student Group: School Type:

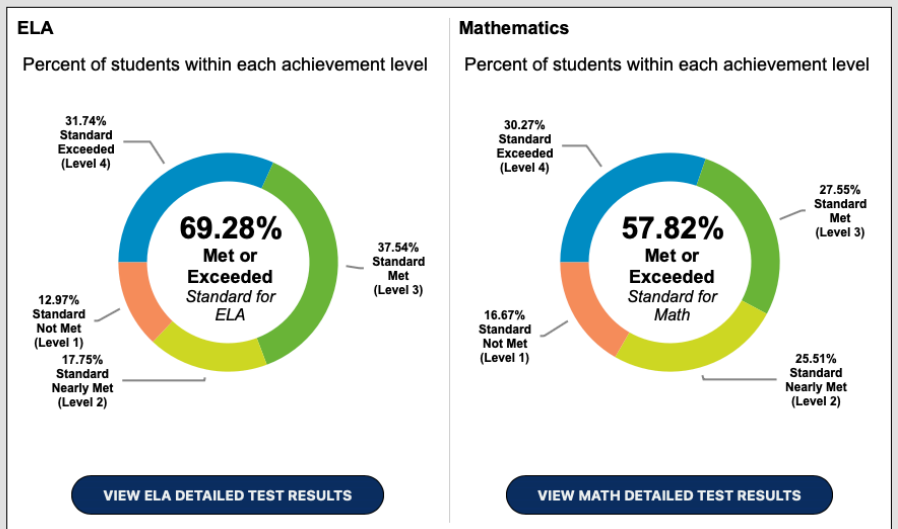


School: Innovations Academy

CDS Code: 37-68338-0118083 | County: San Diego | District: Innovations Academy

Report Options

Year: Grade: Student Group: School Type:





Assembly Bill 1505 amended sections of the Education Code regarding charter renewal which included specific information regarding verified data; see Education Code section 47607(b). For the District’s site visit, Innovations provided NWEA score reports for math, reading, language usage and science. The score reports show a Fall 2021 to Fall 2022 comparison. *For the 2024-25 site visit, the District will request publisher score reports that contain growth data from one academic year (fall to spring comparison).*

For the 2023 Dashboard year, the California Department of Education (“CDE”) categorized Innovations as “High Performing”. See CDE’s website at <https://www.cde.ca.gov/sp/ch/performcategory.asp> for more information about charter performance categories.

During the 2023-24 school year, approximately 104 students with disabilities were enrolled at Innovations, comprising 29.7% of its student population. Innovations is a local educational agency member of the El Dorado County Charter Special Education Local Plan Area (“SELPA”) and uses the SELPA forms. At the time of the site visit, Innovations reported zero students required services from a provider with a moderate/severe education specialist credential, and one student was placed in a nonpublic school setting.

Innovations reported having 24 students with 504 plans in 2023-24. Innovations submitted 504 documents on Innovations specific forms that included updated information for students, including the Accommodation Plans signed by the Administrative Designee, parent/guardian, student and a general education teacher.

The tables below summarize Innovations’ English Learner (“EL”) enrollment, including Long-Term English Learners (LTEL) and Reclassified Fluent English Proficient (RFEP) for the 2022-23 and 2023-24 school years.

School Year 2022-23

Grade	English Learners				EL Total	RFEP	Total (Ever-EL)
	EL 0-3 Years	At-Risk 4-5 Years	LTEL 6+ Years	EL 4+ Years Not At-Risk or LTEL			
KN	1	0	0	0	1	1	2
01	9	0	0	0	9	0	9
02	1	0	0	0	1	2	3
03	4	0	0	0	4	2	6
04	0	0	0	0	0	3	3
05	0	0	0	0	0	2	2
06	0	0	0	2	2	2	4
07	0	0	0	1	1	0	1
08	0	0	0	0	0	0	0

School Year 2023-24

Grade	English Learners				EL Total	RFEP	Total (Ever-EL)
	EL 0-3 Years	At-Risk 4-5 Years	LTEL 6+ Years	EL 4+ Years Not At-Risk or LTEL			
KN	6	0	0	0	6	0	6
01	3	0	0	0	3	1	4
02	7	0	0	0	7	2	9
03	1	0	0	0	1	3	4
04	0	2	0	0	2	2	4
05	0	0	0	0	0	3	3
06	0	0	0	1	1	1	2
07	0	0	0	0	0	3	3
08	0	0	0	0	0	0	0



The District reviewed Innovations’ English Language Development (“ELD”) program during its site visit. Innovations has an ELD Coordinator/Teacher who provides ELD services to all EL students. At the time of the site visit, Innovations reported less than 21 English Learners and did not meet the threshold requiring an English Language Advisory Committee. The District will continue to monitor Innovations designated ELD program to ensure that all EL students are participating in protected instructional time during the regular school day that is focused on ELD standards.

Governance

During the 2023-24 school year, the Innovations board met at 5454 Ruffin Road, 92123, generally at 6:00 pm. The meeting calendar included the following dates for 2023-24.

August 16, 2023	March 11, 2024
September 8, 2023	May 28, 2024
September 23, 2023 (board retreat)	June 18, 2024 (cancelled)
December 11, 2023	June 25, 2024
February 27, 2024	

Board meeting information may be accessed via the Innovation website at: <https://innovationsacademy.org/our-team/board/>. Board agendas are available and include the date, time, and location of the meetings. Innovations Board meetings are being conducted in person and members of the public may attend via conference call.

The 2023-24 Innovations Board is summarized in the table below.

Name, Contact Information	Designation	Term
Stephen Rosen, Stephen.d.rosen@gmail.com	President	Term expires January 2025
Danielle Strachman, board@innovationsacademy.org	Board Member	Term expires December 2025
Julia Stoer, julia@innovationsacademy.org	Secretary/Teacher	Term expires June 2026
Faraz Sharafi, IAParentRep@innovationsacademy.org	Parent Representative	Term expires January 2025

Access to board member bios and individual contact information can be found on the website at <https://innovationsacademy.org/our-team/board/> (last visited June, 2024).

Statement of Economic Interest (Form 700) documents were reviewed and demonstrated that Innovations has a practice of submitting this information on an annual basis. Where applicable, schedules identifying real property, income, loans, etc. were attached.



The District attended and observed an Innovations Board of Directors meeting on May 28, 2024. All meeting notices were posted in accordance with the Brown Act. The Board had a designated time for public comment, reviewed school finances, and had the Public Hearing for the 2024-25 LCAP at this meeting.

The Innovations Board of Directors reviewed and approved the Uniform Complaint Policy (“UCP”) on August 16, 2023, as part of the Innovations Student and Family Handbook. The UCP can be located on the Innovations website at <https://innovationsacademy.org/complaint-information/>. The Title IX policy can be found under the “Compliance” tab at <https://innovationsacademy.org/finance/>. The Title IX coordinator’s contact information and a copy of the Title IX training is posted on the website for public viewing.

The Innovations Board of Directors reviewed and approved the Homeless Education Policy on August 16, 2023. At the time of the site visit, the District could not locate contact information for the homeless liaison on Innovations’ website. *For the 2024-25 school year, the District requests that the homeless liaison’s contact information along with information regarding the rights and protections for students experiencing homelessness is posted to Innovations’ website in accordance with EC Section 48852.6.*

Innovations’ 2023-24 Local Control Accountability Plan (“LCAP”) can be accessed at <https://innovationsacademy.org/finance/>. The LCAP was approved by the charter board on June 27, 2023, alongside a presentation of the Local Indicators and the 2023-24 Preliminary Budget. The charter board held an LCAP public hearing on May 23, 2023. Below are the 2023-24 LCAP Highlights:

LCAP Highlights

A brief overview of the LCAP, including any key features that should be emphasized.

We have five main goals for this LCAP, which have been updated, but do not differ significantly from previous years because they are broad goals that address the needs of all learners, teachers, parents and guardians. Our main theme for these goals is to improve test scores with a focus on low income, foster youth, and English learners, so that our community is not threatened with closure of our charter at any point. We seek to improve the test scores of our students through a variety of ways that hold true to our hands-on, constructivist philosophy. We will do this by analyzing various data, supporting our teachers, offering targeted academic support (inside and outside of the classroom) to struggling students, and making sure we are setting classrooms up for success by purchasing necessary materials. We know that good teachers who are supported in their practice to work are of the utmost importance to a school, so we will continue to support teachers and will continue to review our salary scale to attract and retain strong teachers. We will continue to emphasize the importance of collaborating with students’ families to engage parents and collaborate on issues affecting our students. This philosophy resonates throughout the 2023-24 LCAP.

As a single school charter our LCAP also acts as our SPSA, providing a comprehensive and coordinated view of our plans for improving academic achievement and social-emotional health for all members of our school community.

The Innovations Board of Directors reviewed the mid-year LCAP report on February 27, 2024. The mid-year LCAP report contained all available mid-year outcome data related to metrics in the 2023-24 LCAP, and all mid-year expenditure and implementation data on all actions identified in the 2023-24 LCAP.



Finance Part One. This section addresses the charter school’s submission of financial reports in a timely and accurate manner.

The preliminary annual budget for fiscal year 2023-24 was submitted on time.	Met
The first interim financial report for fiscal year 2023-24, for the period of July 1 through October 31, was submitted on time.	Met
The annual audit for fiscal year 2022-23 was submitted on time.	Met
The second interim financial report for fiscal year 2022-23, for the period of July 1 through January 31, was submitted on time.	Met
The unaudited actuals financial report for fiscal year 2022-23, for the period of July 1 through June 30, was submitted on time.	Met

All Education Code required financial reports were board approved before the statutory due dates.

Finance Part Two. This section addresses the financial stability and sustainability of the charter school.

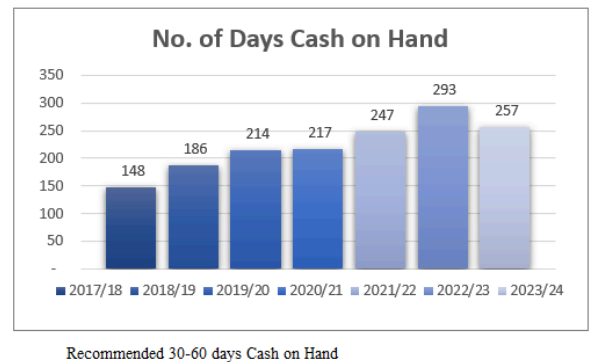
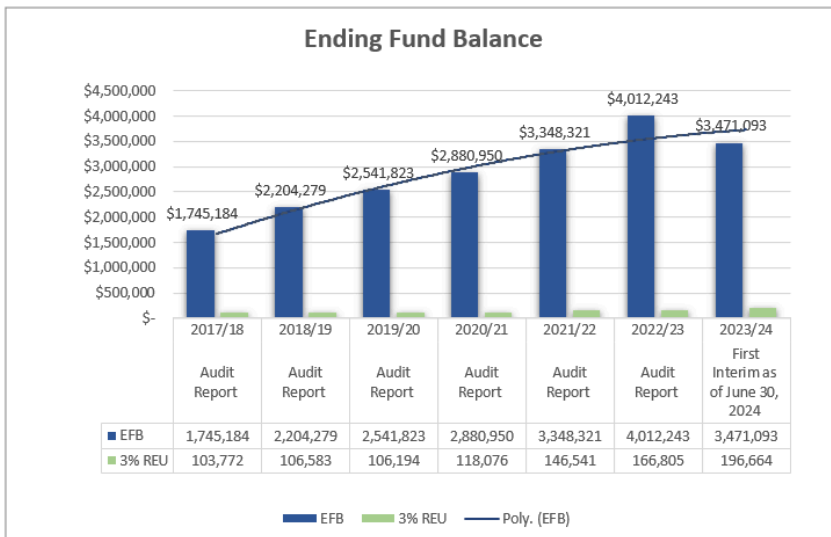
Innovations Academy 09237

Spending Trend | 3% REU

Source	Fiscal Year	A Beg. Balance	B Revenues	C Expense	Transfers In/Out	D EFB	E=D-A Surplus/deficit	E/C Percent Deficit	C * 3% 3% REU	REU Met?	Enrollment	ADA	ADA Rate
Audit Report	2017/18	1,761,511	3,442,726	3,459,053	-	1,745,184	(16,327)	-0.5%	103,772	Met	363	356.04	98.08%
Audit Report	2018/19	1,745,184	4,011,869	3,552,774	-	2,204,279	459,095	0.0%	106,583	Met	408	393.37	96.41%
Audit Report	2019/20	2,204,279	3,877,339	3,539,795	-	2,541,823	337,544	0.0%	106,194	Met	385	376.56	97.81%
Audit Report	2020/21	2,541,823	4,275,007	3,935,880	-	2,880,950	339,127	0.0%	118,076	Met	412	393.50	95.51%
Audit Report	2021/22	2,880,950	5,352,076	4,884,705	0	3,348,321	467,371	0.0%	146,541	Met	472	455.48	96.50%
Audit Report	2022/23	3,348,321	6,224,077	5,560,155	-	4,012,243	663,922	0.0%	166,805	Met	467	440.39	94.30%
First Interim as of June 30, 2024	2023/24	4,012,243	6,014,309	6,555,459	-	3,471,093	(541,150)	-8.3%	196,664	Met	437	412.05	94.29%

Current Ratio | Solvency | Cash on Hand

Source	Fiscal Year	A Assets	B Liability	C = A - B EFB	D Current Assets	E Current Liabilities	F = D/E Ratio > 1	G Total Cash	H = G - E Solvency	I Expenses	J = G/(I/365) No. of Days	K = G/I Cash Reserves
Audit Report	2017/18	1,841,963	96,779	1,745,184	1,800,296	96,779	18.60	1,398,481	1,301,702	3,459,053	148	40%
Audit Report	2018/19	2,280,548	76,269	2,204,279	2,248,881	76,269	29.49	1,811,964	1,735,695	3,552,774	186	51%
Audit Report	2019/20	2,665,455	123,632	2,541,823	2,468,003	123,632	19.96	2,076,903	1,953,271	3,539,795	214	59%
Audit Report	2020/21	3,273,360	392,410	2,880,950	3,110,310	392,410	7.93	2,340,882	1,948,472	3,935,880	217	59%
Audit Report	2021/22	3,952,636	604,314	3,348,321	3,793,568	604,314	6.28	3,308,610	2,704,296	4,884,705	247	68%
Audit Report	2022/23	5,474,649	1,462,406	4,012,243	5,346,668	1,462,406	3.66	4,469,107	3,006,701	5,560,155	293	80%
First Interim as of October 31, 2023	2023/24	5,049,205	1,465,836	3,583,369	5,049,205	1,465,836	3.44	4,608,134	3,142,298	6,555,459	257	70%





Based on the FY2023-24 First Interim Report, Innovations is projected to meet the District’s criteria of financial stability and sustainability with the exception of ending the year with an operating income. Despite projecting to end with an operating deficit of (\$541,150), Innovations’ ending fund balance is projected to be \$3,471,093, which meets the District’s reserve requirement.

Enrollment has declined 30 students from FY2023-24’s first principal apportionment compared to FY2022-23’s second principal apportionment. Innovations’ leadership attributes this to families leaving San Diego, including military families, as well as those who had initially enrolled during the pandemic but have since returned to their reopened neighborhood schools. The District questioned there being a waitlist despite the decrease in enrollment. In response, Innovations’ leadership explained that while they do reach out to individuals on the waitlist, they often do not receive responses, or the families assumed the waitlist was for the following year.

The cash flow is aligned with enrollment and is forecasting a deficit of (\$486,714). The District inquired on reasons other than enrollment that could be causing the deficit. Innovations’ leadership responded that the school’s facilities and building maintenance were trending higher due to the air conditioning continually going out, as well as the increase in utility expenses.

Per the FY2022-23 Audit Report, the school met the District’s criteria of financial stability and sustainability, and there were no findings and questioned costs related to the basic financial statements, or state awards.

Finance Part Three. This section addresses financial management topics.

<u>Chart of Accounts and Restricted Funding:</u> Chart of Accounts corresponds to appropriate Standardized Account Code Structure (“SACS”) compliant object and resource codes, as per Procedure 810, Charter Schools of the California School Accounting Manual (“CSAM”). Restricted funds are accounted for separately and expenditures are limited to those allowed by grantors.	Met
<u>Accounting System:</u> Accounting system utilizes a SACS compliant Chart of Accounts. Tracks unrestricted and restricted resources in order to meet various specialized reporting requirements and categorical activities. Provides data necessary for accurate completion of reports such as, but not limited to, those required by Education Code section 47604.33(a) (3-5), including, First Interim Report, Second Interim Report, and Charter School Unaudited Actuals Financial Report – Alternative Form.	Met
<u>Safeguarding of Assets:</u> The Fiscal Control Policy includes internal control procedures to protect their assets and prevent misuse of charter school funds.	Met
<u>Liabilities:</u> Loans, debts and outstanding obligations are properly accounted for and paid in a timely manner, as required by legal agreements.	Met
<u>Budget Development:</u> The staff, management, and governing board are involved in the charter school’s budget development.	Met
<u>Board Oversight:</u> The management and governing board regularly review the budget in comparison to actual revenue and expenditures and make necessary adjustments to the budget as new information is available to the charter school.	Met
<u>Adjusted Budgets:</u> The current fiscal year’s operating budget is updated for new revenue received and new expenses incurred.	Met
<u>Other observations:</u> As applicable.	See Below

Innovations contracts with Charter School Management Corporation (“CSMC”) for accounting and financial reporting services.



Article XIII, Section 36, Subdivision (e), Paragraph (6) of the California Constitution requires all districts, counties, and charter schools to annually publish on its website an accounting of how much money was received from the Education Protection Account (“EPA”) and how that money was spent. As required, Innovations reported FY2022-23 actual receipt and allocation of EPA funds on their website.

The current trial balance includes a balance of \$500 in the Petty Cash account. When the District requested documentation confirming monthly reconciliation of this account, Innovations’ leadership mentioned that there is no petty cash. Following the site visit, Innovations’ financial representative explained that the balance should be written off as the school no longer utilizes petty cash, and is a rollover from prior years. For the 2024-25 site visit, the District will review the school's accounts to ensure that Petty Cash has been properly written off.

Additional clarification was requested regarding \$1,556.42 recorded in accounts receivable under “Withdrawal—Innovations Academy.” Following the site visit, Innovations’ financial representative responded that the withdrawal transactions pertained to overpayments of payroll-related taxes.

The District inquired on the status of a (\$2,130) credit to Credit Card Payables that has remained on the balance sheet since September 2021. Following the site visit, Innovations’ financial representative clarified that it represents an overage and will be written off. For the 2024-25 site visit, the District will review the school's accounts to ensure that Credit Card Payables have been properly written off.

The transaction descriptions within the general ledger (“GL”) were detailed, except for credit card and Home Depot activities. The District requested that transactions include a more detailed description of the items and/or services purchased. For transparency purposes listing out some of the big-ticket items purchased allows those looking at the GL to know what is actually being purchased with school funds.

In reviewing the inventory list, the District recommended incorporating dedicated columns for purchase costs and disposal status. The District also brought to Innovations’ attention the discrepancies between the assigned location and the actual location of some items.



Charter School's Response (Optional)

CSSP

Innovations Comprehensive School Safety Plan was approved in June 25, 2024. We will update the plan by the end of October 2024. We will then review and update by March 2024 for the 25-26 school year and update again in October 2025.

Disenrollments

Innovations Academy is asking all parents who disenroll to share their reasons with us. They are not always honest and not always forthcoming but we will continue this effort. We have a disproportionate number of special education students compared to districts which could be a cause for this number.

Homelessness

The liaison's contact and the rights and protections for students experiencing homelessness have been posted here:

<https://innovationsacademy.org/parents/current-news/>

Regarding our Budget

Though this may not need to be included, our projected operating deficit for the 23-24 year, which was listed in the report, is different than our actual deficit. The projection was \$541,150 and the actual was less than \$90,000.

Petty Cash

We have let the district know that for several years, including the 23-24 school year, we did not manage any petty cash.

Inventory

We have added the suggested column to our inventory. Thank you.

Quick Guide to Brown Act Teleconferencing Options May 2024

The chart below summarizes key features/requirements of the teleconferencing options currently in effect under the Brown Act (California’s public agency open meetings law).

- The **“Traditional” Teleconferencing** column summarizes long-standing and ongoing features/requirements.
- The **“Just Cause” Teleconferencing** column summarized an option put into place by AB 2449 (2022). This option appears to be so complex and burdensome that CSDC believes the traditional option will be preferable under most circumstances except when it is impossible to properly post agendas or provide public access to remote sites.

We’ve also included [a separate table outlining the AB 361 option](#), which is only in effect during a state of emergency declared by the governor. As of this writing, there is no state of emergency declaration in California, but these rules would be an option should the governor declare a state of emergency.

This document is meant to summarize key features/requirements generally, but it does not address the complexities and nuances of the law and is not intended to offer nor replace legal counsel.

Questions	“Traditional” Teleconferencing ¹	“Just Cause” Teleconferencing
What are the effective dates of this option? Does it expire?	Long-standing statute, ongoing with no sunset date.	New in 2022, sunsets 1/1/26.
What authorization is required to use this option?	While there is no technical authorization for this, a best practice would be to have the local charter school board authorization for any cause. See footnote #1 regarding mandated teleconferencing for specified charter schools.	See “Cause” and “Board Approval” section below.

¹ This column summarizes general Brown Act teleconferencing laws. In addition, please note that Education Code section 47604.1 contains various mandated teleconferencing provisions for (1) single charter schools operating at more than one schoolsite, (2) governing bodies of nonclassroom-based charter schools that operate resource centers, (3) entities managing one or more charter schools in a given county, and (4) entities managing two or more charter schools not located in a single county. These requirements generally include offering two-way teleconferencing at each remote schoolsite/resource center, presumably requiring public access to such remote locations, and may include meeting within specified boundaries, etc.

Questions	“Traditional” Teleconferencing	“Just Cause” Teleconferencing
What are the rules regarding the agenda?	Address of teleconference locations and agenda posted at teleconference locations, as with all agendas. There must be a way for the public to participate at each location.	Must identify how the public may access meeting via internet, call-in, and in-person, must provide an opportunity for public comment on agenda as with all meeting agendas.
What are the requirements regarding a quorum?	A quorum must participate from locations within the agency’s geographic boundaries.	A quorum must participate at a single physical location within agency boundaries.
What are the rules regarding public access to the meeting site(s)?	The public must have access to the meeting sites – including the main location and all teleconferencing site(s).	The public must have access to the main meeting location but does not need physical access to remote locations.
What are the technology requirements?	Not specified, but presumably could include either phone or internet options and the public must be able to address the board from each teleconference location. As with all charter school board meetings, public registration or sign-in requirements are prohibited.	Must allow the public to participate through either 2-way audio/visual platform or 2-way telephonic and live webcasting. Remote board members must participate via both audio/visual. Must swiftly resolve requests for reasonable accommodations. If technology disruption occurs, the board may take no further action until public participation is restored.
What “cause” is required?	No specific cause for teleconferencing is required.	Board members may teleconference only if either for “just cause” ² or “emergency circumstance.” ³

² Includes (1) childcare/caregiving for child, parent, grandparent, grandchild, sibling, spouse, or domestic partner, (2) contagious illness, (3) physical/mental disability not otherwise accommodated (as defined), or (4) travel on official business of the board or other state/local agency.

³ Includes physical or family emergency among other things, that prevents a member from attending in person.

Questions	“Traditional” Teleconferencing	“Just Cause” Teleconferencing
<p>What advanced notification must a board member offer if they would like to participate remotely?</p>	<p>Provide notice to persons preparing the agenda with enough time to post the agenda with the identification of teleconference locations on the agenda.</p>	<p>Teleconferencing members must notify the board at the earliest opportunity, which may be at the start of a regular meeting, including a general description of circumstances for just cause or emergency.</p>
<p>Must the governing board approve this action?</p>	<p>Since the law allows this meeting option, no board approval is required.</p>	<p>For emergency circumstances, the board must approve the request at the beginning of the meeting. For just cause, the board does not need to approve the request to appear by teleconference.</p>
<p>Is there a cap on the number of times a board member may teleconference?</p>	<p>No.</p>	<p>Individual board members may use “just cause” option no for more than 2 meetings/year. Members may use “emergency circumstances” no more than 3 consecutive meetings, 20% of regular meetings a year, or 2 meetings a year if the board meets fewer than 10 times a year.</p>
<p>Are board members required to disclose the presence of other individuals at remote teleconference locations?</p>	<p>No.</p>	<p>Must disclose if other individuals age 18+ are at the remote location(s) and general nature of the relationship to board member.</p>

AB 361

AB 361 is another teleconferencing option, **but it is only in effect during a state of emergency declared by the governor.** As of this writing, there is no state of emergency declaration in California, but these rules would be an option should the governor declare a state of emergency.

Questions	“AB 361” Teleconferencing
What are the effective dates of this option? Does it expire?	During a state of emergency declared by the governor.
What authorization is required to use this option?	Must be (1) during the state of emergency with state/local social distancing orders, or (2) during the state of emergency with local board approval based on imminent health/safety risks—such as a natural or manmade disaster—and renewed every 30 days.
What are the rules regarding the agenda?	Must provide notice of how the public may access the meeting and provide comment in real time, meet specified time requirements, and must provide opportunity for public comment on agenda. Need not post at all locations.
What are the requirements regarding a quorum?	No requirement for a quorum to be located within agency boundaries.
What are the rules regarding public access to the meeting site(s)?	None, provided technology requirements are met.
What are the technology requirements?	<p>Must allow public participation via call-in or internet-based option, may require platform registration, must allow registration and written comment submission through the end of public comment portion of meeting.</p> <p>Must plan for technology disruption, no further action until technology issue is resolved.</p>

Questions	“AB 361” Teleconferencing
What “cause” is required?	See “Authorization” above.
What advanced notification must a board member offer if they would like to participate remotely?	None.
Must the governing board approve this action?	See “Authorization” above.
Is there a cap on the number of times a board member may teleconference?	None, provided authorizing requirements are met.
Are board members required to disclose the presence of other individuals at remote teleconference locations?	None required.

MARCH 2024 EDITION



California Charter School Laws and Regulations

a compilation of selected provisions



California
Charter Schools
Association

 Procopio®

What's New in 2024?

A Message from Myrna Castrejón

As we approach the end of this remarkable year, I am proud to reflect on the incredible achievements and unwavering dedication displayed by our charter schools across the state. In the face of significant opposition, we have stood firm in our commitment to protect our schools and ensure a high-quality education for all students.

Our collective efforts have not gone unnoticed. This year, we have achieved a significant milestone with 57% of voters expressing their support for charter schools, marking the highest level of approval ever recorded in the state. It is particularly heartening to note that parents, our most important stakeholders, have shown overwhelming support, with 63% of them favoring charter schools. These results are a testament to the hard work and resilience of our charter school community.

In the Summer of 2023, we secured our highest policy priority, renewal relief for all charters, as well as updated verified data criteria and data use procedures and \$30M in SB740 funding. Our success this year didn't stop there. This Fall we secured a veto of AB 1604, an effort by our opponents to limit charter schools' access to facilities. Other legislative updates are reflected in this Compilation. Below you will find a list and short summary of several notable bills reflected in this Compilation. We thank our partners, the attorneys at Procopio Cory Hargreaves & Savitch, LLP, for preparing this new edition of *California Charter School Laws and Regulations* as a part of our continuing effort to keep our member schools informed of selected laws and regulations that may affect them:-

SB 88 (Skinner) Pupil Transportation: Driver Qualifications

SB 88 (Skinner), which was opposed by CCSA, increases requirements for compensated drivers providing pupil transportation. The new requirements under SB 88 will likely increase costs for schools utilizing transportation services from Transportation Network Companies (TNCs), such as HopSkipDrive. There are exceptions, including employees driving for field trips or athletics if the school has attempted to secure a driver qualified under SB 88 and informs parents, up to a limit of 40 hours of drive time within a school year.

AB 10 (Cortese) Opioid Overdose Prevention and AB 889 (Patterson) Synthetic Drugs

AB 10 requires all school safety plans for schools serving grades 7 through 12 to include a protocol for responding to a student's opioid overdose. AB 889 requires all schools to inform parents in the first semester or quarter of each school year of the dangers of synthetic drugs. CCSA maintained a watch position on these bills as they went through the budget and various legislation as they create a new mandate on charter schools moving forward.

SB 671 (Portantino) Plan for Responding to Dangerous Activities

Requires all schools to amend their school safety plans to include procedures to assess and respond to reports of dangerous, violent or unlawful activity conducted or threatened at school or in a school activity.

SB 760 (Newman) and AB 230 (Reyes) School Facilities: Restrooms

SB 760 requires school sites, on or before July 1, 2026, to provide and maintain at least one all-gender restroom if the school site, prior to July 1, 2026, has more than one female and one male restroom designated exclusively for pupil use. AB 230 requires, before the start of the 2024-25 school year, that all schools serving grades 3-12 (previously 6-12) must stock all girls, all all-gender, and at least one boys bathroom with free menstrual products. Both SB 760 and AB 230 also require the posting of specific signage.

SB 515 (Stern) School facilities: Shade structures

Provides additional flexibility related to the installation of shade structures at schoolsites. CCSA supported SB 515 as it will decrease costs for charter schools to install shade structures at their facilities.

AB 1078 (Jackson) Instructional Materials and Curriculum

AB 1078 is intended to address concerns about recent trends of “book banning” or removing materials from classrooms and libraries that reflect representation and contributions from members of diverse groups. CCSA maintained a watch position but engaged closely with the author to protect the core autonomy of charter schools over curriculum choices, while still meeting the goal of ensuring all educational materials reflect the diversity of the state, in accordance with current laws.

SB 274 (Skinner) Willful Defiance

Prohibits the suspension or expulsion of a student enrolled in grades 6-12 based on willful defiance until July 1, 2029, unless there is a need for suspension due to an immediate threat to the safety of pupils or school staff. CCSA has been closely following the debate on willful defiance expulsions in schools and maintained a watch position, since many schools will need to adjust their suspension and expulsion policies in response to this legislation.

As we look ahead to the new year, let us build upon this momentum and continue advocating for the success of charter schools and the students we serve. Always, be sure to respond to our Action Alerts and check the status of bills that might affect charter public schools at <http://www.ccsa.org>. Together, we can shape an even brighter future for education in California.

Thank you for your steadfast commitment and tireless dedication to the movement.

Adelante!



Myrna Castrejón
President and CEO, California Charter Schools Association

About this compilation

Notes from the editors at Procopio

For more than two decades, our Procopio team has published *California Charter School Laws and Regulations*, an updated and annotated compilation of provisions governing and regulating charter schools in California. Across the history of the Charter Schools Act of 1992, the pace and volume of legislative and regulatory change have continued to expand and complicate the charter school legal landscape. This updated compilation is current as it goes online and to print in March 2024.

From time to time as warranted, we may post updated PDF versions at www.procopio.com/practice-areas/view/education.

By its very nature, this compilation is offered outside the context of any client relationship or specific situation. It is a curated set of statutes and regulations we've found most relevant to the opportunities and challenges that drive our legal services to California charter schools. We hope it serves as a useful and handy resource for our charter school community.

Please feel free to contact us to ask questions about anything in this edition of *California Charter School Laws and Regulations*. We, the compilers, have experience not only with the provisions in this book, but also with their interrelationships and practical application to our clients' endeavors.

Thank you for thinking of Procopio!

Your 2024 Editors,

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PART I: THE CHARTER SCHOOLS ACT, as amended
Education Code

GENERAL PROVISIONS
Education Code

This part shall be known, and may be cited, as the "Charter Schools Act of 1992."

It is the intent of the Legislature, in enacting this part, to provide opportunities for teachers, parents, pupils, and community members to establish and maintain schools that operate independently from the existing school district structure, as a method to accomplish all of the following:

- (a) Improve pupil learning.
- (b) Increase learning opportunities for all pupils, with special emphasis on expanded learning experiences for pupils who are identified as academically low achieving.
- (c) Encourage the use of different and innovative teaching methods.
- (d) Create new professional opportunities for teachers, including the opportunity to be responsible for the learning program at the schoolsite.
- (e) Provide parents and pupils with expanded choices in the types of educational opportunities that are available within the public school system.
- (f) Hold the schools established under this part accountable for meeting measurable pupil outcomes, and provide the schools with a method to change from rule-based to performance-based accountability systems.
- (g) Provide vigorous competition within the public school system to stimulate continual improvements in all public schools.

(a) (1) In the 1998-99 school year, the maximum total number of charter schools authorized to operate in this state shall be 250. In the 1999-2000 school year, and in each successive school year thereafter, an additional 100 charter schools are authorized to operate in this state each successive school year. For the purposes of implementing this section, the State Board of Education shall assign a number to each charter petition that it grants pursuant to subdivision (j) of Section 47605 or Section 47605.8 and to each charter notice it receives pursuant to this part, based on the chronological order in which the notice is received. Each number assigned by the state board on or after January 1, 2003, shall correspond to a single petition that identifies a charter school that will operate within the geographic and site limitations of this part. The State Board of Education shall develop a numbering system for charter schools that identifies each school associated with a charter and that operates within the existing limit on the number of charter schools that can be approved each year. For purposes of this section, sites that share educational programs and serve similar pupil populations may not be counted as separate schools. Sites that do not share a common educational program shall be considered separate schools for purposes of this section. The limits contained in this paragraph may not be waived by the State Board of Education pursuant to Section 33050 or any other provision of law.

(2) By July 1, 2003, the Legislative Analyst shall, pursuant to the criteria in Section 47616.5, report to the Legislature on the effectiveness of the charter school approach authorized under this part and recommend whether to expand or reduce the annual rate of growth of charter schools authorized pursuant to this section.

(b) No charter shall be granted under this part that authorizes the conversion of any private school to a charter school. No charter school shall receive any public funds for a pupil if the pupil also attends a private school that charges the pupil's family for tuition. The State Board of Education shall adopt regulations to implement this section.

(a) This part shall not be construed to prohibit any private person or organization from providing funding or other assistance to the establishment or operation of a charter school.

(b) This section shall become operative on July 1, 2017.

(a) A charter school may elect to operate as, or be operated by, a nonprofit public benefit corporation, formed and organized pursuant to the Nonprofit Public Benefit Corporation Law (Part 2 (commencing with Section 5110) of Division 2 of Title 1 of the Corporations Code).

(b) (1) On and after July 1, 2019, a petitioner that submits a charter petition or a charter school that submits a charter renewal or material revision application shall not operate as, or be operated by, a for-profit corporation, a for-profit educational management organization, or a for-profit charter management organization. For purposes of this section, a for-profit educational management organization and a for-profit charter management organization are entities that manage or operate a charter school.

(2) (A) "Operate as, or be operated by," as referenced in paragraph (1), means services provided by a for-profit corporation to a charter school that include any of the following:

- (i) Nominating, appointing, or removing board members or officers of the charter school.
- (ii) Employing, supervising, or dismissing employees of the charter school, including certificated and noncertificated school personnel.
- (iii) Managing the charter school's day-to-day operations as its administrative manager.

Section 47600

Title of Act

Section 47601

Legislative intent

Pupil learning
Increased learning opportunities

Innovative teaching
New professional opportunities

Public school choice

Accountability

Competition and improvements

Section 47602

Limit on number of schools

Report on effectiveness

No conversion of private schools;
no funds for private school pupils;
regulations

Section 47603

Assistance allowed; county loans

Section 47604

**Operating as or by
a nonprofit corporation**

No operation as or by a for-profit

Definition:

"operate as, or be operated by"

Section 47604
Operating as or by
a nonprofit corporation
(continued)

No liability of
charter granting authority

- (iv) Approving, denying, or managing the budget or any expenditures of the charter school that are not authorized by the governing body of the charter school.
- (v) Providing services to a charter school before the governing body of the charter school has approved the contract for those services at a publicly noticed meeting.
- (B) A charter school shall not enter into a subcontract to avoid the requirements of this paragraph.
- (c) A chartering authority that grants a charter to a charter school to be operated as or by a nonprofit public benefit corporation shall be entitled to a single representative on the board of directors of the nonprofit public benefit corporation.
- (d) A chartering authority that grants a charter to a charter school to be operated as or by a nonprofit public benefit corporation is not liable for the debts or obligations of the charter school or for claims arising from the performance of acts, errors, or omissions by the charter school if the chartering authority has complied with all oversight responsibilities required by law, including, but not limited to, those required by Section 47604.32 and subdivision (m) of Section 47605.
- (e) This section shall become operative on July 1, 2019.

Section 47604.1
Charter school compliance
with transparency laws

Brown Act

- (a) For purposes of this section, an “entity managing a charter school” means a nonprofit public benefit corporation that operates a charter school consistent with Section 47604. An entity that is not authorized to operate a charter school pursuant to Section 47604 is not an “entity managing a charter school” solely because it contracts with a charter school to provide to that charter school goods or task-related services that are performed at the direction of the governing body of the charter school and for which the governing body retains ultimate decision-making authority.
- (b) A charter school and an entity managing a charter school shall be subject to all of the following:
 - (1) The Ralph M. Brown Act (Chapter 9 (commencing with Section 54950) of Part 1 of Division 2 of Title 5 of the Government Code), except that a charter school operated by an entity pursuant to Chapter 5 (commencing with Section 47620) shall be subject to the Bagley-Keene Open Meeting Act (Article 9 (commencing with Section 11120) of Chapter 1 of Part 1 of Division 3 of Title 2 of the Government Code) regardless of the authorizing entity.

Public Records Act

- (2) (A) The California Public Records Act (Chapter 3.5 (commencing with Section 6250) of Division 7 of Title 1 of the Government Code).
- (B) (i) The chartering authority of a charter school shall be the custodian of records with regard to any request for information submitted to the charter school if either of the following apply:
 - (I) The charter school is located on a federally recognized California Indian reservation or rancheria.
 - (II) The charter school is operated by a nonprofit public benefit corporation that was formed on or before May 31, 2002, and is currently operated by a federally recognized California Indian tribe.
- (ii) This subparagraph does not allow a chartering authority to delay or obstruct access to records otherwise required under the California Public Records Act (Chapter 3.5 (commencing with Section 6250) of Division 7 of Title 1 of the Government Code).

Conflict of interest
(Section 1090 et seq.)
Political Reform Act

- (3) Article 4 (commencing with Section 1090) of Chapter 1 of Division 4 of Title 1 of the Government Code.
- (4)(A) The Political Reform Act of 1974 (Title 9 (commencing with Section 81000) of the Government Code).
- (B) For purposes of Section 87300 of the Government Code, a charter school and an entity managing a charter school shall be considered an agency and is the most decentralized level for purposes of adopting a conflict-of-interest code.

Governing board
teleconferencing requirements

- (c) (1) (A) The governing body of one charter school shall meet within the physical boundaries of the county in which the charter school is located.

Nonclassroom-based charter school

- (B) A two-way teleconference location shall be established at each schoolsite.
- (2) (A) The governing body of one nonclassroom-based charter school that does not have a facility or operates one or more resource centers shall meet within the physical boundaries of the county in which the greatest number of pupils who are enrolled in that charter school reside.
- (B) A two-way teleconference location shall be established at each resource center.

Entity operating one or more
charter schools in the same county

- (3) (A) For a governing body of an entity managing one or more charter schools located within the same county, the governing body of the entity managing a charter school shall meet within the physical boundaries of the county in which that charter school or schools are located.
- (B) A two-way teleconference location shall be established at each schoolsite and each resource center.

Entity operating two or more charter
schools in different counties

- (4) (A) For a governing body of an entity that manages two or more charter schools that are not located in the same county, the governing body of the entity managing the charter schools shall meet within the physical boundaries of the county in which the greatest number of pupils enrolled in those charter schools managed by that entity reside.
- (B) A two-way teleconference location shall be established at each schoolsite and each resource center.
- (C) The governing body of the entity managing the charter schools shall audio record, video record, or both, all the governing board meetings and post the recordings on each charter school’s internet website.

(5) This subdivision does not limit the authority of the governing body of a charter school and an entity managing a charter school to meet outside the boundaries described in this subdivision if authorized by Section 54954 of the Government Code, and the meeting place complies with Section 54961 of the Government Code.

(d) Notwithstanding Article 4 (commencing with Section 1090) of Chapter 1 of Division 4 of Title 1 of the Government Code, an employee of a charter school shall not be disqualified from serving as a member of the governing body of the charter school because of that employee's employment status. A member of the governing body of a charter school who is also an employee of the charter school shall abstain from voting on, or influencing or attempting to influence another member of the governing body regarding, all matters uniquely affecting that member's employment.

(e) To the extent a governing body of a charter school or an entity managing a charter school engages in activities that are unrelated to a charter school, Article 4 (commencing with Section 1090) of Chapter 1 of Division 4 of Title 1 of the Government Code, the Ralph M. Brown Act (Chapter 9 (commencing with Section 54950) of Part 1 of Division 2 of Title 5 of the Government Code), the Bagley-Keene Open Meeting Act (Article 9 (commencing with Section 11120) of Chapter 1 of Part 1 of Division 3 of Title 2 of the Government Code), the California Public Records Act (Chapter 3.5 (commencing with Section 6250) of Division 7 of Title 1 of the Government Code), and the Political Reform Act of 1974 (Title 9 (commencing with Section 81000) of the Government Code) shall not apply with regard to those unrelated activities unless otherwise required by law.

(f) A meeting of the governing body of a charter school to discuss items related to the operation of the charter school shall not include the discussion of any item regarding an activity of the governing body that is unrelated to the operation of the charter school.

(g) The requirements of this section shall not be waived by the state board pursuant to Section 33050 or any other law.

(a) For purposes of this section, "entity managing a charter school" has the same meaning as described in subdivision (a) of Section 47604.1.

(b) (1) There may be submitted to the governing body of a charter school attended by high school pupils, or to the governing body of an entity managing multiple charter schools including a charter school attended by high school pupils, a pupil petition requesting the governing body of the charter school or the governing body of the entity managing multiple charter schools, as appropriate, to appoint one or more pupil members to the appropriate governing body pursuant to this section.

(2) The petition shall contain the signatures of either (A) not less than 500 pupils regularly enrolled in the high school of the charter school, or (B) not less than 10 percent of the number of pupils regularly enrolled in the high school of the charter school. If a charter school attended by high school pupils is operated by an entity managing a charter school or managing multiple charter schools, then the petition shall contain the signatures of either (A) not less than 500 pupils regularly enrolled in any of the high schools operated by the entity managing a charter school or multiple charter schools, or (B) not less than 10 percent of the number of pupils regularly enrolled in high schools operated by the entity managing a charter school or multiple charter schools. Each fiscal year, and within 60 days of receipt of a petition for pupil representation, or at its next regularly scheduled meeting if no meeting is held within those 60 days, the governing body of the charter school or of the entity managing multiple charter schools shall order the inclusion within the membership of that governing body, in addition to the number of members otherwise prescribed, of at least one pupil member. The governing body of the charter school or of the entity managing multiple charter schools may order the inclusion of more than one pupil member.

(3) Upon receipt of a petition for pupil representation, the governing body of a charter school or of an entity managing multiple charter schools shall, commencing July 1, 2023, and each year thereafter, order the inclusion within the membership of that governing body, in addition to the number of regular members otherwise prescribed, of at least one pupil member. The governing body of a charter school or of an entity managing multiple charter schools may order the inclusion of more than one pupil member. The governing body of a charter school or of an entity managing multiple charter schools may appoint a pupil to serve as an alternate pupil member who would fulfill all duties and have the same rights as a pupil member if that governing body determines the pupil member is not fulfilling their duties. If the governing body of a charter school or of an entity managing multiple charter schools appoints an alternate pupil member, that governing body shall suspend the prior pupil member's rights and privileges related to service on that governing body.

(4) (A) A pupil member of the governing body of a charter school or of an entity managing multiple charter schools shall have preferential voting rights.

(B) Preferential voting, as used in this section, means a formal expression of opinion that is recorded in the minutes and cast before the official vote of the governing body of the charter school or of an entity managing multiple charter schools. A preferential vote shall not serve in determining the final numerical outcome of a vote. No preferential vote shall be solicited on matters subject to closed session discussion.

Section 47604.1
Charter school compliance with transparency laws
(continued)

Exceptions to meeting location requirement

Charter school employee serving as board member

Activities unrelated to charter school operation

Board discussion of unrelated activity

No SBE waiver of requirements

Section 47604.2
Student board members: high schools

Student petition

Student petition signatures

Upon petition, board must order inclusion of at least one student member

Student member preferential voting rights

Section 47604.2
Student board members:
high schools
(continued)

No closed-session attendance	<p>(5) The governing body of a charter school or of an entity managing multiple charter schools may adopt a resolution authorizing the pupil member or members to make motions that may be acted upon by that governing body, except on matters dealing with employer-employee relations pursuant to Chapter 10.7 (commencing with Section 3540) of Division 4 of Title 1 of the Government Code.</p> <p>(6) (A) Each pupil member shall have the right to attend each and all meetings of the governing body of a charter school or of an entity managing multiple charter schools, except closed sessions.</p> <p>(B) (i) Each pupil member shall be appointed to subcommittees of the governing body in the same manner as other governing body regular members.</p> <p>(ii) Each pupil member shall be made aware of the time commitment required to participate in subcommittee meetings and work, and may decline an appointment to a subcommittee.</p> <p>(iii) Subcommittee meetings may be scheduled in accordance with the availability of all members of the governing body, including each pupil member.</p>
Policies and procedures for selection	<p>(7) Any pupil selected to serve as a member of the governing body of a charter school or of an entity managing multiple charter schools shall be enrolled in high school within the charter school, may be less than 18 years of age, and shall be chosen by the pupils enrolled in high school within the charter school in accordance with policies and procedures prescribed by that governing body. The term of a pupil member shall be one year, commencing on July 1 of each year, except that the term of a pupil member may be adjusted only in cases where a vacancy occurs or to provide more pupils with an opportunity to serve on the governing body.</p> <p>(8) (A) A pupil member shall be entitled to the mileage allowance to the same extent as regular governing body members, and may receive compensation, as specified pursuant to subparagraph(B).</p> <p>(B) The governing body of a charter school or of an entity managing multiple charter schools may award a pupil member either or both of the following:</p> <p>(1) Elective course credit based on the number of equivalent daily instructional minutes for the pupil member's services provided.</p> <p>(2) Monthly financial compensation as determined by the governing body.</p> <p>(9) (A) A pupil member shall be seated with the regular members of the governing body of a charter school or of an entity managing multiple charter schools, and shall be recognized as a full member of that governing body at the meetings, including receiving all open meeting materials presented to the governing body regular members at the same time the materials are presented to the other governing body regular members, being invited to staff briefings of governing body regular members, or being provided a separate staff briefing within the same timeframe as the staff briefing of other governing body regular members, being invited to attend other functions of that governing body, such as forums, meetings with pupils and parents, and other general assemblies, and participating in the questioning of witnesses and the discussion of issues.</p> <p>(B) A pupil member shall also receive all materials received by other governing body regular members between open meetings, except for materials that pertain to closed session items.</p>
No determinative vote	<p>(10) A pupil member shall not be included in determining the vote required to carry any measure before the governing body of a charter school or of an entity managing multiple charter schools.</p> <p>(11) The pupil member shall not be liable for any acts of the governing body of a charter school or of an entity managing multiple charter schools.</p>
Elimination of student member position	<p>(12) A majority vote of all voting governing body members shall be required to approve a motion to eliminate the pupil member position from the governing body of a charter school or of an entity managing multiple charter schools. The motion shall be listed as a public agenda item for a meeting of the governing body before the motion being voted upon.</p>
Not a board member for Brown Act purposes	<p>(c) A pupil member of the governing body of a charter school or of an entity managing multiple charter schools shall not be considered a member of a legislative body or a local agency for purposes of the Ralph M. Brown Act (Chapter 9 (commencing with Section 54950) of Part 1 of Division 2 of Title 5 of the Government Code) or the Bagley-Keene Open Meeting Act.</p>
Notice to authorizer	<p>(d) The governing body of a charter school or of an entity managing multiple charter schools that orders the inclusion of a pupil member within its governing body membership pursuant to paragraph (2) of subdivision (b) shall do both of the following:</p> <p>(1) (A) Notify the chartering authority of the charter school within 30 days of either of the following:</p> <p>(i) The inclusion of the pupil member.</p> <p>(ii) Any subsequent change in the pupil membership.</p> <p>(B) The notification shall be in writing, include the name of the pupil member, the duration of the term of the pupil, and a copy of the approved pupil petition described in subdivision (b).</p> <p>(2) Include at the next charter renewal with the chartering authority, the inclusion of the pupil member as a change to the governing body of the charter school or of an entity managing multiple charter schools.</p> <p>(e) As used in this section, the following definitions apply:</p> <p>(1) "Pupil member" means a pupil member appointed pursuant to subdivision (b).</p> <p>(2) "Regular member" means a governing body member nominated or appointed to the governing</p>

body of the charter school or of an entity managing multiple charter schools, consistent with Section 47605 or 47605.6, as applicable.

(f) This section shall prevail over any contrary provision in the Nonprofit Public Benefit Corporation Law (Part 2 (commencing with Section 5110) of Division 2 of Title 1 of the Corporations Code), or between this section and a nonprofit public benefit corporation's articles of incorporation or bylaws, relating to pupil members on the governing body of the charter school or of an entity managing multiple charter schools. Nothing in this section otherwise alters, amends, or impairs the rights, duties, and obligations of a nonprofit public benefit corporation relating to the operation of a charter school.

(g) The requirements of this section shall not be waived by the state board pursuant to Section 33050 or any other law.

A charter school shall promptly respond to all reasonable inquiries, including, but not limited to, inquiries regarding its financial records, from its chartering authority, the county office of education that has jurisdiction over the school's chartering authority, or from the Superintendent of Public Instruction and shall consult with the chartering authority, the county office of education, or the Superintendent of Public Instruction regarding any inquiries.

(a) Each chartering authority, in addition to any other duties imposed by this part, shall do all of the following with respect to each charter school under its authority:

(1) Identify at least one staff member as a contact person for the charter school.

(2) Visit each charter school at least annually.

(3) Ensure that each charter school under its authority complies with all reports required of charter schools by law, including the local control and accountability plan and annual update to the local control and accountability plan required pursuant to Section 47606.5.

(4) Monitor the fiscal condition of each charter school under its authority.

(5) Provide timely notification to the department if any of the following circumstances occur or will occur with regard to a charter school for which it is the chartering authority:

(A) A renewal of the charter is granted or denied.

(B) The charter is revoked.

(C) The charter school will cease operation for any reason.

(b) The cost of performing the duties required by this section shall be funded with supervisory oversight fees collected pursuant to Section 47613.

(a) Each charter school shall annually prepare and submit the following reports to its chartering authority and the county superintendent of schools, or only to the county superintendent of schools if the county board of education is the chartering authority:

(1) On or before July 1, a preliminary budget. For a charter school in its first year of operation, the information submitted pursuant to subdivision (h) of Section 47605 satisfies this requirement.

(2) On or before July 1, a local control and accountability plan and an annual update to the local control and accountability plan required pursuant to Section 47606.5.

(3) On or before December 15, an interim financial report. This report shall reflect changes through October 31.

(4) On or before March 15, a second interim financial report. This report shall reflect changes through January 31.

(5) On or before September 15, a final unaudited report for the full prior year.

(b) The chartering authority shall use any financial or other information it obtains from the charter school, including, but not limited to, the reports required by this section, to perform the duties described in subdivision (a) of Section 47604.32, including monitoring the fiscal condition of the charter school.

(c) The cost of performing the duties required by this section shall be funded with supervisory oversight fees collected pursuant to Section 47613.

(a) In addition to the authority granted by Sections 1241.5 and 47604.3, a county superintendent of schools may, based upon written complaints by parents or other information that justifies the investigation, monitor the operations of a charter school located within that county and conduct an investigation into the operations of that charter school. If a county superintendent of schools monitors or investigates a charter school pursuant to this section, the county office of education shall not incur any liability beyond the cost of the investigation.

(b) A charter school shall notify the county superintendent of schools of the county in which it is located of the location of the charter school, including the location of each site, if applicable, prior to commencing operations.

The state board may, based upon the recommendation of the Superintendent, take appropriate action, including, but not limited to, revocation of the charter school's charter, when the state board finds any of the following:

Section 47604.2
Student board members:
high schools
(continued)

No SBE waiver

Section 47604.3
Response to reasonable inquiries

Section 47604.32
Oversight duties of
chartering authority

Section 47604.33
Periodic financial reports

Section 47604.4
County Superintendent
may investigate

Notice of sites to
County Superintendent

Section 47604.5
Revocation by SBE

Section 47604.5
Revocation by SBE

(continued)
Financial mismanagement
Illegal use of funds

Departure from
successful practices
Failure to improve pupil outcomes
across multiple priorities

No SBE waiver

- (a) Gross financial mismanagement that jeopardizes the financial stability of the charter school.
- (b) Illegal or substantially improper use of charter school funds for the personal benefit of any officer, director, or fiduciary of the charter school.
- (c) Substantial and sustained departure from measurably successful practices such that continued departure would jeopardize the educational development of the charter school's pupils.
- (d) Failure to improve pupil outcomes across multiple state and school priorities identified in the charter pursuant to subparagraph (A) of paragraph (5) of subdivision (c) of Section 47605 or subparagraph (A) of paragraph (5) of subdivision (b) of Section 47605.6.
- (e) The requirements of this section shall not be waived by the state board pursuant to Section 33050 or any other law.

ESTABLISHMENT OF CHARTER SCHOOLS
Education Code

Section 47605
Petition required elements

Signature of parents

Signature of teachers

Conversion of
existing public school

Signature indicates
meaningful interest

Additional sites or grade levels
are material charter revisions

Site located outside school district
boundaries before January 1, 2020;
requirements for continued operation

Presidential declaration of
major disaster or emergency

Schools on
Indian reservation or rancharia

- (a) (1) Except as set forth in paragraph (2), a petition for the establishment of a charter school within a school district may be circulated by one or more persons seeking to establish the charter school. A petition for the establishment of a charter school shall identify a single charter school that will operate within the geographic boundaries of that school district. A charter school may propose to operate at multiple sites within the school district if each location is identified in the charter school petition. The petition may be submitted to the governing board of the school district for review after either of the following conditions is met:
 - (A) The petition is signed by a number of parents or legal guardians of pupils that is equivalent to at least one-half of the number of pupils that the charter school estimates will enroll in the charter school for its first year of operation.
 - (B) The petition is signed by a number of teachers that is equivalent to at least one-half of the number of teachers that the charter school estimates will be employed at the charter school during its first year of operation.
- (2) A petition that proposes to convert an existing public school to a charter school that would not be eligible for a loan pursuant to subdivision (c) of Section 41365 may be circulated by one or more persons seeking to establish the charter school. The petition may be submitted to the governing board of the school district for review after the petition is signed by not less than 50 percent of the permanent status teachers currently employed at the public school to be converted.
- (3) A petition shall include a prominent statement that a signature on the petition means that the parent or legal guardian is meaningfully interested in having their child or ward attend the charter school, or in the case of a teacher's signature, means that the teacher is meaningfully interested in teaching at the charter school. The proposed charter shall be attached to the petition.
- (4) After receiving approval of its petition, a charter school that proposes to expand operations to one or more additional sites or grade levels shall request a material revision to its charter and shall notify the chartering authority of those additional locations or grade levels. The chartering authority shall consider whether to approve those additional locations or grade levels at an open, public meeting. If the additional locations or grade levels are approved pursuant to the standards and criteria described in subdivision (c), they shall be a material revision to the charter school's charter.
- (5) (A) A charter school that established one site outside the boundaries of the school district, but within the county in which that school district is located before January 1, 2020, may continue to operate that site until the charter school submits a request for the renewal of its charter petition. To continue operating the site, the charter school shall do either of the following:
 - (i) First, before submitting the request for the renewal of the charter petition, obtain approval in writing from the school district where the site is operating.
 - (ii) Submit a request for the renewal of the charter petition pursuant to Section 47607 to the school district in which the charter school is located.
- (B) If a Presidential declaration of a major disaster or emergency is issued in accordance with the federal Robert T. Stafford Disaster Relief and Emergency Assistance Act (42 U.S.C. Sec. 5121 et seq.) for an area in which a charter school site is located and operating, the charter school, for not more than five years, may relocate that site outside the area subject to the Presidential declaration if the charter school first obtains the written approval of the school district where the site is being relocated to.
- (C) Notwithstanding subparagraph (A), if a charter school was relocated from December 31, 2016, to December 31, 2019, inclusive, due to a Presidential declaration of a major disaster or emergency in accordance with the federal Robert T. Stafford Disaster Relief and Emergency Assistance Act (42 U.S.C. Sec. 5121 et seq.), that charter school shall be allowed to return to its original campus location in perpetuity.
- (D) (i) A charter school in operation and providing educational services to pupils before October 1, 2019, located on a federally recognized California Indian reservation or rancharia or operated by a federally recognized California Indian tribe shall be exempt from the geographic restrictions

Section 47605
Petition required elements
(continued)

of paragraph (1) and subparagraph (A) of this paragraph and the geographic restrictions of subdivision (a) of Section 47605.1.

(ii) The exemption to the geographic restrictions of subdivision (a) of [Section] 47605.1 in clause (i) does not apply to nonclassroom-based charter schools operating pursuant to Section 47612.5.

(E) The department shall regard as a continuing charter school for all purposes a charter school that was granted approval of its petition, that was providing educational services to pupils before October 1, 2019, and is authorized by a different chartering authority due to changes to this paragraph that took effect January 1, 2020. This paragraph shall be implemented only to the extent it does not conflict with federal law. In order to prevent any potential conflict with federal law, this paragraph does not apply to covered programs as identified in Section 8101(11) of the federal Elementary and Secondary Education Act of 1965 (20 U.S.C. Sec. 7801) to the extent the affected charter school is the restructured portion of a divided charter school pursuant to Section 47654.

(6) Commencing January 1, 2003, a petition to establish a charter school shall not be approved to serve pupils in a grade level that is not served by the school district of the governing board considering the petition, unless the petition proposes to serve pupils in all of the grade levels served by that school district.

(b) No later than 60 days after receiving a petition, in accordance with subdivision (a), the governing board of the school district shall hold a public hearing on the provisions of the charter, at which time the governing board of the school district shall consider the level of support for the petition by teachers employed by the school district, other employees of the school district, and parents. Following review of the petition and the public hearing, the governing board of the school district shall either grant or deny the charter within 90 days of receipt of the petition, provided, however, that the date may be extended by an additional 30 days if both parties agree to the extension. A petition is deemed received by the governing board of the school district for purposes of commencing the timelines described in this subdivision on the day the petitioner submits a petition to the district office, along with a signed certification that the petitioner deems the petition to be complete. The governing board of the school district shall publish all staff recommendations, including the recommended findings and, if applicable, the certification from the county superintendent of schools prepared pursuant to paragraph (8) of subdivision (c), regarding the petition at least 15 days before the public hearing at which the governing board of the school district will either grant or deny the charter. At the public hearing at which the governing board of the school district will either grant or deny the charter, petitioners shall have equivalent time and procedures to present evidence and testimony to respond to the staff recommendations and findings.

(c) In reviewing petitions for the establishment of charter schools pursuant to this section, the chartering authority shall be guided by the intent of the Legislature that charter schools are and should become an integral part of the California educational system and that the establishment of charter schools should be encouraged. The governing board of the school district shall grant a charter for the operation of a school under this part if it is satisfied that granting the charter is consistent with sound educational practice and with the interests of the community in which the school is proposing to locate. The governing board of the school district shall consider the academic needs of the pupils the school proposes to serve. The governing board of the school district shall not deny a petition for the establishment of a charter school unless it makes written factual findings, specific to the particular petition, setting forth specific facts to support one or more of the following findings:

(1) The charter school presents an unsound educational program for the pupils to be enrolled in the charter school.

(2) The petitioners are demonstrably unlikely to successfully implement the program set forth in the petition.

(3) The petition does not contain the number of signatures required by subdivision (a).

(4) The petition does not contain an affirmation of each of the conditions described in subdivision (e).

(5) The petition does not contain reasonably comprehensive descriptions of all of the following:

(A) (i) The educational program of the charter school, designed, among other things, to identify those whom the charter school is attempting to educate, what it means to be an "educated person" in the 21st century, and how learning best occurs. The goals identified in that program shall include the objective of enabling pupils to become self-motivated, competent, and lifelong learners.

(ii) The annual goals for the charter school for all pupils and for each subgroup of pupils identified pursuant to Section 52052, to be achieved in the state priorities, as described in subdivision (d) of Section 52060, that apply for the grade levels served, and specific annual actions to achieve those goals. A charter petition may identify additional school priorities, the goals for the school priorities, and the specific annual actions to achieve those goals.

(iii) If the proposed charter school will serve high school pupils, the manner in which the charter school will inform parents about the transferability of courses to other public high schools and the eligibility of courses to meet college entrance requirements. Courses offered by the charter

Continuing charter schools

Grade levels
not served by school district

Public hearing timelines

Written factual findings for denial

Unsound educational program

Unlikely to implement successfully

Insufficient signatures
Affirmations omitted

Comprehensive
description of elements
Description of educational program

Description of annual goals
aligned with applicable state priorities

High schools: transferability of courses
and college entrance requirements

Section 47605
Petition required elements

(continued)

Measurable pupil outcomes schoolwide and for all pupil groups	<p>school that are accredited by the Western Association of Schools and Colleges may be considered transferable and courses approved by the University of California or the California State University as creditable under the "A to G" admissions criteria may be considered to meet college entrance requirements.</p> <p>(B) The measurable pupil outcomes identified for use by the charter school. "Pupil outcomes," for purposes of this part, means the extent to which all pupils of the charter school demonstrate that they have attained the skills, knowledge, and attitudes specified as goals in the charter school's educational program. Pupil outcomes shall include outcomes that address increases in pupil academic achievement both schoolwide and for all pupil subgroups served by the charter school, as that term is defined in subdivision (a) of Section 52052. The pupil outcomes shall align with the state priorities, as described in subdivision (d) of Section 52060, that apply for the grade levels served by the charter school.</p>
Method to measure pupil outcomes	<p>(C) The method by which pupil progress in meeting those pupil outcomes is to be measured. To the extent practicable, the method for measuring pupil outcomes for state priorities shall be consistent with the way information is reported on a school accountability report card.</p>
Governance structure	<p>(D) The governance structure of the charter school, including, but not limited to, the process to be followed by the charter school to ensure parental involvement.</p>
Employee qualifications	<p>(E) The qualifications to be met by individuals to be employed by the charter school.</p>
Health and safety procedures	<p>(F) The procedures that the charter school will follow to ensure the health and safety of pupils and staff. These procedures shall require all of the following:</p>
Employee criminal records	<p>(i) That each employee of the charter school furnish the charter school with a criminal record summary as described in Section 44237.</p>
School safety plan	<p>(ii) For all schools, the development of a school safety plan, which shall include the safety topics listed in subparagraphs (A) to (K), inclusive, of paragraph (2) of subdivision (a) of Section 32282. For schools serving pupils in any of grades 7 to 12, inclusive, the development of a school safety plan shall also include the safety topic listed in subparagraph (L) of paragraph (2) of subdivision (a) of Section 32282.</p> <p>(iii) That the school safety plan be reviewed and updated by March 1 of every year by the charter school.</p>
Racial and ethnic balance	<p>(G) The means by which the charter school will achieve a balance of racial and ethnic pupils, special education pupils, and English learner pupils, including redesignated fluent English proficient pupils, as defined by the evaluation rubrics in Section 52064.5, that is reflective of the general population residing within the territorial jurisdiction of the school district to which the charter petition is submitted. Upon renewal, for a charter school not deemed to be a local educational agency for purposes of special education pursuant to Section 47641, the chartering authority may consider the effect of school placements made by the chartering authority in providing a free and appropriate public education as required by the federal Individuals with Disabilities Education Act (Public Law 101-476), on the balance of pupils with disabilities at the charter school.</p>
Admissions policies	<p>(H) Admission policies and procedures, consistent with subdivision (e).</p>
Annual financial audits	<p>(I) The manner in which annual, independent financial audits shall be conducted, which shall employ generally accepted accounting principles, and the manner in which audit exceptions and deficiencies shall be resolved to the satisfaction of the chartering authority.</p>
Suspension and expulsion procedures	<p>(J) The procedures by which pupils can be suspended or expelled from the charter school for disciplinary reasons or otherwise involuntarily removed from the charter school for any reason. These procedures, at a minimum, shall include an explanation of how the charter school will comply with federal and state constitutional procedural and substantive due process requirements that is consistent with all of the following:</p>
Suspensions for fewer than 10 days	<p>(i) For suspensions of fewer than 10 days, provide oral or written notice of the charges against the pupil and, if the pupil denies the charges, an explanation of the evidence that supports the charges and an opportunity for the pupil to present the pupil's side of the story.</p>
Suspensions for 10 or more days	<p>(ii) For suspensions of 10 days or more and all other expulsions for disciplinary reasons, both of the following:</p> <p>(I) Provide timely, written notice of the charges against the pupil and an explanation of the pupil's basic rights.</p> <p>(II) Provide a hearing adjudicated by a neutral officer within a reasonable number of days at which the pupil has a fair opportunity to present testimony, evidence, and witnesses and confront and cross-examine adverse witnesses, and at which the pupil has the right to bring legal counsel or an advocate.</p>
Involuntary removals	<p>(iii) Contain a clear statement that no pupil shall be involuntarily removed by the charter school for any reason unless the parent or guardian of the pupil has been provided written notice of intent to remove the pupil no less than five schooldays before the effective date of the action. The written notice shall be in the native language of the pupil or the pupil's parent or guardian, or, if the pupil is a homeless child or youth, or a foster child or youth, in the native language of the homeless or foster child's educational rights holder. In the case of a foster child or youth, the written notice shall also be provided to the foster child's attorney and county social worker. If the pupil is a Indian child, as defined in Section 224.1 of the Welfare and Institutions Code, the written notice shall also be provided to the Indian child's tribal social worker and, if applicable,</p>

Section 47605
Petition required elements
(continued)
PERS, STRS, or social security

county social worker. The written notice shall inform the pupil, the pupil's parent or guardian, the homeless child's educational rights holder, the foster child's educational rights holder, attorney, and county social worker, or the Indian child's tribal social worker and, if applicable, county social worker of the right to initiate the procedures specified in clause (ii) before the effective date of the action. If the pupil's parent or guardian, the homeless child's educational rights holder, the foster child's educational rights holder, attorney, or county social worker, or the Indian child's tribal social worker or, if applicable, county social worker initiates the procedures specified in clause (ii), the pupil shall remain enrolled and shall not be removed until the charter school issues a final decision. For purposes of this clause, "involuntarily removed" includes disenrolled, dismissed, transferred, or terminated, but does not include suspensions specified in clauses (i) and (ii).

(iv) A foster child's educational rights holder, attorney, and county social worker and an Indian child's tribal social worker and, if applicable, county social worker shall have the same rights a parent or guardian of a child has to receive a suspension notice, expulsion notice, manifestation determination notice, involuntary transfer notice, and other documents and related information.

(K) The manner by which staff members of the charter schools will be covered by the State Teachers' Retirement System, the Public Employees' Retirement System, or federal social security.

(L) The public school attendance alternatives for pupils residing within the school district who choose not to attend charter schools.

(M) The rights of an employee of the school district upon leaving the employment of the school district to work in a charter school, and of any rights of return to the school district after employment at a charter school.

(N) The procedures to be followed by the charter school and the chartering authority to resolve disputes relating to provisions of the charter.

(O) The procedures to be used if the charter school closes. The procedures shall ensure a final audit of the charter school to determine the disposition of all assets and liabilities of the charter school, including plans for disposing of any net assets and for the maintenance and transfer of pupil records.

(6) The petition does not contain a declaration of whether or not the charter school shall be deemed the exclusive public employer of the employees of the charter school for purposes of Chapter 10.7 (commencing with Section 3540) of Division 4 of Title 1 of the Government Code.

(7) The charter school is demonstrably unlikely to serve the interests of the entire community in which the school is proposing to locate. Analysis of this finding shall include consideration of the fiscal impact of the proposed charter school. A written factual finding under this paragraph shall detail specific facts and circumstances that analyze and consider the following factors:

(A) The extent to which the proposed charter school would substantially undermine existing services, academic offerings, or programmatic offerings.

(B) Whether the proposed charter school would duplicate a program currently offered within the school district and the existing program has sufficient capacity for the pupils proposed to be served within reasonable proximity to where the charter school intends to locate.

(8) The school district is not positioned to absorb the fiscal impact of the proposed charter school. A school district satisfies this paragraph if it has a qualified interim certification pursuant to Section 42131 and the county superintendent of schools, in consultation with the County Office Fiscal Crisis and Management Assistance Team, certifies that approving the charter school would result in the school district having a negative interim certification pursuant to Section 42131, has a negative interim certification pursuant to Section 42131, or is under state receivership. Charter schools proposed in a school district satisfying one of these conditions shall be subject to a rebuttable presumption of denial.

(d) (1) Charter schools shall meet all statewide standards and conduct the pupil assessments required pursuant to Section 60605 and any other statewide standards authorized in statute or pupil assessments applicable to pupils in noncharter public schools.

(2) Charter schools shall, on a regular basis, consult with their parents, legal guardians, and teachers regarding the charter school's educational programs.

(e) (1) In addition to any other requirement imposed under this part, a charter school shall be nonsectarian in its programs, admission policies, employment practices, and all other operations, shall not charge tuition, and shall not discriminate against a pupil on the basis of the characteristics listed in Section 220. Except as provided in paragraph (2), admission to a charter school shall not be determined according to the place of residence of the pupil, or of that pupil's parent or legal guardian, within this state, except that an existing public school converting partially or entirely to a charter school under this part shall adopt and maintain a policy giving admission preference to pupils who reside within the former attendance area of that public school.

(2) (A) A charter school shall admit all pupils who wish to attend the charter school.

(B) If the number of pupils who wish to attend the charter school exceeds the charter school's capacity, attendance, except for existing pupils of the charter school, shall be determined by a public random drawing. Preference shall be extended to pupils currently attending the charter school and pupils who reside in the school district except as provided for in Section 47614.5. Preferences, including, but not limited to, siblings of pupils admitted or attending the charter school and children of the charter school's teachers, staff, and founders identified in the initial charter, may also be permitted by the chartering authority on an individual charter school basis.

Attendance alternatives

Foster and Indian children social worker's rights

Return rights of employees

Dispute resolution

School closure procedures

Exclusive public employer

Community impacts

Fiscal impact on school district

Statewide standards and pupil assessments

Consultation with parents and teachers
Nonsectarian, tuition-free, and nondiscriminatory

Admit all pupils
Public random drawing

Section 47605

Petition required elements

(continued)

Preferences subject to approval by chartering authority

Priority order for any preference shall be determined in the charter petition in accordance with all of the following:

- (i) Each type of preference shall be approved by the chartering authority at a public hearing.
- (ii) Preferences shall be consistent with federal law, the California Constitution, and Section 200.
- (iii) Preferences shall not result in limiting enrollment access for pupils with disabilities, academically low-achieving pupils, English learners, neglected or delinquent pupils, homeless pupils, or pupils who are economically disadvantaged, as determined by eligibility for any free or reduced-price meal program, foster youth, or pupils based on nationality, race, ethnicity, or sexual orientation.
- (iv) In accordance with Section 49011, preferences shall not require mandatory parental volunteer hours as a criterion for admission or continued enrollment.

Efforts to accommodate growth

(C) In the event of a drawing, the chartering authority shall make reasonable efforts to accommodate the growth of the charter school and shall not take any action to impede the charter school from expanding enrollment to meet pupil demand.

Notification of student expulsions and withdrawals

(3) If a pupil is expelled or leaves the charter school without graduating or completing the school year for any reason, the charter school shall notify the superintendent of the school district of the pupil's last known address within 30 days, and shall, upon request, provide that school district with a copy of the cumulative record of the pupil, including report cards or a transcript of grades, and health information. If the pupil is subsequently expelled or leaves the school district without graduating or completing the school year for any reason, the school district shall provide this information to the charter school within 30 days if the charter school demonstrates that the pupil had been enrolled in the charter school. This paragraph applies only to pupils subject to compulsory full-time education pursuant to Section 48200.

Discouraging enrollment

(4) (A) A charter school shall not discourage a pupil from enrolling or seeking to enroll in the charter school for any reason, including, but not limited to, academic performance of the pupil or because the pupil exhibits any of the characteristics described in clause (iii) of subparagraph (B) of paragraph (2).

Requesting pupil records prior to enrollment
Encouraging disenrollment

(B) A charter school shall not request a pupil's records or require a parent, guardian, or pupil to submit the pupil's records to the charter school before enrollment.

(C) A charter school shall not encourage a pupil currently attending the charter school to disenroll from the charter school or transfer to another school for any reason, including, but not limited to, academic performance of the pupil or because the pupil exhibits any of the characteristics described in clause (iii) of subparagraph (B) of paragraph (2). This subparagraph shall not apply to actions taken by a charter school pursuant to the procedures described in subparagraph (J) of paragraph (5) of subdivision (c).

Enrollment/disenrollment notice requirements

(D) The department shall develop a notice of the requirements of this paragraph. This notice shall be posted on a charter school's internet website. A charter school shall provide a parent or guardian, or a pupil if the pupil is 18 years of age or older, a copy of this notice at all of the following times:

- (i) When a parent, guardian, or pupil inquires about enrollment.
- (ii) Before conducting an enrollment lottery.
- (iii) Before disenrollment of a pupil.

Enrollment complaint procedures

(E) (i) A person who suspects that a charter school has violated this paragraph may file a complaint with the chartering authority.

(ii) The department shall develop a template to be used for filing complaints pursuant to clause (i).

(5) Notwithstanding any other law, a charter school in operation as of July 1, 2019, that operates in partnership with the California National Guard may dismiss a pupil from the charter school for failing to maintain the minimum standards of conduct required by the Military Department.

Dismissing pupils who fail to maintain standards of the military

(f) The governing board of a school district shall not require an employee of the school district to be employed in a charter school.

No charter school employment required

(g) The governing board of a school district shall not require a pupil enrolled in the school district to attend a charter school.

No charter school enrollment required

Information on facilities, administrative services and civil liabilities

(h) The governing board of a school district shall require that the petitioner or petitioners provide information regarding the proposed operation and potential effects of the charter school, including, but not limited to, the facilities to be used by the charter school, the manner in which administrative services of the charter school are to be provided, and potential civil liability effects, if any, upon the charter school and upon the school district. The description of the facilities to be used by the charter school shall specify where the charter school intends to locate. The petitioner or petitioners also shall be required to provide financial statements that include a proposed first-year operational budget, including startup costs, and cashflow and financial projections for the first three years of operation. If the school is to be operated by, or as, a nonprofit public benefit corporation, the petitioner shall provide the names and relevant qualifications of all persons whom the petitioner nominates to serve on the governing body of the charter school.

Financial statements and proposed first-year budget

Board nominees

(i) In reviewing petitions for the establishment of charter schools within the school district, the governing board of the school district shall give preference to petitions that demonstrate the capability to provide comprehensive learning experiences to pupils identified by the petitioner or

Preference to school for low achieving pupils

Section 47605
Petition required elements
(continued)

petitioners as academically low achieving pursuant to the standards established by the department under Section 54032, as that section read before July 19, 2006.

(j) Upon the approval of the petition by the governing board of the school district, the petitioner or petitioners shall provide written notice of that approval, including a copy of the petition, to the applicable county superintendent of schools, the department, and the state board.

(k) (1) (A) (i) If the governing board of a school district denies a petition, the petitioner may elect to submit the petition for the establishment of a charter school to the county board of education. The petitioner shall submit the petition to the county board of education within 30 days of a denial by the governing board of the school district. At the same time the petition is submitted to the county board of education, the petitioner shall also provide a copy of the petition to the school district. The county board of education shall review the petition pursuant to subdivisions (b) and (c). If the petition submitted on appeal contains new or different material terms, the county board of education shall immediately remand the petition to the governing board of the school district for reconsideration, which shall grant or deny the petition within 30 days. If the governing board of the school district denies a petition after reconsideration, the petitioner may elect to resubmit the petition for the establishment of a charter school to the county board of education. (ii) The county board of education shall review the appeal petition pursuant to subdivision (c). If the denial of the petition was made pursuant to paragraph (8) of subdivision (c), the county board of education shall also review the school district's findings pursuant to paragraph (8) of subdivision (c).

(iii) As used in this subdivision, "material terms" of the petition means the signatures, affirmations, disclosures, documents, and descriptions described in subdivisions (a), (b), (c), and (h), but shall not include minor administrative updates to the petition or related documents due to changes in circumstances based on the passage of time related to fiscal affairs, facilities arrangements, or state law, or to reflect the county board of education as the chartering authority.

(B) If the governing board of a school district denies a petition and the county board of education has jurisdiction over a single school district, the petitioner may elect to submit the petition for the establishment of a charter school to the state board. The state board shall review a petition submitted pursuant to this subparagraph pursuant to subdivision (c). If the denial of a charter petition is reversed by the state board pursuant to this subparagraph, the state board shall designate the governing board of the school district in which the charter school is located as the chartering authority.

(2) If the county board of education denies a petition, the petitioner may appeal that denial to the state board.

(A) The petitioner shall submit the petition to the state board within 30 days of a denial by the county board of education. The petitioner shall include the findings and documentary record from the governing board of the school district and the county board of education and a written submission detailing, with specific citations to the documentary record, how the governing board of the school district and the county board of education abused their discretion. The governing board of the school district and county board of education shall prepare the documentary record, including transcripts of the public hearing at which the governing board of the school district and county board of education denied the charter, at the request of the petitioner. The documentary record shall be prepared by the governing board of the school district and county board of education no later than 10 business days after the request of the petitioner is made. At the same time the petition and supporting documentation is submitted to the state board, the petitioner shall also provide a copy of the petition and supporting documentation to the school district and the county board of education.

(B) If the appeal contains new or different material terms, as defined in clause (iii) of subparagraph (A) of paragraph (1), the state board shall immediately remand the petition to the governing board of the school district to which the petition was submitted for reconsideration. The governing board of the school district shall grant or deny the petition within 30 days. If the governing board of the school district denies a petition after reconsideration, the petitioner may elect to resubmit the petition to the state board.

(C) Within 30 days of receipt of the appeal submitted to the state board, the governing board of the school district or county board of education may submit a written opposition to the state board detailing, with specific citations to the documentary record, how the governing board of the school district or the county board of education did not abuse its discretion in denying the petition. The governing board of the school district or the county board of education may submit supporting documentation or evidence from the documentary record that was considered by the governing board of the school district or the county board of education.

(D) The state board's Advisory Commission on Charter Schools shall hold a public hearing to review the appeal and documentary record. Based on its review, the Advisory Commission on Charter Schools shall submit a recommendation to the state board whether there is sufficient evidence to hear the appeal or to summarily deny review of the appeal based on the documentary record. If the Advisory Commission on Charter Schools does not submit a recommendation to the state board, the state board shall consider the appeal, and shall either hear the appeal or summarily

Notice of approval
to county or state

District denial of petition; submission
to county board of education

County board remand to district
if new or different material terms

County board with jurisdiction over
single school district; appeal to SBE

County board denial; appeal to SBE

SBE remand to district
if new or different material terms

District or county board may
submit opposition to SBE appeal

Advisory Commission on Charter
Schools public hearing; SBE review

Section 47605

Petition required elements

(continued)

SBE to hear appeal or summarily deny; affirmation or reversal upon determination of abuse of discretion; designation of chartering authority

deny review of the appeal based on the documentary record at a regular public meeting of the state board.

(E) The state board shall either hear the appeal or summarily deny review of the appeal based on the documentary record. If the state board hears the appeal, the state board may affirm the determination of the governing board of the school district or the county board of education, or both of those determinations, or may reverse only upon a determination that there was an abuse of discretion by each of the governing board of the school district and the county board of education. Abuse of discretion is the most deferential standard of review, under which the state board must give deference to the decisions of the governing board of the school district and the county board of education to deny the petition. If the denial of a charter petition is reversed by the state board, the state board shall designate, in consultation with the petitioner, either the governing board of the school district or the county board of education in which the charter school is located as the chartering authority.

Funding if charter granted on appeal

(3) A charter school for which a charter is granted by either the county board of education or the state board based on an appeal pursuant to this subdivision shall qualify fully as a charter school for all funding and other purposes of this part.

Geographic location

(4) A charter school that receives approval of its petition from a county board of education or from the state board on appeal shall be subject to the same requirements concerning geographic location to which it would otherwise be subject if it received approval from the chartering authority to which it originally submitted its petition. A charter petition that is submitted to either a county board of education or to the state board shall meet all otherwise applicable petition requirements, including the identification of the proposed site or sites where the charter school will operate.

Notice of approval to state

(5) Upon the approval of the petition by the county board of education, the petitioner [sic: petitioner] or petitioners shall provide written notice of that approval, including a copy of the petition, to the governing board of the school district in which the charter school is located, the department, and the state board.

Failure to act on appeal

(6) If either the county board of education or the state board fails to act on a petition within 180 days of receipt, the decision of the governing board of the school district to deny the petition shall be subject to judicial review.

Teacher credentialing requirements

(l)(1) Teachers in charter schools shall hold the Commission on Teacher Credentialing certificate, permit, or other document required for the teacher's certificated assignment. These documents shall be maintained on file at the charter school and are subject to periodic inspection by the chartering authority. A governing body of a direct-funded charter school may use local assignment options authorized in statute and regulations for the purpose of legally assigning certificated teachers, in accordance with all of the requirements of the applicable statutes or regulations in the same manner as a governing board of a school district. A charter school shall have authority to request an emergency permit or a waiver from the Commission on Teacher Credentialing for individuals in the same manner as a school district.

(2) By July 1, 2020, all teachers in charter schools shall obtain a certificate of clearance and satisfy the requirements for professional fitness pursuant to Sections 44339, 44340, and 44341.

(3) The Commission on Teacher Credentialing shall include in the bulletins it issues pursuant to subdivision (k) of Section 44237 to provide notification to local educational agencies of any adverse actions taken against the holders of any commission documents, notice of any adverse actions taken against teachers employed by charter schools and shall make this bulletin available to all chartering authorities and charter schools in the same manner in which it is made available to local educational agencies.

Annual financial audits

(m) A charter school shall transmit a copy of its annual, independent financial audit report for the preceding fiscal year, as described in subparagraph (l) of paragraph (5) of subdivision (c), to its chartering authority, the Controller, the county superintendent of schools of the county in which the charter school is sited, unless the county board of education of the county in which the charter school is sited is the chartering authority, and the department by December 15 of each year. This subdivision does not apply if the audit of the charter school is encompassed in the audit of the chartering authority pursuant to Section 41020.

Parent involvement

(n) A charter school may encourage parental involvement, but shall notify the parents and guardians of applicant pupils and currently enrolled pupils that parental involvement is not a requirement for acceptance to, or continued enrollment at, the charter school.

No SBE waiver

(o) The requirements of this section shall not be waived by the state board pursuant to Section 33050 or any other law.

Section 47605.1

Location; geographic and site limitations

(a) (1) Notwithstanding any other law, a charter school that is granted a charter from the governing board of a school district or county office of education after July 1, 2002, and commences providing educational services to pupils on or after July 1, 2002, shall locate in accordance with the geographic and site limitations of this part.

(2) Notwithstanding any other law, a charter school that is granted a charter by the state board after July 1, 2002, and commences providing educational services to pupils on or after July 1, 2002, based on the denial of a petition by the governing board of a school district or county board

Section 47605.1
Location; geographic
and site limitations
(continued)

of education, as described in paragraphs (1) and (2) of subdivision (j) of Section 47605, may locate only within the geographic boundaries of the chartering entity that initially denied the petition for the charter.

(3) A charter school that receives approval of its charter from a governing board of a school district, a county office of education, or the state board before July 1, 2002, but does not commence operations until after January 1, 2003, shall be subject to the geographic limitations of this part, in accordance with subdivision (d).

(b) This section is not intended to affect the admission requirements contained in subdivision (d) of Section 47605.

(c) (1) A charter school may establish one resource center, meeting space, or other satellite facility within the jurisdiction of the school district where the charter school is physically located if the following conditions are met:

(A) The facility is used exclusively for the educational support of pupils who are enrolled in nonclassroom-based independent study of the charter school.

(B) The charter school provides its primary educational services in, and a majority of the pupils it serves are residents of, the county in which the charter school is authorized.

(2) Except as provided in paragraphs (5) to (9), inclusive, a charter school shall not establish a resource center, meeting space, or other satellite facility in any other location than the one authorized in paragraph (1).

(3) A charter school shall notify the charter school's chartering authority of the name and physical location of any resource center, meeting space, or other satellite facility operated by that charter school.

(4) Notwithstanding Section 33050 or any other law, the state board shall not waive the restrictions listed in this subdivision.

(5) (A) A charter school that was operating a resource center, meeting space, or other satellite facility outside the jurisdiction of the school district where the charter school is physically located before January 1, 2020, may continue to operate the resource center, meeting space, or other satellite facility until the charter school submits a request for the renewal of its charter petition. To continue operating the resource center, meeting space, or other satellite facility, the charter school, before submitting the request to the charter school's chartering authority for the renewal of the charter petition, shall first obtain approval in writing from the school district where the resource center, meeting space, or other satellite facility is operating.

(B) The department shall regard as a continuing charter school for all purposes a nonclassroom-based charter school that was granted approval of its petition, that was providing educational services to pupils before October 1, 2019, and is authorized by a different chartering authority due to changes to this subdivision by the addition of this paragraph that took effect January 1, 2020.

(6) A countywide charter school approved by a county office of education that is operating a resource center, meeting space, or other satellite facility in a county other than the county in which the countywide charter school is authorized before January 1, 2020, may continue to operate that resource center, meeting space, or other satellite facility until the countywide charter school submits a request for the renewal of its charter petition. To continue operating the resource center, meeting space, or other satellite facility, the countywide charter school, before submitting the request to the countywide charter school's chartering authority for the renewal of the charter petition, shall obtain approval in writing from the county office of education where the resource center, meeting space, or other satellite facility is operating.

(7) If a Presidential declaration of a major disaster or emergency is issued in accordance with the federal Robert T. Stafford Disaster Relief and Emergency Assistance Act (42 U.S.C. Sec. 5121 et seq.) for an area in which a charter school is operating a resource center, meeting space, or other satellite facility, the charter school, for not more than five years, may relocate the resource center, meeting space, or other satellite facility outside the area subject to the Presidential declaration if the charter school first obtains the written approval of the school district where the resource center, meeting space, or other satellite facility is being relocated to.

(8) A charter school may establish additional resource centers, meetings spaces, or other satellite facilities within the jurisdiction of the charter school's chartering authority only if both of the following are met:

(A) The charter school is physically located within the boundaries of the charter school's chartering authority.

(B) The charter school has obtained written approval from the charter school's chartering authority for each additional resource center, meeting space, or other satellite facility.

(9) (A) Notwithstanding paragraph (5), a charter school that operates a resource center located in a school district outside of the boundaries of the charter school's authorizing school district may continue to operate the existing resource center if all of the following conditions are met:

(i) The charter school operating the resource center is authorized by, and physically located in, a school district adjacent to a school district with an enrollment of at least 500,000 pupils.

(ii) The charter school operating the resource center was established before January 1, 2009.

Resource center located within jurisdiction of school district where school is located; conditions

Continuing operation of facility located outside district boundaries; approval requirement

Countywide charter schools; location limitations

Presidential declaration of major disaster or emergency

Additional resource centers; requirements

Resource centers located outside of boundaries of authorizing district; requirements

Section 47605.1
Location; geographic
and site limitations
(continued)

Limits for county-
authorized charter schools

Exemptions to location limitations

- (iii) The resource center is physically located in a school district with an enrollment of at least 500,000 pupils and was established before January 1, 2011.
- (iv) The resource center serves a pupil population of which at least 50 percent of the pupils are currently or formerly on probation or were formerly incarcerated individuals.
- (B) A charter school described in this paragraph shall not establish a new resource center outside of the boundaries of the charter school's authorizing school district.
- (d) (1) For a charter school that was granted approval of its charter before July 1, 2002, and provided educational services to pupils before July 1, 2002, this section only applies to new educational services or schoolsites established or acquired by the charter school on or after July 1, 2002.
- (2) For a charter school that was granted approval of its charter before July 1, 2002, but did not provide educational services to pupils before July 1, 2002, this section only applies upon the expiration of a charter that is in existence on January 1, 2003.
- (3) Notwithstanding other implementation timelines in this section, by June 30, 2005, or upon the expiration of a charter that is in existence on January 1, 2003, whichever is later, all charter schools shall be required to comply with this section for schoolsites at which educational services are provided to pupils before or after July 1, 2002, regardless of whether the charter school initially received approval of its charter school petition before July 1, 2002. To achieve compliance with this section, a charter school shall be required to receive approval of a charter petition in accordance with this section and Section 47605.
- (4) This section is not intended to affect the authority of a governmental entity to revoke a charter that is granted on or before the effective date of this section.
- (e) A charter school that submits its petition directly to a county board of education, as authorized by Section 47605.5 or 47605.6, may establish charter school operations only within the geographical boundaries of the county in which that county board of education has jurisdiction.
- (f) Notwithstanding any other law, the jurisdictional limitations set forth in this section do not apply to a charter school that provides instruction exclusively in partnership with any of the following:
 - (1) The federal Workforce Innovation and Opportunity Act (29 U.S.C. Sec. 3101 et seq.).
 - (2) Federally affiliated Youth Build programs.
 - (3) Federal job corps training or instruction provided pursuant to a memorandum of understanding with the federal provider.
 - (4) The California Conservation Corps or local conservation corps certified by the California Conservation Corps pursuant to Sections 14507.5 or 14406 of the Public Resources Code.
 - (5) Instruction provided to juvenile court school pupils pursuant to subdivision (b) of Section 42238.18 or pursuant to Section 1981 for individuals who are placed in a residential facility.

Section 47605.2
Delta Charter High School

The Delta Charter High School, located in the County of Santa Cruz, is exempt from the geographic and site limitations contained in subdivision (a) of Section 47605.

Section 47605.3
Admissions preferences
for certain elementary schools

Notwithstanding subdivision (e) of Section 47605, a charter school with a schoolsite physically located in the attendance area of a public elementary school in which 50 percent or more of the pupil enrollment is eligible for free or reduced price meals may give a preference in admissions to pupils who are currently enrolled in that public elementary school and to pupils who reside in the elementary school attendance area where the charter schoolsite is located. This section is not intended to affect the requirement contained in subdivision (e) of Section 47605 that a public school converting partially or entirely to a charter school adopt and maintain a policy that gives an admission preference to pupils who reside within the former attendance area of that public school.

Section 47605.4
Teachers to obtain certificate
required for certificated assignment

- (a) Notwithstanding subdivision (l) of Section 47605, teachers employed by charter schools during the 2019-20 school year shall have until July 1, 2025, to obtain the certificate required for the teacher's certificated assignment.
- (b) By June 30, 2022, the Commission on Teacher Credentialing shall conduct a comprehensive study to examine whether existing certificates, permits, or other documents adequately address the needs for noncore, noncollege preparatory courses in all schools. Based on the findings, the commission shall consider establishing new or modifying existing certificates, permits, or other documents and, if necessary, shall make recommendations to the appropriate policy committees of the Legislature.
- (c) Subdivision (a) does not lessen the requirements on charter schools regarding allegations of misconduct pursuant to Sections 44030.5, 44420, and 44940 of this code and Section 80303 of Title 5 of the California Code of Regulations.
- (d) This section shall remain in effect only until January 1, 2026, and as of that date is repealed.

Section 47605.5
County charters

A petition may be submitted directly to a county board of education in the same manner as set forth in Section 47605 for charter schools that will serve pupils for whom the county office of education would otherwise be responsible for providing direct education and related services. Any denial of a petition shall be subject to the same process for any other county board of education denial of a charter school petition pursuant to this part.

(a) (1) In addition to the authority provided by Section 47605.5, a county board of education may also approve a petition for the operation of a charter school that operates at one or more sites within the geographic boundaries of the county and that provides instructional services that are not generally provided by a county office of education. A county board of education may approve a countywide charter only if it finds, in addition to the other requirements of this section, that the educational services to be provided by the charter school will offer services to a pupil population that will benefit from those services and that cannot be served as well by a charter school that operates in only one school district in the county. A petition for the establishment of a countywide charter school pursuant to this subdivision may be circulated throughout the county by any one or more persons seeking to establish the charter school. The petition may be submitted to the county board of education for review after either of the following conditions is met:

(A) The petition is signed by a number of parents or guardians of pupils residing within the county that is equivalent to at least one-half of the number of pupils that the charter school estimates will enroll in the school for its first year of operation and each of the school districts where the charter school petitioner proposes to operate a facility has received at least 30 days' notice of the petitioner's intent to operate a charter school pursuant to this section.

(B) The petition is signed by a number of teachers that is equivalent to at least one-half of the number of teachers that the charter school estimates will be employed at the school during its first year of operation and each of the school districts where the charter school petitioner proposes to operate a facility has received at least 30 days' notice of the petitioner's intent to operate a charter school pursuant to this section.

(2) An existing public school shall not be converted to a charter school in accordance with this section.

(3) After receiving approval of its petition, a charter school that proposes to establish operations at additional sites within the geographic boundaries of the county board of education shall notify the school districts where those sites will be located. The charter school shall also request a material revision of its charter by the county board of education that approved its charter and the county board of education shall consider whether to approve those additional locations at an open, public meeting, held no sooner than 30 days following notification of the school districts where the sites will be located. If approved, the location of the approved sites shall be a material revision of the charter school's approved charter.

(4) A petition shall include a prominent statement indicating that a signature on the petition means that the parent or guardian is meaningfully interested in having their child or ward attend the charter school, or in the case of a teacher's signature, means that the teacher is meaningfully interested in teaching at the charter school. The proposed charter shall be attached to the petition.

(b) No later than 60 days after receiving a petition, in accordance with subdivision (a), the county board of education shall hold a public hearing on the provisions of the charter, at which time the county board of education shall consider the level of support for the petition by teachers, parents or guardians, and the school districts where the charter school petitioner proposes to place school facilities. Following review of the petition and the public hearing, the county board of education shall either grant or deny the charter within 90 days of receipt of the petition. However, this date may be extended by an additional 30 days if both parties agree to the extension. A petition is deemed received by the county board of education for purposes of commencing the timelines described in this subdivision when the petitioner submits a petition, in accordance with subparagraph (A) or (B) of paragraph (1) of subdivision (a), to the county office of education. The county board of education shall publish all staff recommendations, including the recommended findings, regarding the petition at least 15 days before the public hearing at which the county board of education will either grant or deny the charter. At the public hearing at which the county board of education will either grant or deny the charter, petitioners shall have equivalent time and procedures to present evidence and testimony to respond to the staff recommendations and findings. A county board of education may impose any additional requirements beyond those required by this section that it considers necessary for the sound operation of a countywide charter school. A county board of education may grant a charter for the operation of a charter school under this part only if it is satisfied that granting the charter is consistent with sound educational practice and that the charter school has reasonable justification for why it could not be established by petition to a school district pursuant to Section 47605. The county board of education shall deny a petition for the establishment of a charter school if it finds one or more of the following:

(1) The charter school presents an unsound educational program for the pupils to be enrolled in the charter school.

(2) The petitioners are demonstrably unlikely to successfully implement the program set forth in the petition.

(3) The petition does not contain the number of signatures required by subdivision (a).

(4) The petition does not contain an affirmation of each of the conditions described in subdivision (e).

(5) The petition does not contain reasonably comprehensive descriptions of all of the following:

(A) (i) The educational program of the charter school, designed, among other things, to identify those pupils whom the charter school is attempting to educate, what it means to be an "educated person" in the 21st century, and how learning best occurs. The goals identified in that program

Section 47605.6

Countywide petitions

Standard for countywide charter

Signatures and local district notices prior to submission

No conversion

Additional sites require notice; material revision

Signature indicates meaningful interest

Public hearing timelines

Publication of staff recommendations

Standards for approval

Denial findings

Unsound educational program

Unlikely to implement program successfully

Comprehensive elements

Description of educational program

Section 47605.6
Countywide petitions

(continued)

Description of annual goals aligned with applicable state priorities

shall include the objective of enabling pupils to become self-motivated, competent, and lifelong learners.

High schools;
transferability of courses

(ii) The annual goals for the charter school for all pupils and for each subgroup of pupils identified pursuant to Section 52052, to be achieved in the state priorities, as described in subdivision (d) of Section 52060, that apply for the grade levels served by the charter school, and specific annual actions to achieve those goals. A charter petition may identify additional school priorities, the goals for the school priorities, and the specific annual actions to achieve those goals.

High schools;
college entrance requirements

(iii) If the proposed charter school will enroll high school pupils, the manner in which the charter school will inform parents regarding the transferability of courses to other public high schools. Courses offered by the charter school that are accredited by the Western Association of Schools and Colleges may be considered to be transferable to other public high schools.

Measurable pupil outcomes schoolwide and for all pupil groups

(iv) If the proposed charter school will enroll high school pupils, information as to the manner in which the charter school will inform parents as to whether each individual course offered by the charter school meets college entrance requirements. Courses approved by the University of California or the California State University as satisfying their prerequisites for admission may be considered as meeting college entrance requirements for purposes of this clause.

Method to measure pupil outcomes

(B) The measurable pupil outcomes identified for use by the charter school. "Pupil outcomes," for purposes of this part, means the extent to which all pupils of the charter school demonstrate that they have attained the skills, knowledge, and aptitudes specified as goals in the charter school's educational program. Pupil outcomes shall include outcomes that address increases in pupil academic achievement both schoolwide and for all pupil subgroups served by the charter school, as that term is defined in subdivision (a) of Section 52052. The pupil outcomes shall align with the state priorities, as described in subdivision (d) of Section 52060, that apply for the grade levels served by the charter school.

Locations

(C) The method by which pupil progress in meeting those pupil outcomes is to be measured. To the extent practicable, the method for measuring pupil outcomes for state priorities shall be consistent with the way information is reported on a school accountability report card.

Governance structure

(D) The location of each charter school facility that the petitioner proposes to operate.

Employee qualifications
Health and safety procedures

(E) The governance structure of the charter school, including, but not limited to, the process to be followed by the charter school to ensure parental involvement.

Employee criminal record

(F) The qualifications to be met by individuals to be employed by the charter school.

School safety plan

(G) The procedures that the charter school will follow to ensure the health and safety of pupils and staff. These procedures shall require all of the following

Balance of racial and ethnic pupils, special education pupils, and ELL pupils reflective of general population within jurisdiction

(i) That each employee of the charter school furnish the charter school with a criminal record summary as described in Section 44237.

(ii) For all schools, the development of a school safety plan, which shall include the safety topics listed in subparagraphs (A) to (K), inclusive, of paragraph (2) of subdivision (a) of Section 32282. For schools serving pupils in any of grades 7 to 12, inclusive, the development of a school safety plan shall also include the safety topic listed in subparagraph (L) of paragraph (2) of subdivision (a) of Section 32282.

(iii) That the school safety plan be reviewed and updated by March 1 of every year by the charter school.

Annual financial audits

(H) The means by which the charter school will achieve a balance of racial and ethnic pupils, special education pupils, and English learner pupils, including redesignated fluent English proficient pupils as defined by the evaluation rubrics in Section 52064.5, that is reflective of the general population residing within the territorial jurisdiction of the county board of education to which the charter petition is submitted. Upon renewal, for a charter school not deemed to be a local educational agency for purposes of special education pursuant to Section 47641, the chartering authority may consider the effect of school placements made by the chartering authority in providing a free and appropriate public education as required by the federal Individuals with Disabilities Education Act (Public Law 101-476), on the balance of pupils with disabilities at the charter school.

Suspension and expulsion procedures

(I) The manner in which annual, independent financial audits shall be conducted, in accordance with regulations established by the state board, and the manner in which audit exceptions and deficiencies shall be resolved.

Suspensions less than 10 days

(J) The procedures by which pupils can be suspended or expelled from the charter school for disciplinary reasons or otherwise involuntarily removed from the charter school for any reason. These procedures, at a minimum, shall include an explanation of how the charter school will comply with federal and state constitutional procedural and substantive due process requirements that is consistent with all of the following:

Suspensions 10 or more days or all other expulsions

(i) For suspensions of fewer than 10 days, provide oral or written notice of the charges against the pupil and, if the pupil denies the charges, an explanation of the evidence that supports the charges and an opportunity for the pupil to present the pupil's side of the story.

(ii) For suspensions of 10 days or more and all other expulsions for disciplinary reasons, both of the following:

(I) Provide timely, written notice of the charges against the pupil and an explanation of the pupil's basic rights.

(II) Provide a hearing adjudicated by a neutral officer within a reasonable number of days at which

Section 47605.6
Countywide petitions
(continued)

the pupil has a fair opportunity to present testimony, evidence, and witnesses and confront and cross-examine adverse witnesses, and at which the pupil has the right to bring legal counsel or an advocate.

(iii) Contain a clear statement that no pupil shall be involuntarily removed by the charter school for any reason unless the parent or guardian of the pupil has been provided written notice of intent to remove the pupil no less than five schooldays before the effective date of the action. The written notice shall be in the native language of the pupil or the pupil's parent or guardian, or, if the pupil is a homeless child or youth, or a foster child or youth, in the native language of the homeless or foster child's educational rights holder. In the case of a foster child or youth, the written notice shall also be provided to the foster child's attorney and county social worker. If the pupil is a Indian child, as defined in Section 224.1 of the Welfare and Institutions Code, the written notice shall also be provided to the Indian child's tribal social worker and, if applicable, county social worker. The written notice shall inform the pupil, the pupil's parent or guardian, the homeless child's educational rights holder, the foster child's educational rights holder, attorney, and county social worker, or the Indian child's tribal social worker and, if applicable, county social worker of the right to initiate the procedures specified in clause (ii) before the effective date of the action. If the pupil's parent or guardian, the homeless child's educational rights holder, the foster child's educational rights holder, attorney, or county social worker, or the Indian child's tribal social worker or, if applicable, county social worker initiates the procedures specified in clause (ii), the pupil shall remain enrolled and shall not be removed until the charter school issues a final decision. For purposes of this clause, "involuntarily removed" includes disenrolled, dismissed, transferred, or terminated, but does not include suspensions specified in clauses (i) and (ii).

(iv) A foster child's educational rights holder, attorney, and county social worker and an Indian child's tribal social worker and, if applicable, county social worker shall have the same rights a parent or guardian of a child has to receive a suspension notice, expulsion notice, manifestation determination notice, involuntary transfer notice, and other documents and related information.

(K) The manner by which staff members of the charter school will be covered by the State Teachers' Retirement System, the Public Employees' Retirement System, or federal social security.

(L) The procedures to be followed by the charter school and the county board of education to resolve disputes relating to provisions of the charter.

(M) Admission policy and procedures, consistent with subdivision (e).

(N) The public school attendance alternatives for pupils residing within the county who choose not to attend the charter school.

(O) The rights of an employee of the county office of education, upon leaving the employment of the county office of education, to be employed by the charter school, and any rights of return to the county office of education that an employee may have upon leaving the employment of the charter school.

(P) The procedures to be used if the charter school closes. The procedures shall ensure a final audit of the charter school to determine the disposition of all assets and liabilities of the charter school, including plans for disposing of any net assets and for the maintenance and transfer of public records.

(6) A declaration of whether or not the charter school shall be deemed the exclusive public school employer of the employees of the charter school for purposes of the Educational Employment Relations Act (Chapter 10.7 (commencing with Section 3540) of Division 4 of Title 1 of the Government Code).

(7) Any other basis that the county board of education finds justifies the denial of the petition.

(c) A county board of education that approves a petition for the operation of a countywide charter may, as a condition of charter approval, enter into an agreement with a third party, at the expense of the charter school, to oversee, monitor, and report to the county board of education on the operations of the charter school. The county board of education may prescribe the aspects of the charter school's operations to be monitored by the third party and may prescribe appropriate requirements regarding the reporting of information concerning the operations of the charter school to the county board of education.

(d) (1) Charter schools shall meet all statewide standards and conduct the pupil assessments required pursuant to Section 60605 and any other statewide standards authorized in statute or pupil assessments applicable to pupils in noncharter public schools.

(2) Charter schools shall on a regular basis consult with their parents and teachers regarding the charter school's educational programs.

(e) (1) In addition to any other requirement imposed under this part, a charter school shall be nonsectarian in its programs, admission policies, employment practices, and all other operations, shall not charge tuition, and shall not discriminate against any pupil on the basis of ethnicity, national origin, gender, gender identity, gender expression, or disability. Except as provided in paragraph (2), admission to a charter school shall not be determined according to the place of residence of the pupil, or of the pupil's parent or guardian, within this state.

(2) (A) A charter school shall admit all pupils who wish to attend the charter school.

(B) If the number of pupils who wish to attend the charter school exceeds the charter school's capacity, attendance, except for existing pupils of the charter school, shall be determined by a public random drawing. Preference shall be extended to pupils currently attending the charter school and pupils who reside in the county except as provided for in Section 47614.5. Preferences,

Involuntary removals

Foster and Indian children social worker's rights

STRS, PERS or social security

Dispute resolution

Admission policies

Attendance alternatives

Return rights of employees

School closure procedures

Exclusive public employer

Denial on other basis

Charge for third-party oversight

Statewide standards and pupil assessments

Consultation with parents and students

Nonsectarian, tuition-free and nondiscriminatory

Admit all pupils

Public random drawing;

preferences must be approved

Section 47605.6
Countywide petitions

(continued)

	<p>including, but not limited to, siblings of pupils admitted or attending the charter school and children of the charter school's teachers, staff, and founders identified in the initial charter, may also be permitted by the chartering authority on an individual charter school basis. Priority order for any preference shall be determined in the charter petition in accordance with all of the following:</p> <p>(i) Each type of preference shall be approved by the chartering authority at a public hearing.</p> <p>(ii) Preferences shall be consistent with federal law, the California Constitution, and Section 200.</p> <p>(iii) Preferences shall not result in limiting enrollment access for pupils with disabilities, academically low-achieving pupils, English learners, neglected or delinquent pupils, homeless pupils, or pupils who are economically disadvantaged, as determined by eligibility for any free or reduced-price meal program, foster youth, or pupils based on nationality, race, ethnicity, or sexual orientation.</p> <p>(iv) In accordance with Section 49011, preferences shall not require mandatory parental volunteer hours as a criterion for admission or continued enrollment.</p>
Efforts to accommodate growth	<p>(C) In the event of a drawing, the county board of education shall make reasonable efforts to accommodate the growth of the charter school and in no event shall take any action to impede the charter school from expanding enrollment to meet pupil demand.</p>
Notice of student expulsions and withdrawals	<p>(3) If a pupil is expelled or leaves the charter school without graduating or completing the school year for any reason, the charter school shall notify the superintendent of the school district of the pupil's last known address within 30 days and shall, upon request, provide that school district with a copy of the cumulative record of the pupil, including report cards or a transcript of grades, and health information. If the pupil is subsequently expelled or leaves the school district without graduating or completing the school year for any reason, the school district shall provide this information to the charter school within 30 days if the charter school demonstrates that the pupil had been enrolled in the charter school. This paragraph applies only to pupils subject to compulsory full-time education pursuant to Section 48200.</p>
Discouraging enrollment	<p>(4) (A) A charter school shall not discourage a pupil from enrolling or seeking to enroll in the charter school for any reason, including, but not limited to, academic performance of the pupil or because the pupil exhibits any of the characteristics described in clause (iii) of subparagraph (B) of paragraph (2).</p> <p>(B) A charter school shall not request a pupil's records or require a parent, guardian, or pupil to submit the pupil's records to the charter school before enrollment.</p>
Requesting pupil records prior to enrollment	<p>(C) A charter school shall not encourage a pupil currently attending the charter school to disenroll from the charter school or transfer to another school for any reason, including, but not limited to, academic performance of the pupil or because the pupil exhibits any of the characteristics described in clause (iii) of subparagraph (B) of paragraph (2). This subparagraph shall not apply to actions taken by a charter school pursuant to the procedures described in subparagraph (J) of paragraph (5) of subdivision (b).</p>
Encouraging disenrollment	
Enrollment/disenrollment notice requirements	<p>(D) The department shall develop a notice of the requirements of this paragraph. This notice shall be posted on a charter school's internet website. A charter school shall provide a parent or guardian, or a pupil if the pupil is 18 years of age or older, a copy of this notice at all of the following times:</p> <p>(i) When a parent, guardian, or pupil inquiries about enrollment.</p> <p>(ii) Before conducting an enrollment lottery.</p> <p>(iii) Before disenrollment of a pupil.</p>
Enrollment complaint procedures	<p>(E) (i) A person who suspects that a charter school has violated this paragraph may file a complaint with the chartering authority.</p> <p>(ii) The department shall develop a template to be used for filing complaints pursuant to clause (i).</p>
Dismissing pupils who fail to maintain standards of the military	<p>(5) Notwithstanding any other law, a charter school in operation as of July 1, 2019, that operates in partnership with the California National Guard may dismiss a pupil from the charter school for failing to maintain the minimum standards of conduct required by the Military Department.</p>
No charter school employment required	<p>(f) The county board of education shall not require an employee of the county or a school district to be employed in a charter school.</p>
No charter school enrollment required	<p>(g) The county board of education shall not require a pupil enrolled in a county program to attend a charter school.</p>
Information on facilities, administrative services and civil liabilities	<p>(h) The county board of education shall require that the petitioner or petitioners provide information regarding the proposed operation and potential effects of the charter school, including, but not limited to, the facilities to be used by the charter school, the manner in which administrative services of the charter school are to be provided, and potential civil liability effects, if any, upon the charter school, any school district where the charter school may operate, and upon the county board of education. The petitioner or petitioners shall also be required to provide financial statements that include a proposed first-year operational budget, including startup costs, and cashflow and financial projections for the first three years of operation. If the charter school is to be operated by, or as, a nonprofit public benefit corporation, the petitioner shall provide the names and relevant qualifications of all persons whom the petitioner nominates to serve on the governing body of the charter school.</p>
Financial statements and proposed first-year budget	
Preference to school for low-achieving pupils	<p>(i) In reviewing petitions for the establishment of charter schools within the county, the county board of education shall give preference to petitions that demonstrate the capability to provide comprehensive learning experiences to pupils identified by the petitioner or petitioners as</p>

academically low achieving pursuant to the standards established by the department under Section 54032, as that section read before July 19, 2006.

(j) Upon the approval of the petition by the county board of education, the petitioner or petitioners shall provide written notice of that approval, including a copy of the petition, to the school districts within the county, the Superintendent, and the state board.

(k) If a county board of education denies a petition, the petitioner shall not elect to submit the petition for the establishment of the charter school to the state board.

(l) (1) Teachers in charter schools shall be required to hold the Commission on Teacher Credentialing certificate, permit, or other document required for the teacher's certificated assignment. These documents shall be maintained on file at the charter school and shall be subject to periodic inspection by the chartering authority. A governing body of a direct-funded charter school may use local assignment options authorized in statute and regulations for the purpose of legally assigning certificated teachers, in accordance with all of the requirements of the applicable statutes or regulations in the same manner as a governing board of a school district. A charter school shall have authority to request an emergency permit or a waiver from the Commission on Teacher Credentialing for individuals in the same manner as a school district.

(2) The Commission on Teacher Credentialing shall include in the bulletins it issues pursuant to subdivision (k) of Section 44237 to provide notification to local educational agencies of any adverse actions taken against the holders of any commission documents, notice of any adverse actions taken against teachers employed by charter schools. The Commission on Teacher Credentialing shall make this bulletin available to all chartering authorities and charter schools in the same manner in which it is made available to local educational agencies.

(m) A charter school shall transmit a copy of its annual, independent, financial audit report for the preceding fiscal year, as described in subparagraph (l) of paragraph (5) of subdivision (b), to the county office of education, the Controller, and the department by December 15 of each year. This subdivision does not apply if the audit of the charter school is encompassed in the audit of the chartering authority pursuant to Section 41020.

(n) A charter school may encourage parental involvement but shall notify the parents and guardians of applicant pupils and currently enrolled pupils that parental involvement is not a requirement for acceptance to, or continued enrollment at, the charter school.

(o) The requirements of this section shall not be waived by the state board pursuant to Section 33050 or any other law.

(a) A petition for the establishment of a charter school shall not be denied based on the actual or potential costs of serving individuals with exceptional needs, as that term is defined pursuant to Section 56026.

(b) Notwithstanding subdivision (a), this section shall not be construed to prevent a school district from meeting its obligation to ensure that the proposed charter school will meet the needs of individuals with exceptional needs in accordance with state and federal law, nor shall it be construed to limit or alter the reasons for denying a petition for the establishment of a charter school pursuant to subdivision (c) of Section 47605.

(a) A petition to establish a charter school under this part may be submitted only to the governing board of the school district or county office of education within the boundaries of which the charter school proposes to locate.

(b) A charter school operating under a charter approved by the state board pursuant to Section 47605, as that section read on January 1, 2019, may continue to operate under the authority of that chartering authority only until the date on which the charter is up for renewal, at which point the charter school shall submit a petition for renewal to the governing board of the school district within the boundaries of which the charter school is located. If the governing board of the school district denies the renewal petition, the charter school may submit the petition for renewal directly to the state board, which shall review the petition in accordance with subparagraph (B) of paragraph (1) of subdivision (k) of Section 47605. If the state board grants renewal pursuant to Section 47607, the state board shall designate, in consultation with the petitioner, either the governing board of the school district or the county board of education in which the charter school is located as the chartering authority. Subsequent renewals shall be subject to the same requirements as other charter schools authorized by the designated chartering authority, including review by the state board in accordance with Section 47607 and paragraph (2) of subdivision (k) of Section 47605.

(c) A charter school operating under a charter approved by the state board pursuant to Section 47605.8, as that section read on January 1, 2019, may continue to operate under the authority of that chartering authority only until the date on which the charter is up for renewal. The charter school shall submit a petition for renewal to the state board. If the state board grants renewal pursuant to Section 47607, the state board shall designate, in consultation with the petitioner, the governing board of the school district or county board of education in which the charter school is located as the chartering authority. A charter school assigned to a county board of education under this subdivision shall qualify as a charter school pursuant to Section 47605.6.

Section 47605.6
Countywide petitions
(continued)

Notice of approval to district and state

No appeal to state board

Notification of adverse actions

Annual financial audit distribution

Parent involvement
not a condition of enrollment

No SBE waiver

Section 47605.7
**No denial based on costs of serving
students with special needs**

Section 47605.9
**Permissible authorizers; existing
state-approved schools**

Continuing charters approved by SBE
on appeal

Continuing statewide benefit charters

Section 47605.9
Permissible authorizers; existing state-approved schools
(continued)

No SBE waiver

Subsequent renewals shall be subject to the same requirements as other charter schools authorized by the same chartering authorities, including review by the state board in accordance with Section 47607 and paragraph (2) of subdivision (k) of Section 47605.

(d) A charter school designated to a new chartering authority pursuant to this section shall be regarded by the department as a continuing charter school for all purposes.

(e) The requirements of this section shall not be waived by the state board pursuant to Section 33050 or any other law.

Section 47606
Charter Districts

(a) A school district may convert all of its schools to charter schools under this part only if it meets all of the following conditions:

(1) Fifty percent of the teachers within the school district sign the charter petition.

(2) The charter petition contains all of the requirements set forth in subdivisions (c), (d), (e), (f), and (g) of Section 47605 and a provision that specifies alternative public school attendance arrangements for pupils residing within the school district who choose not to attend charter schools.

(b) Notwithstanding subdivision (b) of Section 47605, the districtwide charter petition shall be approved only by joint action of the Superintendent of Public Instruction and the State Board of Education.

Section 47606.2
Suspension procedures

Homework assignments during suspension

A petition to establish a charter school shall contain, in addition to the reasonably comprehensive description of the procedures by which pupils can be suspended or expelled from the charter school for disciplinary reasons or otherwise involuntarily removed from the charter school for any reason and the explanation of how the charter school will comply with federal and state constitutional procedural and substantive due process requirements that are required by Section 47605, a statement that the suspension procedures will include both of the following requirements:

(a) Upon the request of a parent, a legal guardian or other person holding the right to make education decisions for the pupil, or the affected pupil, a teacher shall provide to a pupil in any of grades 1 to 12, inclusive, who has been suspended from school for two or more schooldays, the homework that the pupil would otherwise have been assigned.

(b) If a homework assignment that is requested pursuant to subdivision (a) and turned into the teacher by the pupil either upon the pupil's return to school from suspension or within the timeframe originally prescribed by the teacher, whichever is later, is not graded before the end of the academic term, that assignment shall not be included in the calculation of the pupil's overall grade in the class.

Section 47606.5
LCAP and annual update

Consult with stakeholders during LCAP development

Public hearing requirement

(a) On or before July 1, 2015, and each year thereafter, the governing body of a charter school shall hold a public hearing to adopt a local control and accountability plan using a template adopted by the state board. The governing body of a charter school shall update the goals and annual actions to achieve those goals identified in the charter petition pursuant to subparagraph (A) of paragraph (5) of subdivision (c) of Section 47605 or subparagraph (A) of paragraph (5) of subdivision (b) of Section 47605.6, as applicable, using the template for the local control and accountability plan and annual update to the local control and accountability plan adopted by the state board pursuant to Section 52064 and shall include all of the following:

(1) A review of the progress toward the goals included in the charter, an assessment of the effectiveness of the specific actions described in the charter toward achieving the goals, and a description of changes to the specific actions the charter school will make as a result of the review and assessment.

(2) A listing and description of the expenditures for the fiscal year implementing the specific actions included in the charter as a result of the reviews and assessment required by paragraph (1).

(b) For purposes of the review required by subdivision (a), a governing body of a charter school may consider qualitative information, including, but not limited to, findings that result from school quality reviews conducted pursuant to subdivision (b) of Section 52052 or any other reviews.

(c) To the extent practicable, data reported pursuant to this section shall be reported in a manner consistent with how information is reported on the California School Dashboard maintained by the department pursuant to Section 52064.5.

(d) The charter school shall consult with teachers, principals, administrators, other school personnel, parents, and pupils in developing the local control and accountability plan and annual update to the local control and accountability plan.

(e) (1) The charter school shall present a report on the annual update to the local control and accountability plan and the local control funding formula budget overview for parents on or before February 28 of each year at a regularly scheduled meeting of the governing body of the charter school.

(2) The report shall include both of the following:

(A) All available midyear outcome data related to metrics identified in the current year's local control and accountability plan.

(B) All available midyear expenditure and implementation data on all actions identified in the

Section 47606.5
LCAP and annual update
(continued)

current year's local control and accountability plan.

(f) The governing body of a charter school shall hold at least one public hearing to solicit the recommendations and comments of members of the public regarding the specific actions and expenditures proposed to be included in the local control and accountability plan or annual update to the local control and accountability plan. The agenda for the public hearing shall be posted at least 72 hours before the public hearing, and the local control and accountability plan or annual update to the local control and accountability plan shall be made available for public inspection at each site operated by the charter school.

(g) The governing body of a charter school may adopt revisions to a local control and accountability plan during the period the local control and accountability plan is in effect. The governing body of a charter school may only adopt a revision to a local control and accountability plan if it follows the process to adopt a local control and accountability plan pursuant to this section and the revisions are adopted in a public meeting.

(h) Pursuant to Section 47604.33, the charter school shall submit the adopted or revised local control and accountability plan pursuant to this section to its chartering authority and the county superintendent of schools, or only to the county superintendent of schools if the county board of education is the chartering authority.

(i) The charter school shall prominently post on the home page of the internet website of the charter school any local control and accountability plan adopted by the governing body of the charter school, and any updates, revisions, or addenda, including those to comply with federal law, to a local control and accountability plan approved by the governing body of the charter school.

LCAP revisions

Website posting requirement

(a) (1) A charter may be granted pursuant to Sections 47605, 47605.5, 47605.6, and 47606 for a period not to exceed five years.

(2) A chartering authority may grant one or more subsequent renewals pursuant to subdivisions (b) and (c) and Section 47607.2. Notwithstanding subdivisions (b) and (c) and Section 47607.2, a chartering authority may deny renewal pursuant to subdivision (e).

(3) A charter school that, concurrently with its renewal, proposes to expand operations to one or more additional sites or grade levels shall request a material revision to its charter. A material revision of the provisions of a charter petition may be made only with the approval of the chartering authority. A material revision of a charter is governed by the standards and criteria described in Section 47605.

(4) The findings of paragraphs (7) and (8) of subdivision (c) of Section 47605 shall not be used to deny a renewal of an existing charter school, but may be used to deny a proposed expansion constituting a material revision. For a material revision, analysis under paragraphs (7) and (8) of subdivision (c) of Section 47605 shall be limited to consideration only of the impact of the proposed material revision.

(5) The chartering authority may inspect or observe any part of the charter school at any time.

(b) Renewals and material revisions of charters are governed by the standards and criteria described in Section 47605, and shall include, but not be limited to, a reasonably comprehensive description of any new requirement of charter schools enacted into law after the charter was originally granted or last renewed.

(c) (1) As an additional criterion for determining whether to grant a charter renewal, the chartering authority shall consider the performance of the charter school on the state and local indicators included in the evaluation rubrics adopted pursuant to Section 52064.5.

(2) (A) The chartering authority shall not deny renewal for a charter school pursuant to this subdivision if either of the following apply for two consecutive years immediately preceding the renewal decision:

(i) The charter school has received the two highest performance levels schoolwide on all the state indicators included in the evaluation rubrics adopted pursuant to Section 52064.5 for which it receives performance levels.

(ii) For all measurements of academic performance, the charter school has received performance levels schoolwide that are the same or higher than the state average and, for a majority of subgroups performing statewide below the state average in each respective year, received performance levels that are higher than the state average.

(B) Notwithstanding subparagraph (A), if the two consecutive years immediately preceding the renewal decision include the 2019–20 or 2020–21 school year, the chartering authority shall not deny renewal for a charter school if either of the following apply for two of the most recent years for which state data is available preceding the renewal decision:

(i) The charter school has received the two highest performance levels schoolwide on all the state indicators included in the evaluation rubrics adopted pursuant to Section 52064.5 for which it receives performance levels.

(ii) For all measurements of academic performance, the charter school has received performance levels schoolwide that are the same or higher than the state average and, for a majority of subgroups performing statewide below the state average in each respective year, received performance levels that are higher than the state average.

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Charter term;
renewals and revocation

Expanding operations to additional sites or grade levels is a material revision

Inspection of school
Renewals and material revisions

Additional criterion:
school performance on
state and local indicators

High Track; considerations

Section 47607

**Charter term;
renewals and revocation
(continued)**

Renewal for
five- and seven-year terms

Measurements of
academic performance

Qualifications for renewal;
sufficient performance levels

Dashboard indicators
unavailable; verifiable data

Alternative metrics

Data reflecting
pupil enrollment patterns

Finding that school is not serving all
pupils who wish to attend; evidence
supporting funding

(C) Notwithstanding subparagraphs (A) and (B), a charter school eligible for technical assistance pursuant to Section 47607.3 shall not qualify for renewal under this paragraph.

(D) A charter school that meets the criteria established by this paragraph and subdivision (a) of Section 47607.2 shall not qualify for treatment under this paragraph.

(E) The chartering authority that granted the charter may renew a charter pursuant to this paragraph for a period of between five and seven years.

(F) A charter that satisfies the criteria in subparagraph (A) or (B) shall only be required to update the petition to include a reasonably comprehensive description of any new requirement of charter schools enacted into law after the charter was originally granted or last renewed and as necessary to reflect the current program offered by the charter.

(3) For purposes of this section and Section 47607.2, "measurements of academic performance" means indicators included in the evaluation rubrics adopted pursuant to Section 52064.5 that are based on statewide assessments in the California Assessment of Student Performance and Progress system, or any successor system, the English Language Proficiency Assessments for California, or any successor system, and the college and career readiness indicator.

(4) For purposes of this section and Section 47607.2, "subgroup" means numerically significant pupil subgroups as defined in paragraph (1) of subdivision (a) of Section 52052.

(5) To qualify for renewal under clause (i) of subparagraph (A) or (B) of paragraph (2), subparagraph (A) of paragraph (1) or (2) of subdivision (a) of Section 47607.2, or paragraph (3) of subdivision (a) of Section 47607.2, the charter school shall have schoolwide performance levels on at least two measurements of academic performance per year in each of the two consecutive years immediately preceding the renewal decision. To qualify for renewal under clause (ii) of subparagraph (A) or (B) of paragraph (2), subparagraph (B) of paragraph (1) or (2) of subdivision (a) of Section 47607.2, or paragraph (3) of subdivision (a) of Section 47607.2, the charter school shall have performance levels on at least two measurements of academic performance for at least two subgroups. A charter school without sufficient performance levels to meet these criteria shall be considered under subdivision (b) of Section 47607.2.

(6) For purposes of this section and Section 47607.2, if the dashboard indicators are not yet available for the most recently completed academic year before renewal, the chartering authority shall consider verifiable data provided by the charter school related to the dashboard indicators, such as data from the California Assessment of Student Performance and Progress, or any successor system, for the most recent academic year.

(7) Paragraph (2) and subdivisions (a) and (b) of Section 47607.2 shall not apply to a charter school that is eligible for alternate methods for calculating the state and local indicators pursuant to subdivision (d) of Section 52064.5. In determining whether to grant a charter renewal for such a charter school, the chartering authority shall consider, in addition to the charter school's performance on the state and local indicators included in the evaluation rubrics adopted pursuant to subdivision (c) of Section 52064.5, the charter school's performance on alternative metrics applicable to the charter school based on the pupil population served. The chartering authority shall meet with the charter school during the first year of the charter school's term to mutually agree to discuss alternative metrics to be considered pursuant to this paragraph and shall notify the charter school of the alternative metrics to be used within 30 days of this meeting. The chartering authority may deny a charter renewal pursuant to this paragraph only upon making written findings, setting forth specific facts to support the findings, that the closure of the charter school is in the best interest of pupils.

(d) (1) At the conclusion of the year immediately preceding the final year of the charter school's term, the charter school authorizer may request, and the department shall provide, the following aggregate data reflecting pupil enrollment patterns at the charter school:

(A) The cumulative enrollment for each school year of the charter school's term. For purposes of this chapter, cumulative enrollment is defined as the total number of pupils, disaggregated by race, ethnicity, and pupil subgroups, who enrolled in school at any time during the school year.

(B) For each school year of the charter school's term, the percentage of pupils enrolled at any point between the beginning of the school year and census day who were not enrolled at the conclusion of that year, and the average results on the statewide assessments in the California Assessment of Student Performance and Progress system, or any successor system, for any such pupils who were enrolled in the charter school the prior school year.

(C) For each school year of the charter school's term, the percentage of pupils enrolled the prior school year who were not enrolled as of census day for the school year, except for pupils who completed the grade that is the highest grade served by the charter school, and the average results on the statewide assessments in the California Assessment of Student Performance and Progress system, or any successor system, for any such pupils.

(2) When determining whether to grant a charter renewal, the chartering authority shall review data provided pursuant to paragraph (1), any data that may be provided to chartering authorities by the department, and any substantiated complaints that the charter school has not complied with subparagraph (J) of paragraph (5) of subdivision (c) of Section 47605 or with subparagraph (J) of paragraph (5) of subdivision (b) of Section 47605.6.

(3) As part of its determination of whether to grant a charter renewal based on the criterion

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(continued)

established pursuant to subdivision (c) and subdivisions (a) and (b) of Section 47607.2, the chartering authority may make a finding that the charter school is not serving all pupils who wish to attend and, upon making such a finding, specifically identify the evidence supporting the finding.

(e) Notwithstanding subdivision (c) and subdivisions (a) and (b) of Section 47607.2, the chartering authority may deny renewal of a charter school upon a finding that the school is demonstrably unlikely to successfully implement the program set forth in the petition due to substantial fiscal or governance factors, or is not serving all pupils who wish to attend, as documented pursuant to subdivision (d). The chartering authority may deny renewal of a charter school under this subdivision only after it has provided at least 30 days' notice to the charter school of the alleged violation and provided the charter school with a reasonable opportunity to cure the violation, including a corrective action plan proposed by the charter school. The chartering authority may deny renewal only by making either of the following findings:

(1) The corrective action proposed by the charter school has been unsuccessful.

(2) The violations are sufficiently severe and pervasive as to render a corrective action plan unviable.

(f) A charter may be revoked by the chartering authority if the chartering authority finds, through a showing of substantial evidence, that the charter school did any of the following:

(1) Committed a material violation of any of the conditions, standards, or procedures set forth in the charter.

(2) Failed to meet or pursue any of the pupil outcomes identified in the charter.

(3) Failed to meet generally accepted accounting principles, or engaged in fiscal mismanagement.

(4) Violated any law.

(g) Before revocation, the chartering authority shall notify the charter school of any violation of this section and give the school a reasonable opportunity to remedy the violation, unless the chartering authority determines, in writing, that the violation constitutes a severe and imminent threat to the health or safety of the pupils.

(h) Before revoking a charter for failure to remedy a violation pursuant to subdivision (f), and after expiration of the school's reasonable opportunity to remedy without successfully remedying the violation, the chartering authority shall provide a written notice of intent to revoke and notice of facts in support of revocation to the charter school. No later than 30 days after providing the notice of intent to revoke a charter, the chartering authority shall hold a public hearing, in the normal course of business, on the issue of whether evidence exists to revoke the charter. No later than 30 days after the public hearing, the chartering authority shall issue a final decision to revoke or decline to revoke the charter, unless the chartering authority and the charter school agree to extend the issuance of the decision by an additional 30 days. The chartering authority shall not revoke a charter, unless it makes written factual findings supported by substantial evidence, specific to the charter school, that support its findings.

(i) (1) If a school district is the chartering authority and it revokes a charter pursuant to this section, the charter school may appeal the revocation to the county board of education within 30 days following the final decision of the chartering authority.

(2) The county board of education may reverse the revocation decision if the county board of education determines that the findings made by the chartering authority under subdivision (h) are not supported by substantial evidence. The school district may appeal the reversal to the state board.

(3) If the county board of education does not issue a decision on the appeal within 90 days of receipt, or the county board of education upholds the revocation, the charter school may appeal the revocation to the state board.

(4) The state board may reverse the revocation decision if the state board determines that the findings made by the chartering authority under subdivision (h) are not supported by substantial evidence. The state board may uphold the revocation decision of the school district if the state board determines that the findings made by the chartering authority under subdivision (h) are supported by substantial evidence.

(j) (1) If a county board of education is the chartering authority and the county board of education revokes a charter pursuant to this section, the charter school may appeal the revocation to the state board within 30 days following the decision of the chartering authority.

(2) The state board may reverse the revocation decision if the state board determines that the findings made by the chartering authority under subdivision (h) are not supported by substantial evidence.

(k) If the revocation decision of the chartering authority is reversed on appeal, the agency that granted the charter shall continue to be regarded as the chartering authority.

(l) During the pendency of an appeal filed under this section, a charter school whose revocation proceedings are based on paragraph (1) or (2) of subdivision (f) shall continue to qualify as a charter school for funding and for all other purposes of this part, and may continue to hold all existing grants, resources, and facilities, in order to ensure that the education of pupils enrolled in the school is not disrupted.

(m) Immediately following the decision of a county board of education to reverse a decision of a school district to revoke a charter, all of the following shall apply:

Demonstrably unlikely to implement the program successfully due to fiscal and governance factors or not serving all students desiring to attend

Notice of violation and opportunity to cure action

Denial of renewal; fundings

Revocation;
substantial evidence standard

Notice of potential revocation;
opportunity to remedy violation

Written notice of
intent to revoke; timelines

Public hearing

Written findings

Appeal of revocation

Revocation by county; appeal right

Funding during appeal process

Funding upon county approval

Section 47607

**Charter term;
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Report revocation to chartering authority, county, and state
No SBE waiver

- (1) The charter school shall qualify as a charter school for funding and for all other purposes of this part.
- (2) The charter school may continue to hold all existing grants, resources, and facilities.
- (3) Any funding, grants, resources, and facilities that had been withheld from the charter school, or that the charter school had otherwise been deprived of use, as a result of the revocation of the charter, shall be immediately reinstated or returned.
- (n) A final decision of a revocation or appeal of a revocation pursuant to subdivision (f) shall be reported to the chartering authority, the county board of education, and the department.
- (o) The requirements of this section shall not be waived by the state board pursuant to Section 33050 or any other law.

**Section 47607.2
Charter renewal; revocation**

Low Track

- (a) (1) The chartering authority shall not renew a charter if either of the following apply for two consecutive years immediately preceding the renewal decision:
 - (A) The charter school has received the two lowest performance levels schoolwide on all the state indicators included in the evaluation rubrics adopted pursuant to Section 52064.5 for which it receives performance levels.
 - (B) For all measurements of academic performance, the charter school has received performance levels schoolwide that are the same or lower than the state average and, for a majority of subgroups performing statewide below the state average in each respective year, received performance levels that are lower than the state average.

Limitations on application

- (2) Notwithstanding paragraph (1), if the two consecutive years immediately preceding the renewal decision include the 2019–20 or 2020–21 school year, the chartering authority shall not renew a charter if either of the following apply for two of the most recent years for which state data is available preceding the renewal decision:

Factors

- (A) The charter school has received the two lowest performance levels schoolwide on all the state indicators included in the evaluation rubrics adopted pursuant to Section 52064.5 for which it receives performance levels.
- (B) For all measurements of academic performance, the charter school has received performance levels schoolwide that are the same or lower than the state average and, for a majority of subgroups performing statewide below the state average in each respective year, received performance levels that are lower than the state average.

Written factual findings
Meaningful steps to address low performance; written plan

- (3) A charter school that meets the criteria established by this subdivision and paragraph (2) of subdivision (c) of Section 47607 shall only qualify for treatment under this subdivision.

Clear and convincing evidence
Measurable increase in academic achievement
Strong postsecondary outcomes

- (4) The chartering authority shall consider the following factors, and may renew a charter that meets the criteria in paragraph (1) or (2) only upon making both of the following written factual findings, specific to the particular petition, setting forth specific facts to support the findings:

Verified data

- (A) The charter school is taking meaningful steps to address the underlying cause or causes of low performance, and those steps are reflected, or will be reflected, in a written plan adopted by the governing body of the charter school.
- (B) There is clear and convincing evidence showing either of the following:

Renewal limited to two years

- (i) The school achieved measurable increases in academic achievement, as defined by at least one year's progress for each year in school.
- (ii) Strong postsecondary outcomes, as defined by college enrollment, persistence, and completion rates equal to similar peers.

Middle Track

- (C) Clauses (i) and (ii) of subparagraph (B) shall be demonstrated by verified data, as defined in subdivision (c).

Greater weight to academic performance
Clear and convincing evidence

- (5) Verified data, as defined in subdivision (c), shall be considered by the chartering authority until June 30, 2025, for a charter school pursuant to this subdivision, operating on or before June 30, 2020, only for the charter school's next two subsequent renewals.

Measurable increase in academic achievement
Strong postsecondary outcomes

- (6) For a charter renewed pursuant to this subdivision, the chartering authority may grant a renewal for a period of two years.

- (b) (1) For all charter schools for which paragraph (2) of subdivision (c) of Section 47607 and subdivision (a) of this section do not apply, the chartering authority shall consider the schoolwide performance and performance of all subgroups of pupils served by the charter school on the state indicators included in the evaluation rubrics adopted pursuant to Section 52064.5 and the performance of the charter school on the local indicators included in the evaluation rubrics adopted pursuant to Section 52064.5.

- (2) The chartering authority shall provide greater weight to performance on measurements of academic performance in determining whether to grant a charter renewal.

- (3) In addition to the state and local indicators, the chartering authority shall consider clear and convincing evidence showing either of the following:

- (A) The school achieved measurable increases in academic achievement, as defined by at least one year's progress for each year in school.
- (B) Strong postsecondary outcomes, as defined by college enrollment, persistence, and completion rates equal to similar peers.

- (4) Subparagraphs (A) and (B) of paragraph (3) shall be demonstrated by verified data, as defined in subdivision (c).

**Section 47607.2
Charter renewal; revocation**

(continued)
Verified data

(5) Verified data, as defined in subdivision (c), shall be considered by the chartering authority for the next two subsequent renewals until January 1, 2026, for a charter school pursuant to this paragraph.

Written findings

(6) The chartering authority may deny a charter renewal pursuant to this subdivision only upon making written findings, setting forth specific facts to support the findings, that the charter school has failed to meet or make sufficient progress toward meeting standards that provide a benefit to the pupils of the school, that closure of the charter school is in the best interest of pupils and, if applicable pursuant to paragraphs (2) and (3), that its decision provided greater weight to performance on measurements of academic performance.

Renewal limited to five years

(7) For a charter renewed pursuant to this subdivision, the chartering authority shall grant a renewal for a period of five years.

(c) (1) For purposes of this section, "verified data" means data derived from nationally recognized, valid, peer-reviewed, and reliable sources that are externally produced. Verified data shall include measures of postsecondary outcomes.

Data sources; limitations

(2) By January 1, 2021, the state board shall establish criteria to define verified data and identify an approved list of valid and reliable assessments that shall be used for this purpose.

(3) No data sources other than those adopted by the state board pursuant to paragraph (2) shall be used as verified data.

(4) Notwithstanding paragraph (3), a charter school under consideration for renewal before the state board's adoption pursuant to paragraph (2) may present data consistent with this subdivision.

(5) Adoption of the criteria pursuant to this subdivision shall not be subject to the requirements of the Administrative Procedure Act (Chapter 3.5 (commencing with Section 11340) of Part 1 of Division 3 of Title 2 of the Government Code).

(6) The state board may adopt and make necessary revisions to the criteria in accordance with the requirements of the Bagley-Keene Open Meeting Act (Article 9 (commencing with Section 11120) of Chapter 1 of Part 1 of Division 3 of Title 2 of the Government Code).

(7) Upon adoption of a pupil-level academic growth measure for English language arts and mathematics, the state board may reconsider criteria adopted pursuant to this subdivision.

(d) This section shall remain in effect only until January 1, 2026, and as of that date is repealed.

**Section 47607.3
Failure to improve pupil outcomes**
Declaration of public employer

Technical assistance

(a) Using an evaluation rubric adopted by the state board pursuant to Section 52064.5, and beginning with the 2020-21 school year, for any charter school for which one or more pupil subgroups identified pursuant to Section 52052 meet the criteria established pursuant to subdivision (g) of Section 52064.5 in two or more years, the county superintendent of schools in which the charter school is located shall provide technical assistance focused on building the charter school's capacity to develop and implement actions and services responsive to pupil and community needs, including, but not limited to, any of the following:

Identifying strengths and weaknesses; state priorities

(1) Assisting the charter school to identify its strengths and weaknesses in regard to the state priorities applicable to the charter school pursuant to subdivision (c) of Section 47605. This shall include working collaboratively with the charter school to review performance data on the state and local indicators included in the California School Dashboard authorized by subdivision (f) of Section 52064.5 and other relevant local data, and to identify effective, evidence-based programs or practices that address any areas of weakness.

Securing assistance to improve performance

(2) Working collaboratively with the charter school to secure assistance from an academic, programmatic, or fiscal expert or team of experts to identify and implement effective programs and practices that are designed to improve performance in any areas of weakness identified by the charter school. The county superintendent of schools in which the charter school is located, in consultation with the charter school, may solicit another service provider, which may include, but is not limited to, a school district, county office of education, or charter school, to act as a partner to the charter school in need of technical assistance.

Documentation demonstrating completion of activities

(3) Obtaining from the charter school timely documentation demonstrating that it has completed the activities described in paragraphs (1) and (2), or substantially similar activities, or has selected another service provider to work with the charter school to complete the activities described in paragraphs (1) and (2), or substantially similar activities, and ongoing communication with the chartering authority to assess the charter school's progress in improving pupil outcomes.

(b) For purposes of this section, the geographic lead agency, as identified pursuant to Section 52073, or its designee, as identified in subdivision (d) of Section 52071, shall serve in the role of the county superintendent of schools for a charter school authorized by the county board of education.

Requesting assistance

(c) If the charter school meets the criteria established for school districts under paragraph (1) of subdivision (b) of Section 52072, the county superintendent of schools in the county which the charter school is located may request assistance from the California Collaborative for Educational Excellence. The California Collaborative for Educational Excellence may, after consulting with the Superintendent, and with the approval of the state board, provide advice and assistance to the charter school pursuant to Section 52074.

Consider revocation

(d) A chartering authority shall consider for revocation any charter school to which the California

Section 47607.3

Failure to improve pupil outcomes

(continued)

Findings

Inability/failure to implement

Inadequate performance

Increases in academic achievement

Due process; no appeal

Technical assistance

Alternate methods for calculating state and local indicators

Time limit on application of section

No SBE waiver

Collaborative for Educational Excellence has provided advice and assistance pursuant to subdivision (c) and about which it has made either of the following findings, which shall be submitted to the chartering authority:

(1) That the charter school has failed, or is unable, to implement the recommendations of the California Collaborative for Educational Excellence.

(2) That the inadequate performance of the charter school, based upon an evaluation rubric adopted pursuant to Section 52064.5, is either so persistent or so acute as to require revocation of the charter.

(e) The chartering authority shall consider increases in pupil academic achievement for all pupil subgroups served by the charter school in determining whether to revoke the charter.

(f) A chartering authority shall comply with the hearing process described in subdivisions (g) and (h) of Section 47607 in revoking a charter. A charter school may not appeal a revocation of a charter made pursuant to this section.

(g) If the governing body of a charter school requests technical assistance, the chartering authority shall provide technical assistance consistent with paragraph (1) or (2) of subdivision (a). If a charter school has not been identified for technical assistance pursuant to subdivision (a), the chartering authority may assess the charter school a fee not to exceed the cost of the service.

(h) A charter school shall accept the technical assistance provided pursuant to subdivision (a). For purposes of accepting technical assistance, a charter school may satisfy this requirement by providing the timely documentation to the county superintendent of schools of the county in which the charter school is located, and maintaining regular communication with the chartering authority.

(i) For a charter school that is eligible for alternate methods for calculating the state and local indicators pursuant to subdivision (d) of Section 52064.5, technical assistance provided pursuant to subdivision (a) shall take into account the charter school's performance on alternative metrics applicable to the charter school based on the pupil population served.

(j) This section shall not preclude a charter school from soliciting technical assistance from other entities at its own expense.

(k) For a charter school operating before July 1, 2020, subdivision (a) as it read on January 1, 2019, shall apply until June 30, 2022.

(l) The requirements of this section shall not be waived by the state board pursuant to Section 33050 or any other law.

Section 47607.4

Term extension

Notwithstanding the renewal process and criteria established in Sections 47605.9, 47607, and 47607.2 or any other law, effective July 1, 2021, all charter schools whose term expires on or between January 1, 2022, and June 30, 2025, inclusive, shall have their term extended by two years, and all charter schools whose term expires on or between January 1, 2024, and June 30, 2027, inclusive, shall have their term extended by one additional year.

Section 47607.5

Nonrenewal appeals

No SBE waiver

(a) Except for charter schools authorized pursuant to Section 47605.6, if either a school district governing board or a county board of education, as a chartering authority, does not grant a renewal to a charter school pursuant to Section 47607 or 47607.2, the charter school may appeal the decision pursuant to the procedures pertaining to a denial of a petition for establishment of a charter school, as provided in subdivision (k) of Section 47605 for review in accordance with Section 47607.

(b) The requirements of this section shall not be waived by the state board pursuant to Section 33050 or any other law.

Section 47607.8

Collection of data to track implementation of changes of law

The department, in consultation with the state board, shall collect data to track implementation of Chapter 486 of the Statutes of 2019 (Assembly Bill 1505 of the 2019-20 Regular Session).

Section 47608

Authorizer compliance with Brown Act

All meetings of the governing board of the school district and the county board of education at which the granting, revocation, appeal, or renewal of a charter petition is discussed shall comply with the Ralph M. Brown Act (Chapter 9 (commencing with Section 54950) of Division 2 of Title 5 of the Government Code).

CHARTER SCHOOL MEGAWAIVER

Education Code

Section 47610

Megawaiver; exceptions

Exemption from school district laws

Compliance with building codes

A charter school shall comply with this part and all of the provisions set forth in its charter, but is otherwise exempt from the laws governing school districts, except all of the following:

(a) As specified in Section 47611.

(b) As specified in Section 41365.

(c) All laws establishing minimum age for public school attendance.

(d) The California Building Standards Code (Part 2 (commencing with Section 101) of Title 24 of the California Code of Regulations), as adopted and enforced by the local building enforcement agency with jurisdiction over the area in which the charter school is located.

(e) Charter school facilities shall comply with subdivision (d) by January 1, 2007.

A charter school facility is exempt from the requirements of subdivision (d) of Section 47610 if either of the following conditions apply:

(a) The charter school facility complies with Article 3 (commencing with Section 17280) and Article 6 (commencing with Section 17365) of Chapter 3 of Part 10.5.

(b) The charter school facility is exclusively owned or controlled by an entity that is not subject to the California Building Standards Code, including, but not limited to, the federal government.

Section 47610.5
Building code exemptions
Field Act

Federal facilities

CHARTER SCHOOL PUBLIC EMPLOYER
Education Code

(a) If a charter school chooses to make the State Teacher's Retirement Plan available, all employees of the charter school who perform creditable service shall be entitled to have that service covered under the plan's Defined Benefit Program or Cash Balance Benefit Program, and all provisions of Part 13 (commencing with Section 22000) and Part 14 (commencing with Section 26000) shall apply in the same manner as the provisions apply to other public schools in the school district that granted the charter.

(b) (1) If a charter school offers its employees coverage by the State Teachers' Retirement System or the Public Employees' Retirement System, or both, the charter school shall inform all applicants for positions within that charter school of the retirement system options for employees of the charter school.

(2) The information shall specifically include whether the charter school makes available to employees coverage under the State Teachers' Retirement System, the Public Employees' Retirement System, or both systems, and that accepting employment in the charter school may exclude the applicant from further coverage in the applicant's current retirement system, depending on the retirement options offered by the charter of the charter school.

(a) At the request of a charter school, a school district or county office of education that is the chartering authority of a charter school shall create any reports required by the State Teachers' Retirement System and the Public Employees' Retirement System. The county superintendent of schools, employing agency, or school district that reports to those systems pursuant to Section 23004 of this code or Section 20221 of the Government Code shall submit the required reports on behalf of the charter school. The school district or county office of education may charge the charter school for the actual costs of the reporting services.

(b) As a condition of creating and submitting reports for the State Teachers' Retirement System and the Public Employees Retirement System, the school district or county office of education shall not require a charter school to purchase payroll processing services from the chartering authority. Information submitted on behalf of the charter school to the State Teachers' Retirement System, the Public Employees' Retirement System, or both, shall be in a format conforming to the requirements of those systems.

Section 47611
STRS available

PERS available

(a) Chapter 10.7 (commencing with Section 3540) of Division 4 of Title 1 of the Government Code shall apply to charter schools.

(b) A charter school charter shall contain a declaration regarding whether or not the charter school shall be deemed the exclusive public school employer of the employees at the charter school for the purposes of Section 3540.1 of the Government Code. If the charter school is not so deemed a public school employer, the school district where the charter is located shall be deemed the public school employer for the purposes of Chapter 10.7 (commencing with Section 3540) of Division 4 of the Government Code.

(c) If the charter of a charter school does not specify that it shall comply with those statutes and regulations governing public school employers that establish and regulate tenure or a merit or civil service system, the scope of representation for that charter school shall also include discipline and dismissal of charter school employees.

(d) The Public Employment Relations Board shall take into account the Charter Schools Act of 1992 (Part 26.8 (commencing with Section 47600)) when deciding cases brought before it related to charter schools.

(e) The approval or a denial of a charter petition by a granting agency pursuant to subdivision (c) of Section 47605 shall not be controlled by collective bargaining agreements nor subject to review or regulation by the Public Employment Relations Board.

(f) By March 31, 2000, all existing charter schools must declare whether or not they shall be deemed a public school employer in accordance with subdivision (b), and that declaration shall not be materially inconsistent with the charter.

Section 47611.5
Exclusive public employer
Declaration of public employer

PERB

Approval of petition not controlled by collective bargaining agreements or PERB

(a) A charter school shall be deemed to be under the exclusive control of the officers of the public schools for purposes of Section 8 of Article IX of the California Constitution, with regard to the appropriation of public moneys to be apportioned to any charter school, including, but not necessarily limited to, appropriations made for purposes of this chapter.

(b) The average daily attendance in a charter school may not, in any event, be generated by a pupil who is not a California resident. To remain eligible for generating charter school apportionments, a pupil over 19 years of age shall be continuously enrolled in public school and make satisfactory

Section 47612
Charter school under control of public school officers

No ADA for non-California residents or pupils over age 19

Section 47612
Charter school under
control of public school officers
(continued)
Charter school deemed
district for funding purposes

Limit of one day of ADA per pupil

progress towards award of a high school diploma. The state board shall, on or before January 1, 2000, adopt regulations defining "satisfactory progress."

(c) A charter school shall be deemed to be a "school district" for purposes of Article 1 (commencing with Section 14000) of Chapter 1 of Part 9 of Division 1 of Title 1, Section 41301, Section 41302.5, Article 10 (commencing with Section 41850) of Chapter 5 of Part 24 of Division 3, Section 47638, and Sections 8 and 8.5 of Article XVI of the California Constitution.

(d) For purposes of calculating average daily attendance, no pupil shall generate more than one day of attendance in a calendar day. Notwithstanding any other law, a charter school that operates a multitrack calendar shall comply with all of the following:

(1) Calculate attendance separately for each track. The divisor in the calculation shall be the calendar days in which school was taught for pupils in each track.

(2) Operate no more than five tracks.

(3) Operate each track for a minimum of 175 days. If the charter school is a conversion school, the charter school may continue its previous schedule as long as it provides no fewer than 163 days of instruction in each track.

(4) For each track, provide the total number of instructional minutes, as specified in Section 47612.5.

(5) No track shall have less than 55 percent of its schooldays before April 15.

(6) Unless otherwise authorized by statute, no pupil shall generate more than one unit of average daily attendance in a fiscal year.

(e) Compliance with the conditions set forth in this section shall be included in the audits conducted pursuant to Section 41020.

CHARTER SCHOOL APPORTIONMENT
Education Code

Section 47612.1
Exemption from
satisfactory progress

(a) Except for the requirement that a pupil be a California resident, subdivision (b) of Section 47612 shall not apply to a charter school program that provides instruction exclusively in partnership with any of the following:

(1) The federal Workforce Innovation and Opportunity Act (29 U.S.C. Sec. 3101 et seq.).

(2) Federally affiliated Youth Build programs.

(3) Federal job corps training or instruction provided pursuant to a memorandum of understanding with the federal provider.

(4) The California Conservation Corps or local conservation corps certified by the California Conservation Corps pursuant to Section 14406 or 14507.5 of the Public Resources Code.

(b) This section shall become operative on July 1, 2015.

Section 47612.5
Apportionment conditions
Instructional minutes

(a) Notwithstanding any other law and as a condition of apportionment, a charter school shall do all of the following:

(1) For each fiscal year, offer, at a minimum, the following number of minutes of instruction:

(A) To pupils in kindergarten, 36,000 minutes.

(B) To pupils in grades 1 to 3, inclusive, 50,400 minutes.

(C) To pupils in grades 4 to 8, inclusive, 54,000 minutes.

(D) To pupils in grades 9 to 12, inclusive, 64,800 minutes.

Pupil attendance records

(2) Maintain written contemporaneous records that document all pupil attendance and make these records available for audit and inspection.

Certification of state testing

(3) Certify that its pupils have participated in the state testing programs specified in Chapter 5 (commencing with Section 60600) of Part 33 in the same manner as other pupils attending public schools as a condition of apportionment of state funding.

Independent study

(b) Notwithstanding any other law and except to the extent inconsistent with this section and Section 47634.2, a charter school that provides independent study shall comply with Article 5.5 (commencing with Section 51745) of Chapter 5 of Part 28 and implementing regulations adopted thereunder. The state board shall adopt regulations that apply this article to charter schools. To the extent that these regulations concern the qualifications of instructional personnel, the state board shall be guided by subdivision (l) of Section 47605.

Independent study reduction

(c) A reduction in apportionment made pursuant to subdivision (a) shall be proportional to the magnitude of the exception that causes the reduction. For purposes of paragraph (1) of subdivision (a), for each charter school that fails to offer pupils the minimum number of minutes of instruction specified in that paragraph, the Superintendent shall withhold from the charter school's apportionment for average daily attendance of the affected pupils, by grade level, the sum of that apportionment multiplied by the percentage of the minimum number of minutes of instruction at each grade level that the charter school failed to offer.

Nonclassroom-based
funding determination

(d) (1) Notwithstanding any other law and except as provided in paragraph (1) of subdivision (e), a charter school that has an approved charter may receive funding for nonclassroom-based instruction only if a determination for funding is made pursuant to Section 47634.2 by the state board. The determination for funding shall be subject to any conditions or limitations the state

Section 47612.5
Apportionment conditions
(continued)

board may prescribe. The state board shall adopt regulations on or before February 1, 2002, that define and establish general rules governing nonclassroom based instruction that apply to all charter schools and to the process for determining funding of nonclassroom-based instruction by charter schools offering nonclassroom-based instruction other than the nonclassroom-based instruction allowed by paragraph (1) of subdivision (e). Nonclassroom-based instruction includes, but is not limited to, independent study, home study, work study, and distance and computer-based education. In prescribing any conditions or limitations relating to the qualifications of instructional personnel, the state board shall be guided by subdivision (l) of Section 47605.

(2) Except as provided in paragraph (2) of subdivision (b) of Section 47634.2, a charter school that receives a determination pursuant to subdivision (b) of Section 47634.2 is not required to reapply annually for a funding determination of its nonclassroom-based instruction program if an update of the information the state board reviewed when initially determining funding would not require material revision, as that term is defined in regulations adopted by the board. A charter school that has achieved a rank of 6 or greater on the Academic Performance Index for the two years immediately before receiving a funding determination pursuant to subdivision (b) of Section 47634.2 shall receive a five-year determination and is not required to annually reapply for a funding determination of its nonclassroom-based instruction program if an update of the information the state board reviewed when initially determining funding would not require material revision, as that term is defined in regulations adopted by the state board. Notwithstanding any law, the state board may require a charter school to provide updated information at any time it determines that a review of that information is necessary. The state board may terminate a determination for funding if updated or additional information requested by the board is not made available to the board by the charter school within a reasonable amount of time or if the information otherwise supports termination. A determination for funding pursuant to Section 47634.2 shall not exceed five years.

(3) A charter school that offers nonclassroom-based instruction in excess of the amount authorized by paragraph (1) of subdivision (e) is subject to the determination for funding requirement of Section 47634.2 to receive funding each time its charter is renewed or materially revised pursuant to Section 47607. A charter school that materially revises its charter to offer nonclassroom-based instruction in excess of the amount authorized by paragraph (1) of subdivision (e) is subject to the determination for funding requirement of Section 47634.2.

(e) (1) Notwithstanding any other law, and as a condition of apportionment, "classroom-based instruction" in a charter school, for purposes of this part, occurs only when charter school pupils are engaged in educational activities required of those pupils and are under the immediate supervision and control of an employee of the charter school who possesses a valid certification document registered as required by law. For purposes of calculating average daily attendance for classroom-based instruction apportionments, at least 80 percent of the instructional time offered by the charter school shall be at the schoolsite, and the charter school shall require the attendance of all pupils for whom a classroom-based apportionment is claimed at the schoolsite for at least 80 percent of the minimum instructional time required to be offered pursuant to paragraph (1) of subdivision (a).

(2) For the purposes of this part, "nonclassroom instruction" or "nonclassroom-based instruction" means instruction that does not meet the requirements specified in paragraph (1). The state board may adopt regulations pursuant to paragraph (1) of subdivision (d) specifying other conditions or limitations on what constitutes nonclassroom based instruction, as it deems appropriate and consistent with this part.

(3) For purposes of this part, a schoolsite is a facility that is used principally for classroom instruction.

(4) Notwithstanding any other law, neither the state board nor the Superintendent may waive the requirements of paragraph (1) of subdivision (a).

(a) The State Board of Education may waive fiscal penalties calculated pursuant to subdivision (c) of Section 47612.5 for a charter school that fails to offer the minimum number of instructional minutes required pursuant to subdivision (a) of Section 47612.5 for the fiscal year.

(b) For fiscal penalties incurred as a result of providing insufficient instructional minutes in the 2002-03 fiscal year, or any fiscal year thereafter, the State Board of Education may grant a waiver only upon the condition that the charter school agrees to maintain minutes of instruction equal to those minutes of instruction it failed to offer and the minimum number of instructional minutes required pursuant to subdivision (a) of Section 47612.5 for twice the number of years that it failed to maintain the required minimum number of instructional minutes for the fiscal year. Compliance with the condition shall commence no later than the school year following the fiscal year that the waiver was granted and shall continue for each subsequent school year until the condition is satisfied.

(c) Compliance with the condition set forth in subdivision (b) shall be verified in the report of the annual audit of the charter school for each fiscal year in which it is required to maintain additional time pursuant to subdivision (b). If the audit report for a year in which the additional time is required to be maintained does not verify that the additional time was provided, the waiver granted pursuant to subdivision (b) shall be revoked and the charter school shall repay

Revisions of funding determination

Threshold for funding determination

Classroom-based instruction

Nonclassroom-based instruction

Section 47612.6
SBE instructional minutes waiver

Section 47612.6
SBE instructional minutes waiver
(continued)

the fiscal penalty calculated pursuant to subdivision (c) of Section 47612.5, in accordance with subdivision (a) of Section 41344.

(d) It is the intent of the Legislature that charter schools make every effort to make up any instructional minutes lost during the fiscal year in which the loss occurred rather than seek a waiver pursuant to this section.

Section 47612.7
Moratorium on establishment of nonclassroom-based charters
Limitations

(a) Notwithstanding any other law and except as provided in subdivision (b), from January 1, 2020, to January 1, 2026, inclusive, the approval of a petition for the establishment of a new charter school, as defined in paragraph (2) of subdivision (e) of Section 47612.5, is prohibited.

(b) Subdivision (a) shall not apply to a nonclassroom-based charter school that was granted approval of its petition and providing educational services to pupils before October 1, 2019, under either of the following circumstances:

(1) If Assembly Bill 1507 of the 2019-20 Regular Session amends Section 47605.1 and becomes operative on January 1, 2020, and the charter school is required to submit a petition to the governing board of a school district or county board of education in an adjacent county in which its existing resource center is located in order to comply with Section 47605.1, as amended by Assembly Bill 1507 of the 2019-20 Regular Session, or to retain current program offerings or enrollment.

(2) If a charter school is required to submit a petition to a school district or county board of education in which a resource center is located in order to comply with the court decision in Anderson Union High School District v. Shasta Secondary Home School (2016) 4 Cal.App.5th 262, or other relevant court ruling, and the petition is necessary to retain current program offerings or enrollment.

(3) A charter school authorized by a different chartering authority pursuant to paragraphs (1) and (2) shall be regarded by the department as a continuing charter school for all purposes to the extent it does not conflict with federal law. In order to prevent any potential conflict with federal law, this paragraph does not apply to covered programs as identified in Section 8101(11) of the federal Elementary and Secondary Education Act of 1965 (20 U.S.C. Sec. 7801) to the extent the affected charter school is the restructured portion of a divided charter school pursuant to Section 47654.

No SBE waiver

(c) Notwithstanding Section 33050 or any other law, the state board shall not waive the restrictions described in this section.

(d) This section shall remain in effect only until January 1, 2027, and as of that date is repealed.

Section 47613
Supervisory oversight

1% or 3% fee

(a) Except as set forth in subdivision (b), a chartering authority may charge for the actual costs of supervisory oversight of a charter school not to exceed 1 percent of the revenue of the charter school.

(b) A chartering authority may charge for the actual costs of supervisory oversight of a charter school not to exceed 3 percent of the revenue of the charter school if the charter school is able to obtain substantially rent free facilities from the chartering authority.

(c) A local educational agency that is given the responsibility for supervisory oversight of a charter school, pursuant to paragraph (1) of subdivision (k) of Section 47605, may charge for the actual costs of supervisory oversight, and administrative costs necessary to secure charter school funding. A charter school that is charged for costs under this subdivision may not be charged pursuant to subdivision (a) or (b).

(d) This section does not prevent the charter school from separately purchasing administrative or other services from the chartering authority or any other source.

(e) For purposes of this section, "chartering authority" means a school district, county board of education, or the state board, that granted the charter to the charter school.

"Revenue of the charter school" defined

(f) For purposes of this section, "revenue of the charter school" means the amount received in the current fiscal year from the local control funding formula calculated pursuant to Section 42238.02, as implemented by Section 42238.03.

(g) For purposes of this section, "costs of supervisory oversight" include, but are not limited to, costs incurred pursuant to Section 47607.3.

Section 47613.1
Apportionments for converted districts

ADA equal to base revenue limit

(a) The Superintendent shall make all of the following apportionments on behalf of a charter school in a school district in which all schools have been converted to charter schools pursuant to Section 47606:

(1) From funds appropriated to Section A of the State School Fund for apportionment for that fiscal year pursuant to Article 2 (commencing with Section 42238) of Chapter 7 of Part 24 of Division 3, an amount for each unit of current fiscal year regular average daily attendance in the charter school multiplied by the funding rates calculated pursuant to Section 42238.02, as implemented by Section 42238.03, except that average daily attendance generated by pupils who are residents of the school district may be funded pursuant to paragraph (1) of subdivision (a) of Section 42238.05.

(2) For each pupil enrolled in the charter school who is entitled to special education services, the state and federal funds for special education services for that pupil that would have been

Section 47613.1
Apportionments for
converted districts
(continued)

apportioned for that pupil to the school district to which the charter petition was submitted.

(3) Funds for the programs described in former clause (i) of subparagraph (B) of paragraph (1) of subdivision (a) of Section 54761, as that section read on June 30, 2005, and Sections 63000 and 64000, to the extent that any pupil enrolled in the charter school is eligible to participate.

(b) Transfers of funding in lieu of property taxes pursuant to Section 47635 shall not apply to a school district in which all schools have been converted to charter schools pursuant to Section 47606.

(c) For each pupil residing in the school district and receiving instruction provided by the county office of education, a school district in which all schools have been converted to charter schools shall, for purposes of Section 2576, be treated as a school district in which all schools have not been converted to charter schools.

(d) The provisions of subparagraph (A) of paragraph (2) of subdivision (f) of Section 42238.02 that cap the percentage of unduplicated pupils used for calculating the concentration grant add-on to the percentage of unduplicated pupils of the school district in which the charter school is physically located shall not apply to a school district described in this section.

(e) Consistent with Section 47630, necessary small school funding shall not be provided to a school district described in this section.

FREE OR REDUCED-PRICE MEALS
Education Code

(a) Notwithstanding any other provision of this chapter, commencing with the 2022–23 school year all of the following shall apply:

(1) (A) A school district, county superintendent of schools, or charter school maintaining kindergarten or any of grades 1 to 12, inclusive, shall make available a nutritionally adequate breakfast and a nutritionally adequate lunch free of charge and with adequate time to eat, as determined by that school district, county superintendent of schools, or charter school in consideration of the recommendations provided by the department pursuant to subdivision (e), during each schoolday to any pupil who requests a meal without consideration of the pupil's eligibility for a federally funded free or reduced-price meal, except as described in clauses (i) and (ii) of subparagraph (B), with a maximum of one free breakfast meal and one free lunch meal, except for family daycare homes that shall be reimbursed for 75 percent of the meals served. The meals made available under this paragraph shall be nutritionally adequate meals that qualify for federal reimbursement. Participating school districts, county superintendents of schools, and charter schools shall comply with federal regulations for the National School Lunch Program and School Breakfast Program, which includes established mealtimes.

(B) (i) The department shall submit a waiver request to the United States Department of Agriculture to allow for one meal provided during a schoolday lasting four hours or less to be served in a noncongregate manner.

(ii) If the department receives approval for the federal noncongregate waiver required by clause (i), school districts, county superintendents of schools, and charter schools may make available either a nutritionally adequate breakfast or a nutritionally adequate lunch in a noncongregate manner for meal service combinations resulting in either (I) a congregate nutritionally adequate breakfast and a noncongregate nutritionally adequate lunch or (II) a noncongregate nutritionally adequate breakfast and a congregate nutritionally adequate lunch. These meals shall be reimbursed under the provisions of paragraph (2) if both state and federal requirements are met.

(2) The department shall provide state meal reimbursement to school districts, county offices of education, and charter schools that participate in, and meet the requirements of, the federal School Breakfast Program and National School Lunch Program, and any applicable state laws and regulations. State meal reimbursement shall be provided for reduced-price and paid meals served to pupils, as described in subdivision (b).

(b) The amount of per-meal reimbursements provided under this section shall not exceed the difference between the sum of the amounts calculated from meals claimed based on the free combined breakfast and lunch reimbursement rates established by the United States Department of Agriculture and state meal contribution established in Section 49559, and the combined federal and state amounts reimbursed for reduced-price and paid meals claimed.

(c) The reimbursement required pursuant to this section shall be provided upon appropriation by the Legislature. This section shall not be operative until the Legislature has appropriated funds for purposes of this section.

(d) (1) The department may adopt, and as necessary revise, guidelines in accordance with this section at a publicly noticed meeting if the department complies with all of the following:

(A) Provides an opportunity for public comment at the meeting.

(B) Provides written public notice of a meeting at least 30 days before the meeting at which the guideline to be adopted will be considered or approved.

(C) For a substantive revision of the guidelines, the department provides written notice of a meeting at least 15 days before the meeting at which the revision will be considered or approved.

Section 49501.5
Two free meals upon request
without regard to eligibility

Section 49501.5

Two free meals upon request without regard to eligibility

(continued)

(2) The adoption or revision of guidelines pursuant to this subdivision is exempt from Chapter 3.5 (commencing with Section 11340) of Part 1 of Division 3 of Title 2 of the Government Code until July 1, 2023.

(e) The department shall review available evidence-based research, studies, and survey findings with school food authorities and school food workers, or their representatives, to make a recommendation for the amount of time that is adequate for a pupil to eat a school meal, including, but not limited to, the steps necessary to ensure that a pupil has adequate time to eat school meals that are served pursuant to this section and examining the role that breakfast in the classroom and other innovative breakfast models can play in supporting adequate time to eat. These recommendations shall be made public on the department's internet website on or before June 30, 2025.

(f) Notwithstanding subdivision (a), a school district, county office of education, or charter school that offers independent study, pursuant to Article 5.5 (commencing with Section 51744) of Chapter 5 of Part 28, shall meet the requirements of this section for any pupil on any schoolday that the pupil is scheduled for educational activities, as defined in Section 49010, lasting two or more hours, at a schoolsite, resource center, meeting space, or other satellite facility. Pupils who are present during established meal times shall have a nutritionally adequate breakfast and nutritionally adequate lunch made available.

(g) The chartering authority shall, upon request by a charter school and to the extent feasible within existing resources, provide technical assistance to the charter school in implementing this section.

(h) A charter school may enter into a partnership with an existing school food authority for the purposes of implementing this section.

(i) The chartering authority shall, upon request by a new charter school, contract with a charter school to make available a nutritionally adequate school breakfast and a nutritionally adequate school lunch until the charter school is an approved school food authority or until July 1 of the school year after the charter school becomes operational, whichever occurs first. The contract shall not exceed the actual costs to provide meals to the charter school, including, but not limited to, additional staffing costs and delivery of meals to the schoolsite, that are not covered by federal or state meal reimbursement.

(j) To comply with subdivision (a), a school district, county office of education, or charter school may use funds made available through any federal or state program the purpose of which includes the provision of meals to a pupil, including the federal School Breakfast Program, the federal National School Lunch Program, the federal Summer Food Service Program, the federal Seamless Summer Option, or the state meal program, or may do so at the expense of the school district, county office of education, or charter school.

(k) For purposes of this section, the following definitions apply:

(1) "Nutritionally adequate breakfast" is one that qualifies for reimbursement under the most current meal pattern for the federal School Breakfast Program, as defined in Section 220.8 of Title 7 of the Code of Federal Regulations.

(2) "Nutritionally adequate lunch" is one that qualifies for reimbursement under the most current meal pattern for the federal National School Lunch Program, as defined in Section 210.10 of Title 7 of the Code of Federal Regulations.

(3) "Schoolday" means any day that pupils in kindergarten or any of grades 1 to 12, inclusive, are present at a schoolsite or school facility for purposes of instruction or educational activities, as defined in Section 49010, including, but not limited to, pupil attendance at minimum days, state-funded preschool, transitional kindergarten, summer school including incoming kindergarten pupils, extended school year days, school-sponsored field trips, independent study when a pupil is onsite during the schoolday, and Saturday school sessions.

Section 49531

State reimbursement for meals

(a) A school district, county superintendent of schools, or charter school may apply to the department for all available federal and state funds that they are eligible for so that a nutritionally adequate breakfast and lunch may be made available to pupils each schoolday at each schoolsite or school facility where pupils are present during the schoolday and to children receiving child development services. A school district, county superintendent of schools, or charter school that receives state funds pursuant to this article shall make available breakfasts and lunches in accordance with state and federal guidelines. If an entity's school meal service is not in compliance with state and federal guidelines or regulations, or both, the entity shall be ineligible for state meal reimbursement.

(b) (1) A nutritionally adequate breakfast, for the purposes of this article, is one that qualifies for reimbursement under the most current meal pattern for the federal School Breakfast Program, as defined in Section 220.8 of Title 7 of the Code of Federal Regulations and paragraph (2). A nutritionally adequate lunch for purposes of this article is one that qualifies for reimbursement under the most current meal pattern for the federal National School Lunch Program, as defined in Section 210.10 of Title 7 of the Code of Federal Regulations and paragraph (2).

(2) A nutritionally adequate breakfast or lunch shall not consist of more added sugar than the

Section 49531
State reimbursement for meals
(continued)

amount allowed by the federal School Breakfast program and the federal National School Lunch Program, respectively.

(c) (1) If the federal School Breakfast Program and federal National School Lunch Program allow more added sugar or sodium than is recommended by the most recent Dietary Guidelines for Americans, established by the United States Department of Agriculture and the United States Department of Health and Human Services, the State Department of Education shall convene representatives from the California School Nutrition Association and cafeteria workers, or their representatives, to work in partnership to provide the following:

(A) Maximum daily added sugar intake recommendations for each grade level commensurate with the American Academy of Pediatrics' standards for children two years of age and older.

(B) Maximum daily added sodium intake recommendations for each grade level commensurate with recommendations for children and adolescents in the Dietary Guidelines for Americans.

(2) Recommendations pursuant to this subdivision shall encourage the prioritization of foods with higher nutritional density when there is added sugar or sodium in the food.

(d) State reimbursement for meals provided pursuant to this article shall be limited to meals made available to pupils pursuant to Section 49501.5.

(a) For purposes of this section, "local educational agency" means a school, school district, county office of education, or charter school.

(b) (1) A local educational agency shall ensure that a pupil is not denied an available reimbursable meal of the pupil's choice and is not shamed or treated differently from other pupils due to the pupil's eligibility for free or reduced-price meals. This paragraph does not prohibit a school from serving an alternative reimbursable meal to a pupil who may need one for dietary or religious reasons, or as a regular menu item.

(2) If a local educational agency is required to provide to the department or to the United States Department of Agriculture a copy of the meal charge policy required pursuant to memorandum SP 46-2016 issued by the United States Department of Agriculture, the local educational agency or governing board or body of the local educational agency, as applicable, shall make that policy public.

(c) School personnel and volunteers at a local educational agency that serves nutritionally adequate meals to pupils during the instructional day shall not allow any disciplinary action that is taken against a pupil to result in the denial or delay of a nutritionally adequate breakfast or a nutritionally adequate lunch, as defined in Section 49553, to that pupil.

(d) A local educational agency shall not take any action directed at a pupil to collect school meal fees.

(e) This section shall only apply to a local educational agency that provides school meals through the federal National School Lunch Program or the federal School Breakfast Program.

Section 49557.5
Meal charge policy and equity

KITCHEN INFRASTRUCTURE UPGRADES

Section 132 of AB 181 (Ch. 52, Statutes of 2022), as amended by Section 100 of SB 114 (Ch. 48, Statutes of 2023)

(a) The sum of six hundred million dollars (\$600,000,000) is hereby appropriated from the General Fund to the State Department of Education for allocation to local educational agencies to expend on kitchen infrastructure upgrades that will increase a school's capacity to prepare meals served through a federal school meal program, including for freshly prepared onsite meals, to serve fresh and nutritious school meals using minimally processed, locally grown, and sustainable food, or for expanding meal options for pupils with restricted diets. Funds allocated to eligible local educational agencies shall be encumbered no later than June 30, 2025.

(b) (1) Of the total amount appropriated under subdivision (a), each eligible local educational agency may receive a base allocation of one hundred thousand dollars (\$100,000).

(2) After allocations are made pursuant to paragraph (1), 50 percent of the remaining funds shall be allocated proportionally to local educational agencies based on the number of reimbursable meals served in October 2021 by the local educational agency.

(3) Allowable uses of funds allocated pursuant to paragraphs (1) and (2) to increase a school's capacity to prepare meals and improve the nutritional quality of food served through a federal school meal program and to reduce waste include all of the following:

(A) Cooking equipment, including, but not limited to, electrical support and facility upgrade requirements, combination ovens, dishwashers, steamers, or tilting skillets.

(B) Service equipment, including, but not limited to, service lines, point-of-sale systems, liquid beverage dispensers, reusable utensils, food trays, and cups, or mobile carts.

(C) Refrigeration and storage, including, but not limited to, system upgrades, walk-in refrigerators, freezers, or blast chillers.

(D) Transportation of ingredients, meals, and equipment between sites, including, but not limited to, vehicles and equipment to prevent spoilage of food in transit.

(E) Supporting infrastructure system needs for items described in subparagraphs (A) to (D), inclusive.

Section 132 of AB 181

(F) Training and professional development for local educational agency food service staff on expanding meal offerings, including, but not limited to, breakfast and supper, and promoting nutritious foods, which may include training on minimally processed, freshly prepared onsite meals, locally and sustainably grown foods, plant-based foods, restricted diet foods, food preparation, healthy food marketing, reducing food waste, and changing the school lunchroom environment.

(G) To provide additional compensation for additional work relating to serving universal school meals that may include minimally processed, locally and sustainably grown foods, a plant-based or restricted diet food option, or a plant-based milk option.

(4) When acquiring new cooking equipment pursuant to paragraph (3), local educational agencies receiving funds are encouraged, to the extent practicable, to acquire energy-saving electric and induction equipment rather than equipment that uses fossil fuels.

(5) (A) After allocations are made pursuant to paragraphs (1) to (3), inclusive, the remaining funds may be allocated to local educational agencies for planning and implementation of facility improvements and equipment upgrades to increase capacity for freshly prepared onsite meal preparation. Allowable uses for this funding shall include the allowable uses described in paragraph (3), as well as costs for planning and costs associated with implementing freshly prepared onsite preparation of reimbursable school meals, serving fresh and nutritious reimbursable school meals using California-grown food, or expanding reimbursable meal options for pupils with restricted diets.

(B) To be eligible for funding under this paragraph, a local educational agency shall attest that no less than 40 percent of reimbursable federal National School Lunch Program and federal School Breakfast Program meals, including the entree, prepared each week, beginning in the 2023–24 school year, shall be freshly prepared onsite meals.

(C) Allocation of funds pursuant to subparagraph (A) shall be proportionate based on the number of reimbursable meals served in October 2021 by the local educational agency.

(c) The State Department of Education shall coordinate with the Department of Food and Agriculture to identify ways by which funding for freshly prepared onsite reimbursable meals may complement local educational agency programs enabled by California Farm to School Incubator Grants.

(d) As a condition of receiving funding pursuant to subdivisions (a) and (b), each local educational agency shall report to the State Department of Education, on or before June 30, 2025, on how it used the funding to improve the quality of school meals, increased participation in subsidized school meal programs, and, if applicable, increased the capacity for freshly prepared onsite meals.

(e) For purposes of this section, the following definitions apply:

(1) "Federal school meal program" means the federal National School Lunch Program, the federal School Breakfast Program, the Seamless Summer Option, or the Summer Food Service Program.

(2) "Food service staff" means a person employed on a full-time or part-time basis as a classified school employee by a local educational agency.

(3) "Freshly prepared onsite meal" means food service in which the preparation of meals takes place on a daily basis at the site of consumption or in the local educational agency's central kitchen, using whole ingredients in their most basic, minimally processed form, or cooking or preparing both fresh, raw, whole ingredients and ready-made products. The State Department of Education, in the reasonable exercise of its discretion, may interpret this definition and provide guidance to local educational agencies to support the implementation of this section, consistent with the intent of this section.

(4) "Local educational agency" means a school district, county office of education, or charter school participating in the federal School Breakfast Program or the federal National School Lunch Program.

(5) "Nutritious" means, at a minimum, foods that align with the federal and state standards for meals served through the federal National School Lunch Program and the federal School Breakfast Program, and as further defined for purposes of Section 49531 of the Education Code.

(6) "Plant-based food option" means a food that contains no animal products or byproducts, including meat, poultry, fish, dairy, or eggs, and that is recognized by the United States Department of Agriculture as a meat alternate for purposes of the federal National School Lunch Program.

(7) "Restricted diet food option" means a food prepared in response to a pupil with at least one dietary restriction, including, but not limited to, religious dietary restrictions or restrictions prescribed by a physician.

(f) It is the intent of the Legislature that pupils be provided fresh and nutritious meals using minimally processed, locally grown, and sustainable food, and be provided meal options for those pupils with restricted diets.

(g) For purposes of making the computations required by Section 8 of Article XVI of the California Constitution, the appropriation made by subdivision (a) shall be deemed to be "General Fund revenues appropriated for school districts," as defined in subdivision (c) of Section 41202 of the Education Code, for the 2021–22 fiscal year, and included within the "total allocations to school districts and community college districts from General Fund proceeds of taxes appropriated pursuant to Article XIII B," as defined in subdivision (e) of Section 41202 of the Education Code, for the 2021–22 fiscal year.

SCHOOL FOOD BEST PRACTICES

Section 133 of AB 181 (Ch. 52, Statutes of 2022), as amended by Section 101 of SB 114 (Ch. 48, Statutes of 2023)

(a) (1) The sum of one hundred million dollars (\$100,000,000) is hereby appropriated from the General Fund to the State Department of Education for allocation, in consultation with the Department of Food and Agriculture, to local educational agencies to expend on implementing any of the following school food best practices as part of reimbursable meals served through the federal National School Lunch Program and federal School Breakfast Program:

(A) Procuring California-grown or produced, sustainably grown, or whole or minimally processed foods to support equity in the procurement practices of local educational agencies.

(B) Using California-grown, whole or minimally processed foods in plant-based or restricted diet meals for pupils.

(C) Procuring plant-based or restricted diet food options for use in meals for pupils.

(D) Freshly preparing meals onsite.

(2) Funds allocated to eligible local educational agencies shall be encumbered no later than June 30, 2025.

(3) Notwithstanding any other law, additional funding reallocated to this program pursuant to Provision 7 of Item 6100-203-0001 of Section 2.0 of the Budget Act of 2022 shall be available for the same uses and subject to the same conditions for encumbrance, allocation, and reporting as the funding provided in paragraph (1).

(b) (1) Of the total amount appropriated under subdivision (a), each eligible local educational agency may receive a base allocation of fifty thousand dollars (\$50,000).

(2) The department shall, to the extent possible, consolidate the application for these funds with the application for the kitchen infrastructure and training program provided for in Section 132 of Chapter 52 of the Statutes of 2022.

(3) (A) The State Department of Education, in consultation with the Department of Food and Agriculture, shall develop eligibility criteria for California-grown, or whole or minimally processed, sustainably grown food, and plant-based or restricted diet food options from California producers that may be minimally processed and can be purchased by local educational agencies with funds pursuant to this section.

(B) These criteria shall consider supporting local economies, environmental sustainability, animal welfare, and fair labor practices, and may be demonstrated through certifications or other recognitions as appropriate.

(C) The State Department of Education shall develop these criteria no later than January 1, 2023.

(4) (A) After allocations are made pursuant to paragraph (1), 50 percent of the remaining funds shall be allocated proportionately to local educational agencies based on the number of meals served in October 2021 by the local educational agency.

(B) After allocations are made pursuant to subparagraph (A), the remaining funds shall be allocated proportionately based on a local educational agency's total enrollment of pupils who are eligible for free or reduced-price meals.

(c) A local educational agency that receives funding under this section shall do both of the following:

(1) Certify that it will use the moneys for the costs incurred by the local educational agency for food products purchased on or after the date the local educational agency received notification from the State Department of Education of the amount to be distributed to the local educational agency, as provided by this section, in meals that are served as part of the United States Department of Agriculture's child nutrition programs.

(2) Satisfy the eligibility requirements developed pursuant to paragraph (3) of subdivision (b).

(d) For purposes of this section, the following definitions apply:

(1) "California-grown" means agricultural products that have been produced in the state, as specified in paragraph (1) of subdivision (a) of Section 43100 of the Food and Agricultural Code.

(2) "Freshly prepared onsite meal" means food service in which the preparation of meals takes place on a daily basis at the site of consumption or in the local educational agency's central kitchen, using whole ingredients in their most basic, minimally processed form, or cooking or processing with both fresh, raw, whole ingredients and ready-made products. The State Department of Education, in the reasonable exercise of its discretion, may interpret this definition and provide guidance to local educational agencies to support the implementation of this section, consistent with the intent of this section.

(3) "Local educational agency" means a school district, county office of education, or charter school participating in the federal School Breakfast Program or the federal National School Lunch Program.

(4) "Plant-based food option" means a food that contains no animal products or byproducts, including meat, poultry, fish, dairy, or eggs, and that is recognized by the United States Department of Agriculture as a meat alternate for purposes of the federal National School Lunch Program.

(5) "Restricted diet food option" means a food prepared in response to a pupil with at least one dietary restriction, including, but not limited to, religious dietary restrictions or restrictions prescribed by a physician.

Section 133 of AB 181

Section 133 of AB 181

(continued)

- (6) The State Department of Education, in consultation with the Department of Food and Agriculture, may define “whole or minimally processed” pursuant to subparagraph (A) of paragraph (3) of subdivision (b).
- (e) As a condition of receiving funding pursuant to subdivisions (a) and (b), each local educational agency shall report to the State Department of Education, with a final report due on or before June 30, 2025, on how it used the funding to increase California-grown or produced, sustainably grown, or whole or minimally processed foods in school meals, which could include plant-based and restricted diets, as well as ongoing plans for sustaining these procurement practices. The State Department of Education and the Department of Food and Agriculture shall collaborate on developing the reporting template. The State Department of Education shall share the summary of statewide reporting with the Department of Food and Agriculture and shall coordinate to document best practices and elements of a sustainable food procurement plan for school meals.
- (f) For purposes of making the computations required by Section 8 of Article XVI of the California Constitution, the appropriation made by subdivision (a) shall be deemed to be “General Fund revenues appropriated for school districts,” as defined in subdivision (c) of Section 41202 of the Education Code, for the 2021–22 fiscal year, and included within the “total allocations to school districts and community college districts from General Fund proceeds of taxes appropriated pursuant to Article XIII B,” as defined in subdivision (e) of Section 41202 of the Education Code, for the 2021–22 fiscal year.

**PROP 39 AND FACILITY GRANT PROGRAM
Education Code**

Section 47614
Public school facilities
Basic obligations of district

(a) The intent of the people in amending Section 47614 is that public school facilities should be shared fairly among all public school pupils, including those in charter schools.

(b) Each school district shall make available, to each charter school operating in the school district, facilities sufficient for the charter school to accommodate all of the charter school’s in-district students in conditions reasonably equivalent to those in which the students would be accommodated if they were attending other public schools of the district. Facilities provided shall be contiguous, furnished, and equipped, and shall remain the property of the school district. The school district shall make reasonable efforts to provide the charter school with facilities near to where the charter school wishes to locate, and shall not move the charter school unnecessarily.

Charge for facilities

(1) The school district may charge the charter school a pro rata share (based on the ratio of space allocated by the school district to the charter school divided by the total space of the district) of those school district facilities costs which the school district pays for with unrestricted general fund revenues. The charter school shall not be otherwise charged for use of the facilities. No school district shall be required to use unrestricted general fund revenues to rent, buy, or lease facilities for charter school students.

(2) Each year each charter school desiring facilities from a school district in which it is operating shall provide the school district with a reasonable projection of the charter school’s average daily classroom attendance by in-district students for the following year. The district shall allocate facilities to the charter school for that following year based upon this projection. If the charter school, during that following year, generates less average daily classroom attendance by in-district students than it projected, the charter school shall reimburse the district for the over-allocated space at rates to be set by the State Board of Education.

Schools operating in district

(3) Each school district’s responsibilities under this section shall take effect three years from the effective date of the measure which added this subparagraph, or if the school district passes a school bond measure prior to that time on the first day of July next following such passage.

(4) Facilities requests based upon projections of fewer than 80 units of average daily classroom attendance for the year may be denied by the school district.

(5) The term “operating,” as used in this section, shall mean either currently providing public education to in-district students, or having identified at least 80 in-district students who are meaningfully interested in enrolling in the charter school for the following year.

(6) The State Department of Education shall propose, and the State Board of Education may adopt, regulations implementing this subdivision, including but not limited to defining the terms “average daily classroom attendance,” “conditions reasonably equivalent,” “in-district students,” “facilities costs,” as well as defining the procedures and establishing timelines for the request for, reimbursement for, and provision of, facilities.

Section 47614.5
Charter School
Facility Grant Program (SB 740)

(a) The Charter School Facility Grant Program is hereby established, and shall be administered by the California School Finance Authority. The grant program is intended to provide assistance with facilities rent and lease costs for pupils in charter schools.

(b) (1) Commencing with the 2017-18 fiscal year, and subject to available funding in the annual Budget Act, eligible charter schools shall receive an amount equivalent to one of the following, whichever is less:

(A) Seventy-five percent of annual facilities rent and lease costs for the charter school.

**Section 47614.5
Charter School
Facility Grant Program (SB 740)**
(continued)

(B) For the 2017-18 fiscal year, an amount equal to one thousand one hundred seventeen dollars (\$1,117) per unit of average daily attendance, as certified at the second principal apportionment. Commencing with the 2018-19 fiscal year, the amount of funding provided per unit of average daily attendance in the preceding fiscal year, as adjusted by the percentage change in the annual average value of the Implicit Price Deflator for State and Local Government Purchases of Goods and Services for the United States, as published by the United States Department of Commerce for the 12-month period ending in the third quarter of the prior fiscal year. This percentage change shall be determined using the latest data available as of May 10 of the preceding fiscal year compared with the annual average value of the same deflator for the 12-month period ending in the third quarter of the second preceding fiscal year, using the latest data available as of May 10 of the preceding fiscal year, as reported by the Department of Finance.

(2) In any fiscal year, if the funds appropriated for purposes of this section by the annual Budget Act are insufficient to fully fund the approved amounts, the California School Finance Authority shall apportion the available funds on a pro rata basis.

(c) For purposes of this section, the California School Finance Authority shall do all of the following:

(1) Inform charter schools of the grant program.

(2) Upon application by a charter school, determine eligibility, based on the geographic location of the charter schoolsite, pupil eligibility for free or reduced-price meals, and a preference in admissions, as appropriate. Eligibility for funding shall not be limited to the grade level or levels served by the school whose attendance area is used to determine eligibility. A charter schoolsite is eligible for funding pursuant to this section if the charter schoolsite meets either of the following conditions:

(A) The charter schoolsite is physically located in the attendance area of a public elementary school in which 55 percent or more of the pupil enrollment is eligible for free or reduced-price meals and the charter schoolsite gives a preference in admissions to pupils who are currently enrolled in that public elementary school and to pupils who reside in the elementary school attendance area where the charter schoolsite is located.

(B) Fifty-five percent or more of the pupil enrollment at the charter schoolsite is eligible for free or reduced-price meals.

(3) Inform charter schools of their grant eligibility.

(4) Make apportionments to a charter school for eligible expenditures according to the following schedule:

(A) An initial apportionment by October 31 of each fiscal year, provided the charter school has submitted a timely application for funding, as determined by the California School Finance Authority. The initial apportionment shall be 50 percent of the charter school's estimated annual entitlement as determined by this section.

(B) A second apportionment by March 1 of each fiscal year. This apportionment shall be 75 percent of the charter school's estimated annual entitlement, as adjusted for any revisions in cost, enrollment, and other data relevant to computing the charter school's annual entitlement, less any funding already apportioned to the charter school.

(C) A third apportionment within 30 days of the end of each fiscal year or 30 days after receiving the data and documentation needed to compute the charter school's total annual entitlement, whichever is later. This apportionment shall be the charter school's total annual entitlement less any funding already apportioned to the charter school.

(D) Notwithstanding subparagraph (A), the initial apportionment in the 2013-14 fiscal year shall be made by October 15, 2013, or 105 days after enactment of the Budget Act of 2013, whichever is later.

(d) For purposes of this section:

(1) The California School Finance Authority shall use prior year data on pupil eligibility for free or reduced-price meals to determine eligibility pursuant to paragraph (2) of subdivision (c). A new charter school that was not operational in the prior year shall be eligible in the current year if it meets the free or reduced-price meal eligibility requirements specified in paragraph (2) of subdivision (c) based on current year data. Prior year rent or lease costs provided by charter schools shall be used to determine eligibility for the grant program until actual rent or lease costs become known or until June 30 of each fiscal year.

(2) If prior year rent or lease costs are unavailable, and the current year lease and rent costs are not immediately available, the California School Finance Authority shall use rent or lease cost estimates provided by the charter school.

(3) (A) The California School Finance Authority shall verify costs associated with facility rents or leases, as evidenced by an executed rental or lease agreement.

(B) The verified facility agreement shall be subject to either of the following conditions:

(i) Reimbursable facility rent or lease costs do not exceed the prior year's costs on file with the authority as of the 2016-17 fiscal year, subject to a cost-of-living adjustment consistent with subparagraph (B) of paragraph (1) of subdivision (b).

(ii) The rent or lease costs of new facility agreements are at or below market rate based on an independent appraisal paid for by the charter school.

Grant eligibility

Schedule of apportionments

Eligibility

Verification of facility costs
and grant amounts

Section 47614.5
Charter School
Facility Grant Program (SB 740)
(continued)

Use of grant funds

(4) The California School Finance Authority shall verify that the grant amount awarded to each charter school is consistent with eligibility requirements as specified in this section and in regulations adopted by the authority. If it is determined by the California School Finance Authority that a charter school did not receive the proper grant award amount, either the charter school shall transfer funds back to the authority as necessary within 60 days of being notified by the authority, or the authority shall provide an additional apportionment as necessary to the charter school within 60 days of notifying the charter school, subject to the availability of funds.

(e) Funds appropriated for purposes of this section shall not be apportioned for any of the following:

(1) Units of average daily attendance generated through nonclassroom-based instruction as defined by paragraph (2) of subdivision (e) of Section 47612.5 or that does not comply with conditions or limitations set forth in regulations adopted by the state board pursuant to this section.

(2) Charter schools occupying existing school district or county office of education facilities, except that charter schools shall be eligible for the portions of their facilities that are not existing school district or county office of education facilities.

(3) Charter schools receiving reasonably equivalent facilities from their chartering authorities pursuant to Section 47614, except that charter schools shall be eligible for the portions of their facilities that are not reasonably equivalent facilities received from their chartering authorities.

(f) Funds appropriated for purposes of this section shall first be used for costs associated with facilities rents and leases, consistent with the definitions used in the California School Accounting Manual or regulations adopted by the California School Finance Authority. These funds also may be used for costs, including, but not limited to, costs associated with remodeling buildings, deferred maintenance, initially installing or extending service systems and other built-in equipment, and improving sites.

(g) If an existing charter school located in an elementary attendance area in which less than 50 percent of pupil enrollment is eligible for free or reduced-price meals relocates to an attendance area identified in paragraph (2) of subdivision (c), admissions preference shall be given to pupils who reside in the elementary school attendance area into which the charter school is relocating.

(h) The California School Finance Authority annually shall report to the department and the Director of Finance, and post information on its Internet Web site, regarding the use of funds that have been made available during the fiscal year to each charter school pursuant to the grant program.

(i) The California School Finance Authority shall annually allocate the facilities grants to eligible charter schools according to the schedule in paragraph (4) of subdivision (c) for the current school year rent and lease costs.

(j) It is the intent of the Legislature that the funding level for the Charter School Facility Grant Program for the 2012-13 fiscal year be considered the base level of funding for subsequent fiscal years.

(k) The Controller shall include instructions appropriate to the enforcement of this section in the audit guide required by subdivision (a) of Section 14502.1.

(l) The California School Finance Authority, effective with the 2013-14 fiscal year, shall be considered the senior creditor for purposes of satisfying audit findings pursuant to the audit instructions to be developed pursuant to subdivision (k).

(m) The California School Finance Authority may adopt regulations to implement this section. Any regulations adopted pursuant to this section may be adopted as emergency regulations in accordance with the Administrative Procedure Act (Chapter 3.5 (commencing with Section 11340) of Part 1 of Division 3 of the Title 2 of the Government Code). The adoption of these regulations shall be deemed to be an emergency and necessary for the immediate preservation of the public peace, health and safety, or general welfare.

(n) Notwithstanding any other law, a charter school shall be subject, with regard to this section, to audit conducted pursuant to Section 41020.

LEGISLATIVE FINDINGS AND DECLARATIONS
Education Code

(a) The Legislature finds and declares all of the following:

(1) Charter schools are part of the Public School System, as defined in Article IX of the California Constitution.

(2) Charter schools are under the jurisdiction of the Public School System and the exclusive control of the officers of the public schools, as provided in this part.

(3) Charter schools shall be entitled to full and fair funding, as provided in this part.

(b) This part shall be liberally construed to effectuate the findings and declarations set forth in this section.

Section 47615
Legislative findings
Public School System
Exclusive control

FUNDING MODEL
Education Code

It is the intent of the Legislature that each charter school be provided with operational funding that is equal to the total funding that would be available to a similar school district serving a similar pupil population, except that a charter school may not be funded as a necessary small school or a necessary small high school.

(a) This chapter applies to the calculation of operational funding for charter schools. Except as otherwise provided in this chapter, this chapter shall apply to all charter schools without regard to their sponsoring local education agency.

(b) Additional legal or fiscal responsibilities on the part of a county superintendent of schools are not imposed by this chapter, except as specifically provided in this chapter.

(a) Article 3 (commencing with Section 47636) shall not apply to a charter granted pursuant to Section 47605.5.

(b) A charter school authorized pursuant to Section 47605.5 shall receive the average daily attendance rate calculated pursuant to paragraph (1) of subdivision (c) of Section 2574 for enrolled pupils who are identified as any of the following:

(1) Probation-referred pursuant to Section 300, 601, 602, or 654 of the Welfare and Institutions Code.

(2) On probation or parole and not attending a school.

(3) Expelled for any of the reasons specified in subdivision (a) or (c) of Section 48915.

(4) Attending schools or classes established pursuant to Article 2.5 (commencing with Section 48645) of Chapter 4 of Part 27.

(c) A charter school authorized pursuant to Section 47605.5 shall be funded pursuant to the local control funding formula pursuant to Section 42238.02, as implemented by Section 42238.03, for all pupils except for pupils funded pursuant to subdivision (b).

(d) A charter school authorized pursuant to Section 47605.5 shall be funded pursuant to the local control funding formula pursuant to Section 2575 for pupils receiving the average daily attendance rate computed pursuant to paragraph (1) of subdivision (c) of Section 2574 and identified in paragraphs (1) to (4), inclusive, of subdivision (b).

For purposes of this chapter, the following terms shall be defined as follows:

(a) "General-purpose entitlement" means an amount computed by the local control funding formula pursuant to Section 42238.02, as implemented by Section 42238.03.

(b) "Economic impact aid-eligible pupils" means those pupils that are included in the economic impact aid-eligible pupil count pursuant to Section 54023. For purposes of applying Section 54023 to charter schools, "economically disadvantaged pupils" means the pupils described in paragraph (2) of subdivision (a) of Section 54026.

(c) "General-purpose funding" means those funds that consist of state aid, local property taxes, and other revenues applied toward a school district's local control funding formula, pursuant to Section 42238.02, as implemented by Section 42238.03.

(d) "Categorical aid" means aid that consists of state or federally funded programs, or both, that are apportioned for specific purposes set forth in statute or regulation.

(e) "Educationally disadvantaged pupils" means those pupils who meet federal eligibility criteria for free and reduced-price meals as specified in Section 49531, as that section read on January 1, 2013, except in regard to meals in family day care homes.

(f) "Operational funding" means all funding except funding for capital outlay.

(g) "School district of a similar type" means a school district that is serving similar grade levels.

(h) "Similar pupil population" means similar numbers of pupils by grade level, with a similar proportion of educationally disadvantaged pupils.

(i) "Sponsoring local educational agency" means the following:

(1) If a charter school petition is granted by a school district, the sponsoring local educational agency is the school district.

(2) If a charter school petition is granted by a county office of education after having been previously denied by a school district, the sponsoring local educational agency means the school district that initially denied the charter petition.

(3) If a charter school petition is granted after a local educational agency determination is reversed by the state board, the sponsoring local educational agency means the pupils' school district of residence if the school district is a basic aid school district. For purposes of this paragraph, "basic aid school district" means a school district that did not receive an apportionment of state funds in the prior fiscal year as described in subdivision (o) of Section 42238.02. The requirements of this paragraph shall not be waived by the state board pursuant to Section 33050 or any other law.

(4) For pupils attending county-sponsored charter schools authorized pursuant to Section 47605.5 who do not meet the criteria identified in subdivision (b) of Section 47631, the sponsoring local educational agency means the pupils' school district of residence.

(5) For pupils attending countywide charter schools authorized pursuant to Section 47605.6 who reside in a basic aid school district, the sponsoring local educational agency means the pupils'

Section 47630
Operational funding
equal to similar district

Section 47630.5
Operational funding

No additional responsibility on county superintendent

Section 47631
County charter school
funding formula

Section 47632
Funding model definitions
General purpose entitlement
Economic impact
aid-eligible pupils

General purpose funding

Categorical aid

Educationally disadvantaged pupil

Operational funding
School district of a similar type
Similar pupil population

Sponsoring local educational agency

Section 47632
Funding model definitions
(continued)

school district of residence. For purposes of this paragraph, “basic aid school district” means a school district that did not receive an apportionment of state funds as described in subdivision (o) of Section 42238.02 in the prior fiscal year.

Section 47633
General purpose entitlement; use of funds

Statewide average amount
General purpose entitlement

The Superintendent shall annually compute a general-purpose entitlement, funded from a combination of state aid and local funds, for each charter school as follows:

(a) The Superintendent shall annually compute the statewide average amount of general-purpose funding per unit of average daily attendance received by school districts for each of four grade level ranges: kindergarten and grades 1, 2, and 3; grades 4, 5, and 6; grades 7 and 8; and, grades 9 to 12, inclusive. For purposes of making these computations, both of the following conditions shall apply:

(1) Revenue limit funding attributable to pupils in kindergarten and grades 1 to 5, inclusive, shall equal the statewide average revenue limit funding per unit of average daily attendance received by elementary school districts; revenue limit funding attributable to pupils in grades 6, 7, and 8, shall equal the statewide average revenue limit funding per unit of average daily attendance received by unified school districts; and revenue limit funding attributable to pupils in grades 9 to 12, inclusive, shall equal the statewide average revenue limit funding per unit of average daily attendance received by high school districts.

(2) Revenue limit funding received by school districts shall exclude the value of any benefit attributable to the presence of necessary small schools or necessary small high schools within the school district.

Multiply by charter school ADA

(b) The Superintendent shall multiply each of the four amounts computed in subdivision (a) by the charter school’s average daily attendance in the corresponding grade level ranges. The resulting figure shall be the amount of the charter school’s general-purpose entitlement, which shall be funded through a combination of state aid and local funds. From funds appropriated for this purpose pursuant to Section 14002, the Superintendent shall apportion to each charter school this amount, less local funds allocated to the charter school pursuant to Section 47635 and any amount received pursuant to subparagraph (B) of paragraph (3) of subdivision (e) of Section 36 of Article XIII of the California Constitution.

Use of funds for any public school purpose determined by board

(c) General-purpose entitlement funding may be used for any public school purpose determined by the governing body of the charter school.

(d) Commencing with the 2013–14 fiscal year, this section shall be used only for purposes of allocating revenues received pursuant to subparagraph (B) of paragraph (3) of subdivision (e) of Section 36 of Article XIII of the California Constitution.

(e) This section shall become inoperative on July 1, 2033, and, as of January 1, 2034, is repealed, unless a later enacted statute, that becomes operative on or before January 1, 2034, deletes or extends the dates on which it becomes inoperative and is repealed.

Section 47634.2
Nonclassroom-based funding determination and allocation

(a) (1) Notwithstanding any other provision of law, the amount of funding to be allocated to a charter school on the basis of average daily attendance that is generated by pupils engaged in nonclassroom-based instruction, as defined by paragraph (2) of subdivision (d) of Section 47612.5, including funding provided on the basis of average daily attendance pursuant to Sections 47613.1, 47633, 47634, and 47664, shall be adjusted by the State Board of Education. The State Board of Education shall adopt regulations setting forth criteria for the determination of funding for nonclassroom-based instruction, at a minimum the regulation shall specify that the nonclassroom-based instruction is conducted for the instructional benefit of the pupil and substantially dedicated to that function. In developing these criteria and determining the amount of funding to be allocated to a charter school pursuant to this section, the State Board of Education shall consider, among other factors it deems appropriate, the amount of the charter school’s total budget expended on certificated employee salaries and benefits and on schoolsites, as defined in paragraph (3) of subdivision (d) of Section 47612.5, and the teacher-to-pupil ratio in the school.

(2) For the 2001-02 fiscal year only, the amount of funding determined by the State Board of Education pursuant to this section shall not be less than 90 percent of the unadjusted amount to which a charter school would otherwise be entitled on the basis of average daily attendance.

(3) For the 2002-03 fiscal year, the amount of funding determined by the State Board of Education pursuant to this section shall not be more than 80 percent of the unadjusted amount to which a charter school would otherwise be entitled, unless the State Board of Education determines that a greater or lesser amount is appropriate based on the criteria specified in paragraph (1) of subdivision (a).

(4) For the 2003-04 fiscal year and each fiscal year thereafter, the amount of funding determined by the State Board of Education pursuant to this section shall not be more than 70 percent of the unadjusted amount to which a charter school would otherwise be entitled, unless the State Board of Education determines that a greater or lesser amount is appropriate based on the criteria specified in paragraph (1) of subdivision (a).

(5) This section does not authorize the board to adjust the amount of funding a charter school receives on the basis of average daily attendance generated through classroom-based instruction, as defined for purposes of calculating average daily attendance for classroom-based instruction

Section 47634.2
Nonclassroom-based funding
determination and allocation
(continued)

apportionments by paragraph (1) of subdivision (d) of Section 47612.5.

(b) (1) The State Board of Education shall appoint an advisory committee to recommend criteria to the board in accordance with this section if it has not done so by the effective date of the act adding this section. The advisory committee shall include, but is not limited to, representatives from school district superintendents, charter schools, teachers, parents, members of the governing boards of school districts, county superintendents of schools, and the Superintendent of Public Instruction.

(2) If a charter school submits a substantially complete request for a determination for funding by February 13, 2002, and the State Board of Education does not act on that request by March 19, 2002, full funding is automatically granted for the 2001-02 fiscal year, but the charter school shall reapply for a determination for funding for the 2002-03 fiscal year.

(3) The determination for funding shall be on a percentage basis and the superintendent shall implement the determination for funding by reducing the charter school's reported average daily attendance by the determination for funding percentage specified by the State Board of Education.

(4) If the State Board of Education denies request for a determination for funding or provides a reduction as authorized by subdivision (a), the board shall, in writing, give the reasons for its denial or reduction and, if appropriate, may describe how any deficiencies or problems may be addressed.

(c) Each charter school offering nonclassroom-based instruction shall, in each report provided to the Superintendent of Public Instruction for apportionment purposes, identify the portion of its average daily attendance that is generated through nonclassroom-based instruction as defined in paragraph (2) of subdivision (d) of Section 47612.5.

(d) Notwithstanding any other provision of law, charter schools shall be subject, with regard to subdivisions (c) and (d) of Section 47612.5 and this section, to audits conducted pursuant to Section 41020.

(a) A charter school that elects to receive its funding directly, pursuant to Section 47651, may apply individually for federal and state categorical programs, not excluded in this section, but only to the extent it is eligible for funding and meets the provisions of the program. For purposes of determining eligibility for, and allocation of, state or federal categorical aid, a charter school that applies individually shall be deemed to be a school district, except as otherwise provided in this chapter.

(b) A charter school that does not elect to receive its funding directly, pursuant to Section 47651, may apply, in cooperation with its chartering authority, for federal and state categorical programs not specified in this section, but only to the extent it is eligible for funding and meets the provisions of the program.

(c) Notwithstanding any other law, a charter school shall not apply directly for categorical programs for which services are exclusively or almost exclusively provided by a county office of education.

(d) Consistent with subdivision (c), a charter school shall not receive direct funding for any of the following county-administered categorical programs:

(1) American Indian Education Centers.

(2) County Office Fiscal Crisis and Management Assistance Team.

(3) The K-12 High Speed Network.

(e) A charter school may apply separately for district-level or school-level grants associated with any of the categorical programs specified in subdivision (d).

Section 47634.4
Right to apply for federal funding
and state categorical funding

Programs counted
toward block grants

(a) A sponsoring local educational agency shall annually transfer to each of its charter schools funding in lieu of property taxes equal to the lesser of the following two amounts:

(1) The average amount of property taxes per unit of average daily attendance, including average daily attendance attributable to charter schools, received by the local educational agency, multiplied by the charter school's average daily attendance.

(2) The local control funding formula grant funding computed pursuant to subdivision (d) of Section 42238.02, per unit of average daily attendance, multiplied by the charter school's average daily attendance in each of the four corresponding grade level ranges: kindergarten and grades 1, 2, and 3; grades 4, 5, and 6; grades 7 and 8; and grades 9 to 12, inclusive.

(3) Notwithstanding paragraph (2), until the Superintendent determines that a charter school is funded pursuant to Section 42238.02, the Superintendent shall apportion funding per unit of average daily attendance pursuant to this article. The base grant for purposes of paragraph (2) shall be the lesser of the amount calculated pursuant to paragraph (2) or the sum of the entitlements for the charter school in the specified fiscal year as computed pursuant to paragraphs (1) to (4), inclusive, of subdivision (a), and paragraph (3) of subdivision (b), of Section 42238.03, multiplied by the ratio of local control funding formula base grant funding computed pursuant to subdivision (d) of Section 42238.02 to the local control funding formula amount for the fiscal year computed pursuant to Section 42238.02.

Section 47635
Funding in lieu of property taxes

Section 47635

Funding in lieu of property taxes

(continued)

Transfer based on preceding fiscal year (August-February)

(4) If the sum of the funding transferred pursuant to this subdivision and the funding calculated pursuant to subdivision (e) of Section 42238.03 exceeds the sum of the amounts calculated pursuant to subdivisions (e), (f), and (i) of Section 42238.02, the excess funding shall be used to offset funding calculated pursuant to subdivision (e) of Section 42238.03.

(b) The sponsoring local educational agency shall transfer funding in lieu of property taxes to the charter school in monthly installments, by no later than the 15th of each month.

(1) For the months of August to February, inclusive, a charter school's funding in lieu of property taxes shall be computed based on the amount of property taxes received by the sponsoring local educational agency during the preceding fiscal year, as reported to the Superintendent for purposes of the second principal apportionment. A sponsoring local educational agency shall transfer to the charter school the charter school's estimated annual entitlement to funding in lieu of property taxes as follows:

(A) Six percent in August.

(B) Twelve percent in September.

(C) Eight percent each month in October, November, December, January, and February.

Transfer based on estimates (March-June)

(2) For the months of March to June, inclusive, a charter school's funding in lieu of property taxes shall be computed based on the amount of property taxes estimated to be received by the sponsoring local educational agency during the fiscal year, as reported to the Superintendent for purposes of the first principal apportionment. A sponsoring local educational agency shall transfer to each of its charter schools an amount equal to one-sixth of the difference between the school's estimated annual entitlement to funding in lieu of property taxes and the amounts provided pursuant to paragraph (1). An additional one-sixth of this difference shall be included in the amount transferred in the month of March.

Transfer of differences (July)

(3) For the month of July, a charter school's funding in lieu of property taxes shall be computed based on the amount of property taxes estimated to be received by the sponsoring local educational agency during the prior fiscal year, as reported to the Superintendent for purposes of the second principal apportionment. A sponsoring local educational agency shall transfer to each of its charter schools an amount equal to the remaining difference between the school's estimated annual entitlement to funding in lieu of property taxes and the amounts provided pursuant to paragraphs (1) and (2).

Final adjustment (June)

(4) Notwithstanding subdivision (a) of Section 14002, final adjustments to the amount of funding in lieu of property taxes allocated to a charter school shall be made in June, in conjunction with the third recertification of annual apportionments to schools.

(5) Subdivision (a) and paragraphs (1) to (4), inclusive, do not apply for pupils who reside in, and are otherwise eligible to attend a school in, a basic aid school district, but who attend a charter school in a nonbasic aid school district. With regard to these pupils, the sponsoring basic aid school district shall transfer to the charter school an amount of funds equivalent to the local control funding formula grant pursuant to Section 42238.02, as implemented by Section 42238.03, earned through average daily attendance by the charter school for each pupil's attendance, not to exceed the average property tax share per unit of average daily attendance for pupils residing and attending in the basic aid school district. The transfer of funds shall be made in not fewer than two installments at the request of the charter school, the first occurring not later than February 1 and the second not later than June 1 of each school year. Payments shall reflect the average daily attendance certified for the time periods of the first and second principal apportionments, respectively. The Superintendent may not apportion any funds for the attendance of pupils described in this subdivision unless the amount transferred by the basic aid school district is less than the local control funding formula grant pursuant to Section 42238.02, as implemented by Section 42238.03, earned by the charter school, in which event the Superintendent shall apportion the difference to the charter school from state funds.

Section 47636

Application for funding from other sources

(a) This chapter shall not prevent a charter school from negotiating with a local educational agency for a share of operational funding from sources not otherwise set forth in this chapter including, but not limited to, all of the following:

(1) Forest reserve revenues and other operational revenues received due to harvesting or extraction of minerals or other natural resources.

(2) Sales and use taxes, to the extent that the associated revenues are available for noncapital expenses of public schools.

(3) Parcel taxes, to the extent that the associated revenues are available for noncapital expenses of public schools.

(4) Ad valorem property taxes received by a school district which exceed its local control funding formula entitlement pursuant to Section 42238.02, as implemented by Section 42238.03.

(5) "Basic aid" received by a school district pursuant to Section 6 of Article IX of the California Constitution.

(b) This section shall become operative July 1, 2006.

Section 47638

Lottery funds; allocation

For purposes of determining eligibility for, and allocations of, lottery funds, a charter school shall be deemed to be a school district. The State Department of Education shall determine each charter school's appropriate share of statewide total average daily attendance and include this information in its transmittals to the Controller for use in computing allocations of lottery funds.

SPECIAL EDUCATION
Education Code

For the purposes of this article, "local educational agency" means a school district as defined in Section 41302.5 or a charter school that is deemed a local educational agency pursuant to Section 47641. As used in this article, "local educational agency" also means a charter school that is responsible for complying with all provisions of the Individuals with Disabilities Education Act (20 U.S.C. Sec. 1400 et seq.) and implementing regulations as they relate to local educational agencies.

(a) A charter school that includes in its petition for establishment or renewal, or that otherwise provides, verifiable, written assurances that the charter school will participate as a local educational agency in a special education plan approved by the State Board of Education shall be deemed a local educational agency for the purposes of compliance with federal law (Individuals with Disabilities Education Act; 20 U.S.C. Sec. 1400 et seq.) and for eligibility for federal and state special education funds. A charter school that is deemed a local educational agency for the purposes of special education pursuant to this article shall be permitted to participate in an approved special education local plan that is consistent with subdivision (a), (b), or (c) of Section 56195.1.

(b) A charter school that was granted a charter by a local educational agency that does not comply with subdivision (a) may not be deemed a local educational agency pursuant to this article, but shall be deemed a public school of the local educational agency that granted the charter.

(c) A charter school that has been granted a charter by the State Board of Education, and for which the board has delegated its supervisory and oversight responsibilities pursuant to paragraph (1) of subdivision (k) of Section 47605, and does not comply with subdivision (a), shall be deemed a public school of the local educational agency to which the board has delegated its supervisory and oversight responsibilities.

(d) A charter school that has been granted a charter by the State Board of Education, and for which the board has not delegated its supervisory and oversight responsibilities pursuant to paragraph (1) of subdivision (k) of Section 47605, may not be deemed a local educational agency unless the charter school complies with subdivision (a).

Notwithstanding Section 47651, all state and federal funding for special education apportioned on behalf of pupils enrolled in a charter school shall be included in the allocation plan adopted pursuant to subdivision (i) of Section 56195.7 or Section 56836.05, or both, by the special education local plan area that includes the charter school.

If the approval of a petition for a charter school requires a change to the allocation plan developed pursuant to subdivision (i) of Section 56195.7 or Section 56836.05, the change shall be adopted pursuant to the policymaking process of the special education local plan area.

For each charter school deemed a local educational agency for the purposes of special education, an amount equal to the amount computed pursuant to Section 56836.148 for the special education local plan area in which the charter school is included shall be apportioned by the Superintendent pursuant to the local allocation plan developed pursuant to subdivision (i) of Section 56195.7 or Section 56836.05, or both.

An agency reviewing a request by a charter school to participate as a local educational agency in a special education local plan area may not treat the charter school differently from the manner in which it treats a similar request made by a school district. In reviewing and approving a request by a charter school to participate as a local educational agency in a special education local plan area, a local or state agency shall ensure all of the following:

- (a) The special education local plan area complies with Section 56140.
- (b) The charter school participates in state and federal funding for special education and the allocation plan developed pursuant to subdivision (i) of Section 56195.7 or Section 56836.05 in the same manner as other local educational agencies of the special education local plan area.
- (c) The charter school participates in governance of the special education local plan area and benefits from services provided throughout the special education local plan area, in the same manner as other local educational agencies of the special education local plan area.

(a) A charter school that is deemed to be a public school of the local educational agency that granted the charter for purposes of special education shall participate in state and federal funding for special education in the same manner as any other public school of that local educational agency. A child with disabilities attending the charter school shall receive special education instruction or designated instruction and services, or both, in the same manner as a child with disabilities who attends another public school of that local educational agency. The agency that granted the charter shall ensure that all children with disabilities enrolled in the charter school receive special education and designated instruction and services in a manner that is consistent with their individualized education program and is in compliance with the federal Individuals with Disabilities Education Act (20 U.S.C. Sec. 1400 et seq.) and implementing regulations, including Section 300.209 of Title 34 of the Code of Federal Regulations.

Section 47640
"LEA" for special
education purposes defined

Section 47641
Charter school may be
LEA or school of the district

Section 47642
Charter student funding
included in SELPA allocation plans

Section 47643
Change in SELPA
allocation plan for charter school

Section 47644
Special education apportionment
for charter school LEA

Section 47645
Request to participate in SELPA

Section 47646
Special education funding and
services for charter school that
is a school of the district

Section 47646

Special education funding and services for charter school that is a school of the district

(continued)

LEA to ensure equitable funding of services

(b) In administering the local operation of special education pursuant to the local plan established pursuant to Chapter 3 (commencing with Section 56205) of Part 30, in which the local educational agency that granted the charter participates, the local educational agency that granted the charter shall ensure that each charter school that is deemed a public school for purposes of special education receives an equitable share of special education funding and services consisting of either, or both, of the following:

(1) State and federal funding provided to support special education instruction or designated instruction and services, or both, provided or procured by the charter school that serves pupils enrolled in and attending the charter school. Notwithstanding any other provision of this chapter, a charter school may report average daily attendance to accommodate eligible pupils who require extended year services as part of an individualized education program.

(2) Any necessary special education services, including administrative and support services and itinerant services, that are provided by the local educational agency on behalf of pupils with disabilities enrolled in the charter school.

(c) In administering the local operation of special education pursuant to the local plan established pursuant to Chapter 3 (commencing with Section 56205) of Part 30, in which the local educational agency that granted the charter participates, the local educational agency that granted the charter shall ensure that each charter school that is deemed a public school for purposes of special education also contributes an equitable share of its charter school block grant funding to support districtwide special education instruction and services, including, but not limited to, special education instruction and services for pupils with disabilities enrolled in the charter school.

LEA to ensure equitable contribution by charter school

Section 47647

No charter denial solely because school may enroll from other SELPA

A local educational agency reviewing a petition for the establishment or renewal of a charter school may not refuse to grant the petition solely because the charter might enroll pupils with disabilities who reside in a special education local plan area other than the special education local plan area that includes the local educational agency reviewing the petition.

**APPORTIONMENT OF FUNDS
Education Code**

Section 47650

Charter school deemed a school district

A charter school shall be deemed to be a school district for purposes of determining the manner in which warrants are drawn on the State School Fund pursuant to Section 14041. For purposes of Section 14041, a charter school's "total amount certified" means the state aid portion of the charter school's total local control funding formula allocation pursuant to Section 42238.02, as implemented by Section 42238.03.

Section 47651

Receipt of state aid

(a) A charter school may receive the state aid portion of the charter school's total local control funding formula allocation pursuant to Section 42238.02, as implemented by Section 42238.03, directly or through the local educational agency that either grants its charter or was designated by the state board.

Direct funded

(1) In the case of a charter school that elects to receive its funding directly, the warrant shall be drawn in favor of the county superintendent of schools of the county in which the local educational agency that granted the charter, or was designated by the state board as the oversight agency pursuant to paragraph (1) of subdivision (k) of Section 47605, is located, for deposit to the appropriate funds or accounts of the charter school in the county treasury. The county superintendent of schools is authorized to establish appropriate funds or accounts in the county treasury for each charter school.

Non-direct funded

(2) In the case of a charter school that does not elect to receive its funding directly pursuant to this section, the warrant shall be drawn in favor of the county superintendent of schools of the county in which the local educational agency that granted the charter is located or was designated the oversight agency by the state board pursuant to paragraph (1) of subdivision (k) of Section 47605, for deposit to the appropriate funds or accounts of the local educational agency.

State-approved charter

(3) In the case of a charter school, the charter of which was granted by the state board, but for which the state board has not delegated oversight responsibilities pursuant to paragraph (1) of subdivision (k) of Section 47605, the warrant shall be drawn in favor of the county superintendent of schools in the county where the local educational agency is located that initially denied the charter that was later granted by the state board. The county superintendent of schools is authorized to establish appropriate funds or accounts in the county treasury for each charter school.

Notify county

(b) On or before June 1 of each year, a charter school electing to receive its funding directly shall so notify the county superintendent of schools of the county in which the local educational agency that granted the charter is located or, in the case of charters for which the state board has designated an oversight agency pursuant to paragraph (1) of subdivision (k) of Section 47605, the county superintendent of schools of the county in which the designated oversight agency is located. An election to receive funding directly applies to all funding that the charter school is eligible to receive including, but not limited to, the local control funding formula allocation pursuant to Section 42238.02, as implemented by Section 42238.03, other state and federal categorical aid, and lottery funds.

(a) Notwithstanding Section 41330, a charter school in its first year of operation shall be eligible to receive funding for the advance apportionment based on an estimate of average daily attendance for the current fiscal year, as approved by the local educational agency that granted its charter and the county office of education in which the charter-granting agency is located. For charter schools approved by the state board, estimated average daily attendance shall be submitted directly to, and approved by, the department. Not later than five business days following the end of the first 20 schooldays, a charter school receiving funding pursuant to this section shall report to the department its actual average daily attendance for that first month, and the Superintendent shall adjust immediately, but not later than 45 days, the amount of its advance apportionment accordingly.

Section 47652
Advance apportionment for first year of operation

(b) In addition to funding received pursuant to Section 41330, a charter school in its second or later year of operation also shall be eligible to receive an advance apportionment pursuant to the process and conditions described in subdivision (a) in any year in which the charter school is adding at least one grade level. The average daily attendance funded for a new grade level shall not exceed the portion of the certified average daily attendance at the second principal apportionment for the prior year that was attributable to pupils in the highest grade served by the charter school.

Advance apportionment for new grade levels

(c) A charter school in its first year of operation may only commence instruction within the first three months of the fiscal year beginning July 1 of that year. A charter school shall not be eligible for an apportionment pursuant to subdivision (a), or any other apportionment for a fiscal year in which instruction commenced after September 30 of that fiscal year.

First year of operations must start by September 30

(a) A charter school required to be regarded as a continuing charter school by the department pursuant to subparagraph (E) of paragraph (5) of subdivision (a) of Section 47605, or subparagraph (B) of paragraph (5) of subdivision (c) of Section 47605.1, subdivision (d) of Section 47605.9, or paragraph (3) of subdivision (b) of Section 47612.7 shall notify the department by May 15 before the fiscal year in which the charter school is to be regarded as a continuing charter school by the department, in a format to be established by the Superintendent. The Superintendent may require attendance records or other documents necessary to verify that instruction had been provided at the site be submitted to substantiate that the charter school meets the requirements to be regarded as a continuing charter school by the department.

Section 47653
Continuing charter school

(b) Failure of an eligible charter school or its chartering authority to provide notice and substantiation to the department in accordance with subdivision (a) relieves the department of any obligation to regard the charter school as a continuing charter school.

(c) A charter school petition authorized by a different chartering authority pursuant to subparagraph (A) of paragraph (5) of subdivision (a) of Section 47605, subparagraph (A) of paragraph (5) of subdivision (c) of Section 47605.1, subdivision (c) of Section 47605.9, or subdivision (b) of Section 47612.7 shall be effective before the date instruction begins for the current fiscal year.

(d) A charter school regarded as a continuing charter school in accordance with this section shall commence instruction within the first three months of the fiscal year beginning July 1 of the year the petition is effective pursuant to subdivision (c). A charter school shall not be eligible for an apportionment for any fiscal year in which instruction commenced after September 30 of that fiscal year.

(e) A charter school regarded as a continuing charter school by the department shall not be eligible for funding as a new charter school pursuant to subdivision (a) of Section 47652.

(f) The requirements of this section shall not be waived by the state board pursuant to Section 33050 or any other law.

The definitions set forth in this section apply for purposes of this part and Chapter 7 (commencing with Section 42238) of Part 24 of Division 3. "Affected charter school" means a charter school that has been, or is proposed to be, affected by an action to comply with subparagraph (A) of paragraph (5) of subdivision (a) of Section 47605, subparagraph (A) of paragraph (5) of subdivision (c) of Section 47605.1, subdivision (c) of Section 47605.9, or subdivision (b) of Section 47612.7. Affected charter schools include all of the following charter school types:

Section 47654
Affected charter school types

(a) (1) "Acquiring charter school" means a state charter school site deemed a continuing charter school that has wholly combined with one or more other affected state charter school sites by an action taken to comply with subdivision (c) of Section 47605.9. This paragraph shall become inoperative on July 1, 2026, unless its operation is extended by the Legislature.

(2) On the date paragraph (1) becomes inoperative, a charter school that meets the definition of an acquiring charter school pursuant to paragraph (1) shall no longer be regarded as a continuing charter school.

Continuing charter school

(b) "Continuing charter school" means a charter school that the department has deemed to have met the requirements of Section 47653.

Divided charter school

(c) (1) "Divided charter school" means a continuing charter school that has had one or more of its sites become a separately authorized charter school by an action to comply with subparagraph (A) of paragraph (5) of subdivision (a) of Section 47605, subparagraph (A) of paragraph (5) of subdivision (c) of Section 47605.1, subdivision (c) of Section 47605.9, or subdivision (b) of Section 47612.7.

Section 47654
Affected charter school types

(continued)

	<p>(2) The “restructured portion of a divided charter school” means the site or sites of the divided charter school that each become separately authorized by an action taken to comply with subparagraph (A) of paragraph (5) of subdivision (a) of Section 47605, subparagraph (A) of paragraph (5) of subdivision (c) of Section 47605.1, subdivision (c) of Section 47605.9, or subdivision (b) of Section 47612.7, and that is regarded as a continuing charter school in accordance with Section 47653</p> <p>(3) The “remaining portion of a divided charter school” means the portion of the original charter school remaining after action is taken to bring sites, resource centers, satellite facilities, and meeting spaces into compliance with subparagraph (A) of paragraph (5) of subdivision (a) of Section 47605, subparagraph (A) of paragraph (5) of subdivision (c) of Section 47605.1, subdivision (c) of Section 47605.9, or subdivision (b) of Section 47612.7.</p>
Original charter school	<p>(d) “Original charter school” means a charter school as it existed before an action taken to comply with subparagraph (A) of paragraph (5) of subdivision (a) of Section 47605, subparagraph (A) of paragraph (5) of subdivision (c) of Section 47605.1, subdivision (c) of Section 47605.9, or subdivision (b) of Section 47612.7</p>
Restructured charter school	<p>(e) “Restructured charter school” means a transferred charter school, acquiring charter school, or divided charter school.</p>
Transferred charter school	<p>(f) “Transferred charter school” means a continuing charter school that is wholly authorized by a different chartering authority to comply with subparagraph (A) of paragraph (5) of subdivision (a) of Section 47605, subparagraph (A) of paragraph (5) of subdivision (c) of Section 47605.1, subdivision (c) of Section 47605.9, or subdivision (b) of Section 47612.7.</p>

Section 47655
Transfer of debt
and liabilities owed to the state

(a) Notwithstanding any other law, all debt and liabilities owed to the state for an original charter school shall transfer to a restructured charter school in accordance with this section.

(b)(1) A transferred charter school shall retain all of the debt and liabilities owed to the state incurred by, or applicable to, the original charter school for the period before the fiscal year the restructuring becomes effective.

(2) An acquiring charter school shall assume all of the debt and liabilities owed to the state incurred by, or applicable to, the original charter schools for the period before the fiscal year the restructuring becomes effective. This paragraph shall become inoperative on July 1, 2026, unless its operation is extended by the Legislature.

(3) For a divided charter school, the debt and liabilities owed to the state incurred by, or applicable to, the original charter school for the period before the fiscal year the restructuring becomes effective shall be the responsibility of the remaining portion of a divided charter school. If the remaining portion of a divided charter school closes, unassigned debt and liability owed to the state shall be the responsibility of the restructured charter schools.

Section 47660
Charter enrollment and ADA
not included in sponsoring LEA

For purposes of computing eligibility for, and entitlements to, general purpose funding and operational funding for categorical programs, the enrollment and average daily attendance of a sponsoring local educational agency shall exclude the enrollment and attendance of pupils in its charter schools funded pursuant to this chapter.

Section 47662
Sponsoring LEA
property tax revenues

For purposes of Section 42238.02, as implemented by Section 42238.03, the property tax revenues received by a sponsoring local educational agency pursuant to Chapter 3.5 (commencing with Section 75) and Chapter 6 (commencing with Section 95) of Part 0.5 of the Revenue and Taxation Code shall be reduced by the amount of funding in lieu of property taxes allocated to a charter school or schools pursuant to Section 47635.

Section 47663
Pupil eligible
to attend school district
other than basic aid school district

(a) (1) For a pupil of a charter school sponsored by a basic aid school district who resides in, and is otherwise eligible to attend, a school district other than a basic aid school district, the Superintendent shall apportion to the sponsoring school district an amount equal to 70 percent of the local control funding formula base grant computed pursuant to subdivision (d) of Section 42238.02, per unit of average daily attendance that would have been apportioned to the school district that the pupil resides in, and would otherwise have been eligible to attend.

(2) Notwithstanding paragraph (1), until the Superintendent determines that the school district the pupil resides in, and would otherwise have been eligible to attend, is funded pursuant to Section 42238.02, the Superintendent shall apportion, for average daily attendance pursuant to this article, the lesser of the amount calculated pursuant to paragraph (1) or 70 percent of the sum of the entitlements for the school district that the pupil resides in, and would otherwise have been eligible to attend, for the specified fiscal year as computed pursuant to paragraphs (1) to (4), inclusive, of subdivision (a), and paragraph (3) of subdivision (b), of Section 42238.03, divided by the average daily attendance for that fiscal year and then multiplied by the ratio of local control funding formula base grant funding computed pursuant to subdivision (d) of Section 42238.02 to the local control funding formula amount for the fiscal year computed pursuant to Section 42238.02.

(3) If the entitlements for the school district the pupil resides in, and would otherwise have been eligible to attend, as computed pursuant to paragraphs (1) to (4), inclusive, of subdivision (a), and paragraph (3) of subdivision (b), of Section 42238.03, include funding calculated pursuant to Article 4 (commencing with Section 42280) of Chapter 7 of Part 24 of Division 3 for a fiscal year, paragraph (2) shall not apply and the apportionment of state funds for the average daily attendance credited pursuant to this section for that fiscal year shall be calculated pursuant to paragraph (1).

(b) A school district that loses basic aid status as a result of transferring property taxes to a charter school or schools pursuant to Section 47635 for pupils who reside in, and are otherwise eligible to attend, a school district other than the school district that sponsors the charter school, shall be eligible to receive a pro rata share of funding provided by subdivision (a), with the proration factor calculated as the ratio of the following:

(1) The amount of property taxes that the school district receives in excess of its total base grant per unit of average daily attendance calculated pursuant to Section 42238.02, as implemented by Section 42238.03, before any transfers made pursuant to Section 47635, except for transfers in lieu of property taxes made for pupils who reside in, and would otherwise be eligible to attend, a school of the school district.

(2) The total amount in lieu of property taxes transferred pursuant to Section 47635 to the charter school or schools that it sponsors, except for transfers in lieu of property taxes made for pupils who reside in, and would otherwise be eligible to attend, a school of the school district.

(c) In no event shall the amount provided pursuant to this section exceed the amount in lieu of property taxes transferred on behalf of charter school pupils who do not reside in the school district, less the proportionate amount of base grant state aid provided pursuant to Section 42238.02, as implemented by Section 42238.03, that is attributable to the charter school pupils who do not reside in the school district.

(d) The Superintendent shall not apportion funds for the attendance of a pupil in a charter school of a nonbasic aid school district who resides in, and is otherwise eligible to attend school in, a basic aid school district unless the pupil is subject to the exceptions set forth in paragraph (5) of subdivision (b), and subdivision (c), of Section 47635.

(e) For purposes of this section, "basic aid school district" means a school district that does not receive from the state, for any fiscal year in which the subdivision is applied, an apportionment of state funds as described in subdivision (o) of Section 42238.02.

PART II: ADDITIONAL STATUTES RELATED TO FUNDING AND ACCOUNTABILITY

COUNTY OFFICES OF EDUCATION OVERSIGHT; FCMAT

Education Code

Section 1240 County Superintendent oversight

The county superintendent of schools shall do all of the following:

- (a) Superintend the schools of that county.
- (b) Maintain responsibility for the fiscal oversight of each school district in that county pursuant to the authority granted by this code.
- (c) (1) Visit and examine each school in the county at reasonable intervals to observe its operation and to learn of its problems. The county superintendent of schools annually may present a report of the state of the schools in the county, and of the county office of education, including, but not limited to, observations from visiting the schools, to the board of education and the board of supervisors of the county.
(2) (A) (i) Commencing with the 2021–22 fiscal year, the Superintendent shall identify a list of schools, which shall include charter schools, for which the county superintendent, or a designee, shall inspect annually, and about which the county superintendent, or a designee, shall submit an annual report, at a regularly scheduled November board meeting, to the governing board of each school district under the jurisdiction of the county superintendent, the county board of education of that county, and the board of supervisors of that county, that describes the state of the schools in the county. The list established in the 2021–22 fiscal year shall also be used as the list established in the 2022–23 and 2023–24 fiscal years. The list of schools established pursuant to this section shall be reestablished in the 2024–25 fiscal year and again every three fiscal years thereafter. Each list shall be established in accordance with clause (ii), and shall be used for inspections beginning the following fiscal year.
(ii) The list of schools pursuant to clause (i) shall be compiled as follows:
(I) The Superintendent shall include on the list all schools that were most recently identified for comprehensive support and improvement and additional targeted support and improvement pursuant to the federal Every Student Succeeds Act (Public Law 114-95) or identified as low performing under the federal Elementary and Secondary Education Act of 1965 (Public Law 89-10), or any subsequent amendments to that act. For the list established in the 2021–22, 2022–23, and 2023–24 fiscal years, the Superintendent shall use the list of schools identified in the 2019–20 fiscal year for comprehensive support and improvement and for additional targeted support and improvement.
(II) The Superintendent shall include on the list all schools where 15 percent or more of the teachers are holders of a permit or certificate, such as a temporary or short-term permit, a substitute permit, a waiver, an intern credential, or any other authorization that is a lesser certification than a preliminary or clear California teaching credential. With the exception of alternative schools, all schools within a local educational agency that fail to meet the requirements of Sections 44258.9 and 60900 shall be included on the list for the applicable reporting cycle.
(III) The list of schools compiled pursuant to clause (i) shall exclude alternative schools within the meaning of subdivision (d) of Section 52052 and other schools accepted for participation in the Dashboard Alternative School Status program by the department.
(iii) The annual report shall include the determinations for each school made by the county superintendent, or the county superintendent's designee, regarding the status of all of the circumstances listed in subparagraph (E) and teacher misassignments and teacher vacancies, as described in Section 44258.9, and the county superintendent, or the county superintendent's designee, shall use a standardized template to report the circumstances listed in subparagraph (E) and teacher misassignments and teacher vacancies, as described in Section 44258.9, unless the current annual report being used by the county superintendent, or the county superintendent's designee, already includes those details with the same level of specificity that is otherwise required by this subdivision.
(B) The county superintendent of the Counties of Alpine, Amador, Del Norte, Mariposa, Plumas, and Sierra, and the City and County of San Francisco shall contract with another county office of education or an independent auditor to conduct the required visits and make all reports required by this paragraph.
(C) On a quarterly basis, the county superintendent, or the county superintendent's designee, shall report the results of the visits and reviews conducted that quarter to the governing board of the school district at a regularly scheduled meeting held in accordance with public notification requirements. The results of the visits and reviews shall include the determinations of the county superintendent, or the county superintendent's designee, for each school regarding the status of all of the circumstances listed in subparagraph (E) and teacher misassignments and teacher vacancies, as described in Section 44258.9. If the county superintendent, or the county superintendent's designee, conducts no visits or reviews in a quarter, the quarterly report shall report that fact.
(D) The visits made pursuant to this paragraph shall be conducted at least annually and shall meet the following criteria:
(i) Minimize disruption to the operation of the school.
(ii) Be performed by individuals who meet the requirements of Section 45125.1.

(iii) Consist of not less than 25 percent unannounced visits in each county. During unannounced visits in each county, the county superintendent shall not demand access to documents or specific school personnel. Unannounced visits shall only be used to observe the condition of school repair and maintenance, and the sufficiency of instructional materials, as defined by Section 60119.

(E) The priority objective of the visits made pursuant to this paragraph shall be to determine the status of all of the following circumstances:

(i) Sufficient textbooks, as defined in Section 60119 and as specified in subdivision (i).

(ii) The condition of a facility that poses an emergency or urgent threat to the health or safety of pupils or staff, as described in school district policy or paragraph (1) of subdivision (c) of Section 17592.72.

(iii) The accuracy of data reported on the school accountability report card with respect to the availability of sufficient textbooks and instructional materials, as defined by Section 60119, and the safety, cleanliness, and adequacy of school facilities, including good repair, as required by Sections 17014, 17032.5, 17070.75, and 17089.

(F) The county superintendent may make the status determinations described in subparagraph (E) during a single visit or multiple visits. In determining whether to make a single visit or multiple visits for this purpose, the county superintendent shall take into consideration factors such as cost-effectiveness, disruption to the schoolsite, deadlines, and the availability of qualified reviewers.

(G) If the county superintendent determines that the condition of a facility poses an emergency or urgent threat to the health or safety of pupils or staff as described in school district policy or paragraph (1) of subdivision (c) of Section 17592.72, or is not in good repair, as specified in subdivision (d) of Section 17002 and required by Sections 17014, 17032.5, 17070.75, and 17089, the county superintendent, among other things, may do any of the following:

(i) Return to the school to verify repairs.

(ii) Prepare a report that specifically identifies and documents the areas or instances of noncompliance if the school district has not provided evidence of successful repairs within 30 days of the visit of the county superintendent or, for major projects, has not provided evidence that the repairs will be conducted in a timely manner. The report may be provided to the governing board of the school district. If the report is provided to the school district, it shall be presented at a regularly scheduled meeting held in accordance with public notification requirements. The county superintendent shall post the report on the internet website of the county superintendent. The report shall be removed from the internet website when the county superintendent verifies the repairs have been completed.

(d) Distribute all laws, reports, circulars, instructions, and blanks that the county superintendent may receive for the use of the school officers.

(e) Annually, on or before September 15, present a report to the governing board of the school district and the Superintendent regarding the fiscal solvency of a school district with a disapproved budget, qualified interim certification, or a negative interim certification, or that is determined to be in a position of fiscal uncertainty pursuant to Section 42127.6.

(f) Keep in the office of the county superintendent the reports of the Superintendent.

(g) Keep a record of the official acts of the county superintendent and of all the proceedings of the county board of education, including a record of the standing, in each study, of all applicants for certificates who have been examined, which shall be open to the inspection of an applicant or an authorized agent of the applicant.

(h) Enforce the course of study.

(i) (1) Enforce the use of state textbooks and instructional materials and of high school textbooks and instructional materials regularly adopted by the proper authority in accordance with Section 51050.

(2) For purposes of this subdivision, sufficient textbooks or instructional materials has the same meaning as in subdivision (c) of Section 60119.

(3) (A) Commencing with the 2022–23 school year, if a school is identified as specified in subparagraph (A) of paragraph (2) of subdivision (c), the county superintendent specifically shall review that school at least annually as a priority school. A review conducted for purposes of this paragraph shall be completed by the fourth week of the school year.

(B) In order to facilitate the review of instructional materials before the fourth week of the school year, the county superintendent in a county with 200 or more schools that are identified as specified in subparagraph (A) of paragraph (2) of subdivision (c) may use a combination of visits and written surveys of teachers for the purpose of determining sufficiency of textbooks and instructional materials in accordance with subparagraph (A) of paragraph (1) of subdivision (a) of Section 60119 and as defined in subdivision (c) of Section 60119. If a county superintendent elects to conduct written surveys of teachers, the county superintendent shall visit the schools surveyed within the same academic year to verify the accuracy of the information reported on the surveys. If a county superintendent surveys teachers at a school in which the county superintendent has found sufficient textbooks and instructional materials for the previous two consecutive years and determines that the school does not have sufficient textbooks or instructional materials, the county superintendent shall, within 10 business days, provide a copy of the insufficiency report to the school district as set forth in paragraph (4).

Section 1240
County Superintendent oversight

(continued)

Competitive grant recipient requirements

- (C) For purposes of this paragraph, “written surveys” may include paper and electronic or online surveys.
- (4) If the county superintendent of schools determines that a school does not have sufficient textbooks or instructional materials in accordance with subparagraph (A) of paragraph (1) of subdivision (a) of Section 60119 and as defined by subdivision (c) of Section 60119, the county superintendent shall do all of the following:
- (A) Prepare a report that specifically identifies and documents the areas or instances of noncompliance.
- (B) Provide within five business days of the review, a copy of the report to the school district, as provided in subdivision (c), or, if applicable, provide a copy of the report to the school district within 10 business days pursuant to subparagraph (B) of paragraph (3).
- (C) Provide the school district with the opportunity to remedy the deficiency. The county superintendent shall ensure that the deficiency is remedied no later than the second month of the school term.
- (D) If the deficiency is not remedied as required pursuant to subparagraph (C), the county superintendent shall request the department to purchase the textbooks or instructional materials necessary to comply with the sufficiency requirement of this subdivision. If the department purchases textbooks or instructional materials for the school district, the department shall issue a public statement at the first regularly scheduled meeting of the state board occurring immediately after the department receives the request of the county superintendent and that meets the applicable public notice requirements, indicating that the district superintendent and the governing board of the school district failed to provide pupils with sufficient textbooks or instructional materials as required by this subdivision. Before purchasing the textbooks or instructional materials, the department shall consult with the school district to determine which textbooks or instructional materials to purchase. The amount of funds necessary for the purchase of the textbooks and materials is a loan to the school district receiving the textbooks or instructional materials. Unless the school district repays the amount owed based upon an agreed-upon repayment schedule with the Superintendent, the Superintendent shall notify the Controller and the Controller shall deduct an amount equal to the total amount used to purchase the textbooks and materials from the next principal apportionment of the school district or from another apportionment of state funds.
- (5) If the county superintendent of schools determines that there are insufficient textbooks or instructional materials pursuant to a resolution received in accordance with subparagraph (A) of paragraph (2) of subdivision (a) of Section 60119 and as defined by subdivision (c) of Section 60119, or as a result of receiving a report of an unresolved complaint pursuant to subdivision (e) of Section 35186 or an audit exception pursuant to subdivision (i) of Section 41020, the county superintendent shall do both of the following:
- (A) Provide the school district with the opportunity to remedy the deficiency. The county superintendent shall ensure that the deficiency is remedied no later than the second month of the school term.
- (B) If the deficiency is not remedied as required pursuant to subparagraph (A), the county superintendent shall request the department to purchase the textbooks or instructional materials necessary to comply with the sufficiency requirement of this subdivision. If the department purchases the textbooks or instructional materials for the school district, the department shall issue a public statement at the first regularly scheduled meeting of the state board occurring immediately after the department receives the request of the county superintendent and that meets the applicable public notice requirements, indicating that the district superintendent and the governing board of the school district failed to provide pupils with sufficient textbooks or instructional materials as required by this subdivision. Before purchasing the textbooks or instructional materials, the department shall consult with the school district when determining which textbooks or instructional materials to purchase. The amount of funds necessary for the purchase of the textbooks and materials is a loan to the school district receiving the textbooks or instructional materials. Unless the school district repays the amount owed based upon an agreed-upon repayment schedule with the Superintendent, the Superintendent shall notify the Controller and the Controller shall deduct an amount equal to the total amount used to purchase the textbooks and materials from the next principal apportionment of the school district or from another apportionment of state funds.
- (j) Preserve carefully all reports of school officers and teachers.
- (k) Deliver to the county superintendent’s successor, at the close of the county superintendent’s official term, all records, books, documents, and papers belonging to the office, taking a receipt for them, which shall be filed with the department.
- (l) (1) Submit two reports during the fiscal year to the county board of education in accordance with the following:
- (A) The first report shall cover the financial and budgetary status of the county office of education for the period ending October 31. The second report shall cover the period ending January 31. Both reports shall be reviewed by the county board of education and approved by the county superintendent no later than 45 days after the close of the period being reported.

(B) As part of each report, the county superintendent shall certify in writing whether or not the county office of education is able to meet its financial obligations for the remainder of the fiscal year and, based on current forecasts, for two subsequent fiscal years. The certifications shall be classified as positive, qualified, or negative, pursuant to standards prescribed by the Superintendent, for purposes of determining subsequent state agency actions pursuant to Section 1240.1. For purposes of this subdivision, a negative certification shall be assigned to a county office of education that, based upon current projections, will not meet its financial obligations for the remainder of the fiscal year or for the subsequent fiscal year. A qualified certification shall be assigned to a county office of education that may not meet its financial obligations for the current fiscal year or two subsequent fiscal years. A positive certification shall be assigned to a county office of education that will meet its financial obligations for the current fiscal year and subsequent two fiscal years. In accordance with those standards, the Superintendent may reclassify a certification. If a county office of education receives a negative certification, the Superintendent, or the Superintendent's designee, may exercise the authority set forth in subdivision (d) of Section 1630. Copies of each certification, and of the report containing that certification, shall be sent to the Superintendent at the time the certification is submitted to the county board of education. Copies of each qualified or negative certification and the report containing that certification shall be sent to the Controller at the time the certification is submitted to the county board of education.

(2) All reports and certifications required under this subdivision shall be in a format or on forms prescribed by the Superintendent, and shall be based on standards and criteria for fiscal stability adopted by the state board pursuant to Section 33127. The reports and supporting data shall be made available by the county superintendent to an interested party upon request.

(3) This subdivision does not preclude the submission of additional budgetary or financial reports by the county superintendent to the county board of education or to the Superintendent.

(4) The county superintendent is not responsible for the fiscal oversight of the community colleges in the county, however, the county superintendent may perform financial services on behalf of those community colleges.

(5) A county office of education having a negative or qualified certification, or classified as qualified or negative by the Superintendent, shall continue to be classified as qualified or negative until the next report required under this subdivision is filed.

(m) If requested, act as agent for the purchase of supplies for the city and high school districts of that county.

(n) For purposes of Section 44421.5, report to the Commission on Teacher Credentialing the identity of a certificated person who knowingly and willingly reports false fiscal expenditure data relative to the conduct of an educational program. This requirement applies only if, in the course of normal duties, the county superintendent discovers information that gives the county superintendent reasonable cause to believe that false fiscal expenditure data relative to the conduct of an educational program has been reported.

(o) If any activities authorized pursuant to this section are found to be a state reimbursable mandate pursuant to Section 6 of Article XIII B of the California Constitution, funding provided for school districts and county offices of education pursuant to Sections 2574, 2575, 42238.02, and 42238.03 shall be used to directly offset any mandated costs.

(a) At any time during a fiscal year, the county superintendent may audit the expenditures and internal controls of school districts he or she determines to be fiscally accountable, and shall conduct this audit in a timely and efficient manner. The county superintendent shall report the findings and recommendation to the governing board of the district within 45 days of completing the audit. The governing board shall, no later than 15 days after receipt of the report, notify the county superintendent of schools of its proposed actions on the county superintendent's recommendation. Upon review of the governing board report, the county superintendent, at his or her discretion, may revoke the authority for the district to be fiscally accountable pursuant to Section 42650.

(b) At any time during a fiscal year, the county superintendent may review or audit the expenditures and internal controls of any school district in his or her county if he or she has reason to believe that fraud, misappropriation of funds, or other illegal fiscal practices have occurred that merit examination. The review or audit conducted by the county superintendent shall be focused on the alleged fraud, misappropriation of funds, or other illegal fiscal practices and shall be conducted in a timely and efficient manner. The county superintendent shall report the findings and recommendations to the governing board of the school district at a regularly scheduled school district board meeting within 45 days of completing the review, audit, or examination. The governing board of the school district shall, no later than 15 calendar days after receipt of the report, notify the county superintendent of its proposed actions on the county superintendent's recommendations. Upon review of the school district governing board report, the county superintendent, at his or her discretion, and consistent with law, may disapprove an order for payment of funds consistent with Section 42638.

(c) At any time during a fiscal year, the county superintendent may review or audit the expenditures and internal controls of any charter school in his or her county if he or she has reason to believe

Section 1241.5
Audits by County Superintendent

AB 139, authority for FCMAT
extraordinary audit

Section 1241.5
Audits by County Superintendent
(continued)

that fraud, misappropriation of funds, or other illegal fiscal practices have occurred that merit examination. The review or audit conducted by the county superintendent shall be focused on the alleged fraud, misappropriation of funds, or other illegal fiscal practices and shall be conducted in a timely and efficient manner. The county superintendent shall report the findings and recommendations to the governing board of the charter school at a regularly scheduled meeting, and provide a copy of the information to the chartering authority of the charter school, within 45 days of completing the review, audit, or examination. The governing board of the charter school shall, no later than 15 calendar days after receipt of the report, notify the county superintendent and its chartering authority of its proposed response to the recommendations.

PREKINDERGARTEN PLANNING AND IMPLEMENTATION GRANT PROGRAM
Education Code

Section 8281.5
Prekindergarten Planning and
Implementation Grant Program

Automatic allocation of grant funds in
2021-22 fiscal year

(a) The California Prekindergarten Planning and Implementation Grant Program is hereby established as a state early learning initiative with the goal of expanding access to classroom-based prekindergarten programs at local educational agencies.

(b) For the 2021–22 fiscal year, the sum of three hundred million dollars (\$300,000,000) is hereby appropriated from the General Fund to the department for allocation to local educational agencies for the California Prekindergarten Planning and Implementation Grant Program pursuant to this section. These funds shall be available for encumbrance until June 30, 2024.

(c) (1) Of the total amount appropriated under subdivision (b), the Superintendent shall allocate two hundred million dollars (\$200,000,000) in the 2021–22 fiscal year to local educational agencies as follows:

(A) A minimum base grant to all local educational agencies that operate kindergarten programs as determined using California Longitudinal Pupil Achievement Data System Fall 1 kindergarten enrollment from the 2020–21 certification, as follows:

(i) For local educational agencies with an enrollment of 1 to 23 pupils, inclusive, the minimum base grant shall be twenty-five thousand dollars (\$25,000).

(ii) For local educational agencies with an enrollment of 24 to 99 pupils, inclusive, the minimum base grant shall be fifty thousand dollars (\$50,000).

(iii) For local educational agencies with an enrollment of 100 or more pupils, the minimum base grant shall be one hundred thousand dollars (\$100,000).

(B) A minimum base grant for each county office of education of fifteen thousand dollars (\$15,000) for each local educational agency in their county that operates kindergarten programs to support countywide planning and capacity building.

(C) The department may allocate or prorate any returned or collected funds pursuant to this subdivision for the purposes provided in subdivision (e).

(D) Of the remaining funds after allocations under subparagraphs (A) and (B):

(i) Sixty percent shall be available as enrollment grants. These grants shall be allocated based on the local educational agency's proportional share of total California Longitudinal Pupil Achievement Data System Fall 1 kindergarten enrollment for the 2019–20 fiscal year, as applied to the total amount of program funds available for the enrollment grant. For purposes of this clause, the total statewide kindergarten enrollment shall be calculated using the California Longitudinal Pupil Achievement Data System Fall 1 kindergarten enrollment minus the transitional kindergarten program enrollment for the 2019–20 fiscal year for each local educational agency.

(ii) Forty percent shall be available as supplemental grants. These grants shall be allocated based on the local educational agency's California Longitudinal Pupil Achievement Data System Fall 1 kindergarten enrollment minus the transitional kindergarten program enrollment for the 2019–20 fiscal year, multiplied by the local educational agency's unduplicated pupil percentage, as calculated pursuant to subdivision (b) of Section 42238.02 or subdivision (b) of Section 2574 certified as of the second principal apportionment. Funds for this purpose shall be distributed percent-to-total from funds available for the supplemental grant.

(E) Notwithstanding any other law, any kindergarten enrollment reported by a county office of education shall be attributed to the school district of geographic residence.

Return of funds

Use of funds

(2) Grant funds may be used for costs associated with creating or expanding California state preschool programs or transitional kindergarten programs, or to establish or strengthen partnerships with other providers of prekindergarten education within the local educational agency, including Head Start programs, to ensure that high-quality options for prekindergarten education are available for four-year-old children. Allowable costs include, but are not necessarily limited to, planning costs, hiring and recruitment costs, staff training and professional development, classroom materials, and supplies.

LEA grant recipient requirements

(3) Local educational agencies receiving grants pursuant to this subdivision shall do all of the following:

Reporting program data

(A) Commit to providing program data to the department, as specified by the Superintendent, including, but not limited to, recipient information and participating in overall program evaluation.

Program plan approved by June 30,
2022

(B) If the local educational agency did not develop the plan required pursuant to subparagraph (B) of paragraph (3) of subdivision (c), develop a plan for consideration by the governing board or

**Section 8281.5
Prekindergarten Planning and
Implementation Grant Program
(continued)**

body at a public meeting on or before March 30, 2023, for how all children in the attendance area of the local educational agency will have access to full-day learning programs the year before kindergarten that meet the needs of parents, including through partnerships with the local educational agency's expanding learning offerings, the After School Education and Safety Program, the California state preschool program, Head Start programs, and other community-based early learning and care programs. A plan developed pursuant to this subparagraph satisfies the requirements of subparagraph (B) of paragraph (3) of subdivision (c).

(C) Ensure expenditures are consistent with their local plan adopted pursuant to subdivision (c).

(D) Commit to planning with their county's local planning council, local tribes, and the California state preschool program and Head Start program providers in their region.

(E) Offer transitional kindergarten to all eligible pupils interested in transitional kindergarten within their attendance area by the 2025–26 school year.

(4) (A) Funds allocated or awarded pursuant to this subdivision shall be expended by June 30, 2026. The department shall then initiate collection proceedings for unexpended funds.

(B) The department may allocate or prorate any returned or collected funds pursuant to this subdivision for the purposes provided in subdivision (e).

(4) (A) Funds that are allocated or awarded pursuant to this subdivision shall be expended by June 30, 2026. The department shall then initiate collection proceedings for unexpended funds.

(B) The department shall initiate collection proceedings for grant funds used by local educational agencies in a manner inconsistent with the requirements of this section, including, but not limited to, failing to submit all required data pursuant to paragraph (3).

(d) (1) For the 2022–23 fiscal year, the sum of three hundred million dollars (\$300,000,000) is hereby appropriated from the General Fund to the department for allocation to local educational agencies for the California Prekindergarten Planning and Implementation Grant Program pursuant to this section. These funds shall be available for encumbrance until June 30, 2026. The Superintendent shall allocate funds to local educational agencies as follows:

(A) A minimum base grant to all local educational agencies that operate kindergarten programs, as determined using California Longitudinal Pupil Achievement Data System Fall 1 kindergarten enrollment from the 2021–22 certification, as follows:

(i) For local educational agencies with an enrollment of 1 to 500 pupils, inclusive, the minimum base grant shall be twenty-five thousand dollars (\$25,000).

(ii) For local educational agencies with an enrollment of 501 or more pupils, the minimum base grant shall be fifty thousand dollars (\$50,000).

(B) A minimum base grant for each county office of education of fifteen thousand dollars (\$15,000) for each local educational agency in their county that operates kindergarten programs to support countywide planning and capacity building.

(C) Of the funds remaining after the allocations pursuant to subparagraphs (A) and (B):

(i) Sixty percent shall be available as enrollment grants. These grants shall be allocated based on the local educational agency's proportional share of total California Longitudinal Pupil Achievement Data System Fall 1 kindergarten enrollment for the 2021–22 fiscal year, as applied to the total amount of program funds available for the enrollment grant. For purposes of this clause, the total statewide kindergarten enrollment shall be calculated using the California Longitudinal Pupil Achievement Data System Fall 1 kindergarten enrollment minus the transitional kindergarten program enrollment for the 2020–21 fiscal year for each local educational agency.

(ii) Forty percent shall be available as supplemental grants. These grants shall be allocated based on the local educational agency's California Longitudinal Pupil Achievement Data System Fall 1 kindergarten enrollment minus the transitional kindergarten program enrollment for the 2020–21 fiscal year, multiplied by the local educational agency's unduplicated pupil percentage, as calculated pursuant to subdivision (b) of Section 42238.02 or subdivision (b) of Section 2574, as applicable, and certified as of the second principal apportionment. Funds for this purpose shall be distributed percent-to-total from funds available for the supplemental grant.

(D) Notwithstanding any other law, any kindergarten enrollment reported by a county office of education shall be attributed to the school district of geographic residence.

(2) Grant funds may be used for costs associated with creating or expanding California state preschool programs or transitional kindergarten programs, or to establish or strengthen partnerships with other providers of prekindergarten education within the local educational agency, including Head Start programs, to ensure that high-quality options for prekindergarten education are available for children four years of age. Allowable costs shall include, but are not necessarily limited to, classroom operating costs, planning costs, hiring and recruitment costs, staff training and professional development, classroom materials, and supplies.

(3) Local educational agencies receiving grants pursuant to this subdivision shall do all of the following:

(A) Commit to providing program data to the department, as specified by the Superintendent, including, but not limited to, recipient information and participating in overall program evaluation

(B) If the local educational agency did not develop the plan required pursuant to subparagraph (B) of paragraph (3) of subdivision (c), develop a plan for consideration by the governing board or

Expenditure deadline

Return of funds

Automatic allocation of grant funds in
2022-23 fiscal year

Use of funds

LEA grant recipient requirements

Reporting program data

Program plan

Section 8281.5
Prekindergarten Planning and
Implementation Grant Program
(continued)

	<p>body at a public meeting on or before March 30, 2023, for how all children in the attendance area of the local educational agency will have access to full-day learning programs the year before kindergarten that meet the needs of parents, including through partnerships with the local educational agency's expanding learning offerings, the After School Education and Safety Program, the California state preschool program, Head Start programs, and other community-based early learning and care programs. A plan developed pursuant to this subparagraph satisfies the requirements of subparagraph (B) of paragraph (3) of subdivision (c).</p> <p>(C) Ensure expenditures are consistent with their local plan adopted pursuant to subdivision (c).</p> <p>(D) Commit to planning with their county's local planning council, local tribes, and the California state preschool program and Head Start program providers in their region</p> <p>(E) Offer transitional kindergarten to all eligible pupils interested in transitional kindergarten within their attendance area by the 2025–26 school year.</p>
Local consultation required	<p>(4) (A) Funds allocated or awarded pursuant to this subdivision shall be expended by June 30, 2026. The department shall then initiate collection proceedings for unexpended funds.</p> <p>(B) The department may allocate or prorate any returned or collected funds pursuant to this subdivision for the purposes provided in subdivision (e).</p>
Receipt of grant requires commitment to offer TK by 2025-26	<p>(5) The department shall initiate collection proceedings for grant funds used by local educational agencies in a manner inconsistent with the requirements of this section, including, but not limited to, failing to submit all required data pursuant to subparagraph (A) of paragraph (3).</p>
Expenditure deadline	<p>(e) (1) (A) Of the total amount appropriated under subdivision (b), the Superintendent shall award one hundred million dollars (\$100,000,000) in competitive grants to local educational agencies to increase the number of highly-qualified teachers available to serve California state preschool programs and transitional kindergarten pupils, and to provide California state preschool program, transitional kindergarten, and kindergarten teachers with training in providing instruction in inclusive classrooms, culturally responsive instruction, supporting dual language learners, enhancing social-emotional learning, implementing trauma-informed practices and restorative practices, and mitigating implicit biases to eliminate exclusionary discipline, pursuant to this section. These funds shall be available for encumbrance until June 30, 2024.</p> <p>(B) Any funds allocated for purposes of this subdivision pursuant to subparagraph (C) of paragraph (4) of subdivision (c) or subparagraph (B) of paragraph (4) of subdivision (d) shall be available for encumbrance through June 30, 2026. (B) The department may allocate or prorate any returned or collected funds pursuant to this subdivision for the purposes provided in subdivision (e).</p> <p>(2) The Superintendent shall develop and administer a process to award grants under paragraph (1), subject to approval of the executive director of the state board, on a competitive basis to local educational agencies. To apply for a grant, a local educational agency shall submit an application to the department describing how it will allocate funds and increase either the number of credentialed teachers meeting the requirements of subdivision (g) of Section 48000, or the competencies of California state preschool programs, transitional kindergarten, and kindergarten teachers to enhance their ability to provide instruction in inclusive classrooms, provide culturally responsive instruction, support dual language learners, enhance social-emotional learning, implement trauma-informed and restorative practices, and mitigate implicit biases to eliminate exclusionary discipline.</p> <p>(3) A local educational agency may apply on behalf of a consortium of providers within the local educational agency's program area, including California state preschool programs and Head Start programs operated by community-based organizations.</p> <p>(4) An applicant shall demonstrate all of the following to be considered for a grant award:</p> <p>(A) A need for preschool and transitional kindergarten or kindergarten professional development in a region.</p> <p>(B) A need for preschool and transitional kindergarten teachers in a region.</p> <p>(C) The presence of, or plan to create, inclusive classroom settings.</p> <p>(D) The ability to connect the preschool, transitional kindergarten, or kindergarten program to before and after school programs and extended day services.</p> <p>(E) A plan to integrate preschool, transitional kindergarten, and kindergarten professional development opportunities.</p> <p>(F) A plan for recruiting new preschool, transitional kindergarten, or kindergarten teachers with experience in early learning and care settings and collaborating with institutions of higher education to ensure a qualified prekindergarten teacher pipeline.</p> <p>(G) A plan for how principals and administrators overseeing the transitional kindergarten program, or other prekindergarten program, will receive training and professional development on the value and tenets of effective instruction for young children.</p> <p>(5) In awarding grants under paragraph (1), the Superintendent shall establish a methodology that accounts for all of the following:</p> <p>(A) The percentage of transitional kindergarten and kindergarten pupils eligible for free and reduced-price meals.</p> <p>(B) The percentage of dual language learners that the local educational agency is serving or is planning to serve in a California state preschool program or transitional kindergarten program.</p> <p>(C) The percentage of pupils with disabilities the local educational agency is serving or planning</p>
Return of funds	
Additional competitive grant funds	

- to serve in an inclusive California state preschool program or transitional kindergarten program.
- (D) The percentage of pupils served, or planned to be served, in full-day California state preschool, transitional kindergarten, or kindergarten programs offered by the local educational agency or community-based organizations.
- (E) The extent to which applicants operate in an attendance area where a significant disproportionality of particular races or ethnicities, as described in Section 1418(d) of Title 20 of the United States Code, has been identified in special education.
- (F) The extent to which the local educational agency is located in an area that has more than three young children, three to five years of age, inclusive, for every licensed childcare slot.
- (G) The extent to which applicants plan to partner with community-based California state preschool programs and Head Start programs in their program area to ensure those teachers have access to professional development along with teachers employed by the local educational agency.
- (6) Grants awarded under paragraph (1) for professional development may be used for costs associated with the educational expenses of current and future California state preschool program, transitional kindergarten, and kindergarten professionals that support their attainment of required credentials, permits, or professional development in early childhood instruction or child development, including developing competencies in serving inclusive classrooms and dual language learners. Professional development grant funds shall be used for any of the following purposes:
- (A) Tuition, supplies, and other related educational expenses.
- (B) Transportation and childcare costs incurred as a result of attending classes.
- (C) Substitute teacher pay for California state preschool program, transitional kindergarten, and kindergarten professionals that are currently working in a California state preschool program, transitional kindergarten, or kindergarten classroom.
- (D) Stipends and professional development expenses, as determined by the Superintendent.
- (E) Career, course, and professional development coaching, counseling, and navigation services.
- (F) Linked courses, cohorts, or apprenticeship models.
- (G) Training and professional development for principals and other administrators of transitional kindergarten, kindergarten, and grades 1 to 12, inclusive, on the value and tenets of effective instruction for young children.
- (H) Other educational expenses, as determined by the Superintendent.
- (7) Local educational agencies awarded funding pursuant to paragraph (1) may partner with local or online accredited institutions of higher education or local agencies that provide high-quality or credit-bearing trainings, or apprenticeship programs that integrate and embed higher education coursework with on-the-job training of professionals.
- (8) Professional learning provided pursuant to this subdivision shall, as applicable, be aligned to the preschool learning foundations and academic standards pursuant to Sections 51226, 60605, 60605.1, 60605.2, 60605.3, 60605.4, 60605.8, and 60605.11, as those sections read on June 30, 2020, and former Section 60605.85, as that section read on June 30, 2014.
- (9) Local educational agencies receiving grants under this subdivision shall commit to providing program data to the department, as specified by the Superintendent, including, but not necessarily limited to, recipient information, including demographic information, educational progress, and the type of courses taken, and participating in overall program evaluation.
- (10) The Superintendent shall provide a report to the Department of Finance and the appropriate policy and fiscal committees of the Legislature on or before October 1, 2024, on the expenditure of funds and relevant outcome data in order to evaluate the impact of the grants awarded under this subdivision.
- (11) (A) Notwithstanding any other law, on June 30, 2027, any unexpended funds of the amount awarded for purposes of this subdivision shall revert to the General Fund.
- (B) Notwithstanding subparagraph (A), any unexpended funds allocated for purposes of this subdivision pursuant to subparagraph (C) of paragraph (4) of subdivision (c) and subparagraph (B) of paragraph (4) of subdivision (d) shall revert to the General Fund on June 30, 2028.
- (f) For purposes of this section, "local educational agency" means a school district, county office of education, or charter school.
- (g) For purposes of making the computations required by Section 8 of Article XVI of the California Constitution, the appropriation made by subdivision (b) shall be deemed to be "General Fund revenues appropriated for school districts," as defined in subdivision (c) of Section 41202, for the 2020–21 fiscal year, and included within the "total allocations to school districts and community college districts from General Fund proceeds of taxes appropriated pursuant to Article XIII B," as defined in subdivision (e) of Section 41202, for the 2020–21 fiscal year.
- (h) For purposes of making the computations required by Section 8 of Article XVI of the California Constitution, the appropriation made by subdivision (d) shall be deemed to be "General Fund revenues appropriated for school districts," as defined in subdivision (c) of Section 41202, for the 2021–22 fiscal year, and included within the "total allocations to school districts and community college districts from General Fund proceeds of taxes appropriated pursuant to Article XIII B," as defined in subdivision (e) of Section 41202, for the 2021–22 fiscal year.

CHARTER SCHOOLS FACILITIES FINANCE PROGRAM
Education Code

Section 17078.52
Charter schools facilities program

(a) There is hereby established the Charter Schools Facilities Program to provide funding to qualifying entities for the purpose of establishing school facilities for charter school pupils.

(b) (1) The 2002 Charter School Facilities Account is hereby established within the 2002 State School Facilities Fund established pursuant to subdivision (b) of Section 17070.40. The proceeds of bonds, as set forth in subparagraph (A) of paragraph (1) of subdivision (a) of Section 100620, shall be deposited into the 2002 Charter School Facilities Account for the purposes of this article. Notwithstanding Section 13340 of the Government Code, funds deposited into the account are hereby continuously appropriated for the purposes of this article.

(2) The 2004 Charter School Facilities Account is hereby established within the 2004 State School Facilities Fund established pursuant to subdivision (c) of Section 17070.40. The proceeds of bonds, as set forth in subparagraph (A) of paragraph (1) of subdivision (a) of Section 100820, if approved by the voters, shall be deposited into the 2004 Charter School Facilities Account for the purposes of this article. Notwithstanding Section 13340 of the Government Code, funds deposited into the account are hereby continuously appropriated for the purposes of this article.

(3) The 2006 Charter School Facilities Account is hereby established within the 2006 State School Facilities Fund established pursuant to subdivision (d) of Section 17070.40. The proceeds of bonds, as set forth in paragraph (2) of subdivision (a) of Section 101012, if approved by the voters, shall be deposited into the 2006 Charter School Facilities Account for the purposes of this article. Notwithstanding Section 13340 of the Government Code, funds deposited into the account are hereby continuously appropriated for the purposes of this article.

(c) As used in this article, the following terms have the following meanings:

(1) "Authority" means the California School Finance Authority established pursuant to Section 17172.

(2) "Account" means the pertinent account established under subdivision (b).

(3) "Preliminary apportionment" means an apportionment made for eligible applicants under this article in advance of full compliance with all of the application requirements otherwise required for an apportionment pursuant to this chapter. The process for making preliminary apportionments under this article shall be substantially identical to the process established for critically overcrowded schools pursuant to Sections 17078.22 to 17078.30, inclusive.

(4) "Financially sound" means a charter school that has demonstrated, over a period of time determined by the authority, but not less than 24 months immediately preceding the submission of the application, that it has operated as a financially capable concern in California, as measured by criteria established by the authority. A charter school that cannot demonstrate that it has been a financially capable concern for at least 24 months immediately preceding the submission of the application, due solely to not having operated as a charter school for at least 24 months, may meet this 24-month requirement if the charter school is managed by staff who have at least 24 months of documented experience, as measured by criteria established by the authority and the charter school has an educational plan, financial resources, facilities expertise, management expertise, and has been a financially capable concern for at least 24 months, as established by the authority.

(d) The board shall, from time to time, transfer funds within the account to the California School Finance Authority Fund for the purposes of this article pursuant to the request of the authority as set forth in this article.

Section 17078.53
Initial preliminary applications

(a) The initial preliminary applications for projects to be funded pursuant to this article shall be submitted to the board by March 31, 2003. Thereafter, the board may establish subsequent application periods as needed.

(b) Preliminary applications may be submitted by eligible applicants as set forth in this article by either of the following:

(1) A school district on behalf of a charter school that is physically located within the geographical jurisdiction of the school district.

(2) A charter school on its own behalf if the charter school has notified both the superintendent and the governing board of the school district in which it is physically located of its intent to do so in writing at least 30 days prior to submission of the preliminary application.

(c) A preliminary application shall demonstrate either of the following:

(1) That a charter petition for the school for which the application is submitted has been granted by the appropriate chartering entity prior to the application deadline determined by the board.

(2) That an already existing charter has been amended to include the school for which the application is submitted and approved by the appropriate chartering entity prior to the deadline determined by the board.

(d) A preliminary application shall include either of the following:

(1) For a preliminary application submitted pursuant to paragraph (1) of subdivision (b), the number of unhoused pupils determined pursuant to Article 3 (commencing with Section 17071.75) that will be housed by the project for which the preliminary application has been submitted.

(2) For a preliminary application submitted pursuant to paragraph (2) of subdivision (b), a certification from the governing board of the district within which the charter school is physically located of the number of unhoused pupils for that district determined pursuant to Article 3

Section 17078.53
Initial preliminary applications
(continued)

(commencing with Section 17071.75) that will be housed by the project for which the preliminary application has been submitted.

(e) Prior to submitting a preliminary application, the school district and charter school shall consider existing school district facilities in accordance with Section 47614.

(f) The board, after consideration of the recommendations of the authority regarding whether a charter school is financially sound, shall approve the preliminary application and shall make the preliminary apportionment for funding pursuant to this article.

(g) (1) The board shall establish a process to ensure that pupil attendance in a charter school that is physically located within the geographical jurisdiction of a school district is counted as per-pupil eligibility for that school district and to ensure that the same per-pupil attendance is not so counted for any other school district or other applicant under this chapter.

(2) (A) Except as provided pursuant to subparagraph (B) and notwithstanding subdivision (b) of Section 17071.75, the number of pupils for which facilities are provided under this article shall not be included in the sum determined under subdivision (b) of Section 17071.75.

(B) The number of unhoused pupils determined pursuant to subdivision (d) that will be housed by the project for which a preliminary application has been submitted shall be included in the sum determined under subdivision (b) of Section 17071.75.

(h) The board shall establish a process to be used for release of funds for approved projects pursuant to this article. Notwithstanding Section 17072.30, the board may provide for the release of planning and site acquisition funds prior to the approval of the project by the Department of General Services pursuant to the Field Act, as defined in Section 17281.

(a) An eligible project under this article shall include funding, as permitted by this chapter, for new construction or rehabilitation of a school facility for charter school pupils, as set forth in this article. A project may include, but is not limited to, the cost of retrofitting an existing building for charter school purposes, purchasing a building, or retrofitting a building that has been purchased by the charter school, if those costs have not been previously funded under this chapter, but may not exceed the amounts set forth in subdivision (b). Existing school buildings made available by a school district that will be rehabilitated for the purposes of this article are not subject to Article 6 (commencing with Section 17073.10). An allocation of funds shall not be made for a school facility that is less than 15 years old.

(b) The maximum amount of the funding pursuant to this article shall be determined by calculating the charter school's per-pupil grant amount plus other allowable costs as set forth in this chapter. Funding shall be provided by the authority for new facility construction or rehabilitation as set forth in Section 17078.58.

(c) To be funded under this article, a project shall comply with all of the following:

(1) It shall meet all the requirements regarding public school construction, plan approvals, toxic substance review, site selection, and site approval, as would any noncharter school project of a school district under this chapter, including, but not limited to, regulations adopted by the State Architect pursuant to Section 17280.5 relating to the retrofitting of existing buildings, as applicable.

(2) Notwithstanding any provision of law to the contrary, including, but not limited to paragraph (1), the board, after consulting with the relevant regulatory agencies, shall, to the extent feasible, adopt regulations establishing a process for projects to be subject to a streamlined method for obtaining regulatory approvals for all requirements described in paragraph (1), except for the requirements of the Field Act as defined in Section 17281, which shall be complied with in the same manner as any other project under this chapter.

(3) The board shall fund only new construction to be physically located within the geographical jurisdiction of a school district.

(d) Facilities funded pursuant to this article shall have a 50 percent local share matching obligation that may be paid by the applicant through lease payments in lieu of the matching share, or as otherwise set forth in this article, including, but not limited to, Section 17078.58.

(e) The authority may charge its administrative costs against the respective 2002, 2004, or 2006 Charter School Facilities Account, or the amount described in paragraph (2) of subdivision (a) of Section 101122, which shall be subject to the approval of the Department of Finance and which may not exceed 2.5 percent of the account or amount.

(a) The board, in consultation with the authority, shall approve projects pursuant to this article as otherwise set forth in this chapter, and shall make preliminary apportionments only to financially sound applicants in accordance with all of the following criteria:

(1) The board shall seek to ensure that, when considered as a whole, the applications approved pursuant to this article are fairly representative of the various geographical regions of the state.

(2) The board shall seek to ensure that, when considered as a whole, the applications approved pursuant to this article are fairly representative of urban, rural, and suburban regions of the state.

(3) The board shall seek to ensure that, when considered as a whole, the applications approved pursuant to this article are fairly representative of large, medium, and small charter schools throughout the state.

Section 17078.54
New construction
or rehabilitation funding

Section 17078.56
Approval of projects;
criteria; preferences

Section 17078.56
Approval of projects;
criteria; preferences
(continued)

(4) The board shall seek to ensure that, when considered as a whole, the applications approved pursuant to this article are fairly representative of the various grade levels of pupils served by charter school applicants throughout the state.

(b) While ensuring that the requirements of subdivision (a) are met when considering all approved projects under this article as a whole, the board shall, within each factor of the criteria set forth in subdivision (a), give a preference to charter schools in overcrowded school districts, charter schools in low-income areas, charter schools operated by not-for-profit entities, and charter schools that utilize existing school district facilities.

Section 17078.57
Adoption of regulations

(a) The authority, in consultation with the board, shall adopt regulations establishing uniform terms and conditions that shall apply equally to all projects for funding in accordance with Section 17078.58, including, but not limited to, all of the following:

(1) The process for determining the manner in which the applicant will pay its local matching share, including the method for determining lease payments to be made in lieu of the local matching share. The regulations shall comply with all of the following criteria:

(A) The payment process set forth in Section 17199.4 may be used.

(B) The payment process shall permit lump-sum local matching payments and shall permit establishment of a schedule for lease payments to be made in lieu of the local matching share.

(C) The lease payment schedule shall be calculated by amortizing one-half of the total approved project costs, minus lump-sum payments, over the entire payment period as set forth in Section 17078.58.

(D) The payment schedule for payments in lieu of the local matching funds pursuant to this section shall be based upon payment, within a reasonable period of time not to exceed a 30-year period, of one-half of the total eligible project costs, and shall be calculated in a manner that is designed to result in full payment of that portion, together with interest thereon at a rate set by the authority. The interest rate shall be set using the lower of the following:

(i) The rate paid on moneys in the Pooled Money Investment Account as of the date of disbursement of the funding.

(ii) A rate equal to 50 percent of the interest rate paid by the state on the most recent sale of state general obligation bonds, and the interest rate shall be computed according to the true interest cost method.

(E) Notwithstanding subparagraph (D), the authority shall not set the interest rate on a loan at a rate lower than 2 percent. Program participants that have locked in an interest rate before January 1, 2009, may reset their payment schedule based on the interest rate set pursuant to subparagraph (D) as of January 1, 2009. Program participants executing an agreement on and after January 1, 2009, shall have their interest rate set at the time the funding agreement is executed and shall not renegotiate interest rates without prior approval of the authority.

(2) The method for determining whether a charter school is financially sound. In the case of a charter school chartered by a school district that is located outside of the school district that chartered it, the method developed by the authority shall include, but shall not be limited to, a site visit to the school facility currently being used by the charter school during hours when pupils are present and instruction is being provided.

(3) (A) Security provisions, including, but not limited to, whether title to project facilities shall be held by the school district in which the facility is to be physically located, in trust, for the benefit of the state public school system, or by another entity as authorized pursuant to Section 17078.63.

(B) The authority shall adopt a mechanism whereby a person or entity who provides a substantial contribution that is applied to the costs of the project in excess of the state share and the local matching share may be granted a security interest to be satisfied from the proceeds, if any, realized when the property is ultimately disposed of as set forth in paragraph (5) of subdivision (b) of Section 17078.62.

(4) The method for integrating funding pursuant to this article with the general procedures of the authority pursuant to subdivision (i) of Section 17180 for otherwise funding projects eligible for funding under this chapter, if appropriate.

(b) The authority may adopt, amend, or repeal rules and regulations pursuant to this chapter as emergency regulations. The adoption, amendment, or repeal of these regulations is conclusively presumed to be necessary for the immediate preservation of the public peace, health, safety, or general welfare within the meaning of Section 11346.1 of the Government Code.

Section 17078.58
Maximum funding amount;
collection of local share equivalent
in the form of lease payments

(a) Funding granted pursuant to this article may not exceed 100 percent of the total allowable project costs as determined by calculating double the per-pupil grant eligibility as set forth in Section 17072.10, and subdivision (e) of Section 17078.53, plus 100 percent of all other allowable construction project costs, as appropriate to the project, that would otherwise be available to school district projects as set forth in this chapter. Funding granted for the purposes of rehabilitating buildings under Section 17078.54 shall be limited to the costs necessary to comply with subdivision (c) of Section 17078.54, and shall not exceed the maximum costs that would otherwise be allowable for a new construction project funded under this article.

(b) The local share equivalent shall be collected in the form of lease payments or otherwise as set forth in this article.

Section 17078.58
**Maximum funding amount;
collection of local share equivalent
in the form of lease payments**
(continued)

(c) Lease payments in lieu of local share payments, and any other local share payments made pursuant to this article, shall be made to the board for deposit into the respective 2002, 2004, or 2006 Charter School Facilities Account. Funds deposited into the account pursuant to this section may be used by the board only for a purpose related to charter school facilities pursuant to this article.

(d) When a preliminary apportionment under this article is converted to a final apportionment, any funds not needed for the final apportionment shall remain in the 2002, 2004, or 2006 Charter School Facilities Account for use by the board for any purpose related to charter school facilities pursuant to this article.

(a) As a first priority, the existing charter school shall be permitted to continue to use the facility until it is no longer needed by the charter school for charter school purposes.

(b) If the charter school occupying a facility funded pursuant to this article ceases to utilize the facility for a charter school purpose, all of the following apply:

(1) If the charter school is no longer using the facility because the school district in which the charter school is located has revoked or declined to renew the charter, the school district, as a necessary component of the first priority established in subdivision (a), may not immediately occupy the facility, but shall allow a reasonable time, not to exceed six months, for completion of the review process contemplated in Section 47607 or 47607.5.

(2) As a second priority, any qualifying successor charter school shall be permitted to meet its facility needs by occupying the facility on equal terms as the prior charter school occupant, including, but not limited to, assumption of fee simple title to the facility, as described in paragraph (3) of subdivision (a) of Section 17078.63.

(3) As a third priority, the school district in which the charter school is physically located may notify the authority and take possession and take title to the facility, if the title is not already held by the district, and make the facility available for continued use as a public school facility.

(4) If the school district in which the charter school is physically located elects to take possession of a facility pursuant to paragraph (3), it shall pay the balance of the unpaid local matching share or demonstrate that it is willing and able to continue to make the lease payments in lieu of the local matching share on the same terms. However, the payments shall be reduced or eliminated, as appropriate, if the school district complies with all of the following:

(A) It demonstrates that it would have been eligible for hardship funding under Article 8 (commencing with Section 17075.10) at the time that the application for funding the facility under this article was originally submitted.

(B) It certifies to the board that it will utilize the facilities for public school purposes for a period of at least five years from the date that it occupies the facility.

(5) (A) If the school district declines to take possession pursuant to paragraph (3), or if the facility is subsequently no longer needed for public school purposes, the school district shall dispose of the facilities in a manner otherwise applicable to the disposal of surplus public schoolsites. Any unpaid local matching share shall be paid from the net proceeds, if any, of the disposition and shall be deposited into the respective 2002, 2004, or 2006 Charter School Facilities Account. To the extent that funds remain from the proceeds of the disposition after repayment of the local matching share, any security interest granted to a person or entity pursuant to subparagraph (B) of paragraph (3) of subdivision (a) of Section 17078.57 shall be satisfied. Funds remaining from the proceeds after any security interest has been satisfied shall be paid to the school district in which the facility is located to be used for capital improvements in the school district.

(B) If title to the facility is held by a charter school or a local governmental entity other than the school district, and the school district declines to dispose of the facility, the board shall dispose of the facility in accordance with the provisions that would otherwise apply to the disposal of surplus school property by the school district, including, but not limited to, Chapter 4 (commencing with Section 17385) of Part 10.5. The proceeds of the disposition shall be distributed in accordance with subparagraph (A).

(6) If the lease payments in lieu of the local matching share are fully paid, the school district shall continue to hold title to the facility, in trust, for the benefit of the state public school system. The school district shall permit continued use of the facility for charter school purposes as long as the facility is needed for those purposes.

Section 17078.62
**Continued use of facility; effect of
ceasing to use facility for charter
school purposes**

(a) Prior to the release of funds for an application submitted pursuant to paragraph (2) of subdivision (b) of Section 17078.53 for site acquisition or new construction final apportionments, applicants shall provide one of the following:

(1) Documentary evidence that the school district in which the facility is to be physically located holds title to the project facilities in trust for the benefit of the state public school system.

(2) Documentary evidence that a local governmental entity, including, but not limited to, a county board of education, a city, a county, or a city and county, holds title to the project facilities in trust for the benefit of the state public school system, subject to both of the following conditions:

(A) Consistent with the prohibition in Section 6 of Article IX of the California Constitution regarding governance of public schools, a city, county, city and county, or other local governmental entity not included within the public school system that holds title pursuant to this paragraph shall not

Section 17078.63
Documentary evidence; title

Section 17078.63
Documentary evidence; title
(continued)

exercise any control over the operation of the charter school.

(B) The following shall be recorded in the chain of title for the property:

(i) A restrictive covenant specifying that the facility shall be used only for public school purposes as authorized in the California Constitution and statute.

(ii) A remainder interest to the school district in which the facility is physically located or, if the school district disclaims the interest to the facility, to the board. The remainder interest shall be triggered when the facility is no longer needed for charter school purposes and shall then be subject to paragraphs (2) to (6), inclusive, of subdivision (b) of Section 17078.62.

(3) (A) A request that the charter school be authorized to hold fee simple title to the subject property in trust for the benefit of the state public school system, on which a lien shall be recorded in favor of the board for the total amount of funds allocated pursuant to this article, including any loan received in lieu of a local matching share pursuant to Section 17078.57. The charter school shall include with the request a statement outlining the reasons why ownership of the project facilities is not vested with an entity set forth in paragraph (1) or (2). Prior to releasing any project funds, the board shall make findings that the applicant has submitted all of the information required by this paragraph.

(B) The following shall be recorded in the chain of title for the property:

(i) A restrictive covenant specifying that the facility shall be used only for public school purposes as authorized in the California Constitution and statute.

(ii) A remainder interest to the school district in which the facility is physically located or, if the school district disclaims the interest to the facility, to the board. The remainder interest shall be triggered when the facility is no longer needed for charter school purposes and shall then be subject to paragraphs (2) to (6), inclusive, of subdivision (b) of Section 17078.62.

(b) A charter school may request a school district to transfer title to project facilities to an entity authorized by paragraph (2) or (3) of subdivision (a) if the school district entered into an agreement, prior to January 1, 2010, to hold title to those facilities. A school district that receives a request pursuant to this subdivision may transfer the title to the entity designated in the request pursuant to terms and conditions mutually agreed upon by the district and the charter school.

(c) The board may adopt regulations to implement this section.

Section 17078.64
School district
may fund charter facilities

(a) In lieu of applying for funding under this article, a school district may elect to include facilities for a charter school that would be physically located within its geographical jurisdiction within its application for funding pursuant to the general provisions of this chapter, other than this article. However, the project would be outside the scope of this article, would not be subject to its provisions, and shall comply with this chapter in the same manner as any noncharter project. Any per-pupil eligibility that is used for that project shall not, also, support any project under this article.

(b) Except for those provisions in which the authority is expressly required or authorized to adopt regulations pursuant to this article, the board in consultation with the authority shall adopt regulations to implement this article. The board may adopt, amend, or repeal rules and regulations pursuant to this article as emergency regulations. Until July 1, 2004, the adoption, amendment, or repeal of these regulations is conclusively presumed to be necessary for the immediate preservation of the public peace, health, safety, or general welfare within the meaning of Section 11346.1 of the Government Code.

(c) This article is not applicable to projects funded with the proceeds of state general obligation bonds approved by the voters prior to January 1, 2002.

COVID-19 EMERGENCY APPROPRIATIONS
Education Code

Section 32525
Learning Recovery Emergency Fund

(a) The Learning Recovery Emergency Fund is hereby created in the State Treasury for the purpose of receiving appropriations for school districts, county offices of education, charter schools, and community college districts related to the state of emergency declared by the Governor on March 4, 2020, relating to the COVID-19 pandemic.

(b) Notwithstanding Section 41207.5, moneys transferred to the Learning Recovery Emergency Fund pursuant to Section 32526 that would otherwise revert to the Proposition 98 Reversion Account shall instead remain in the Learning Recovery Emergency Fund for future reallocation to school districts, county offices of education, and charter schools consistent with the intent of Section 32526.

Section 32526
Learning Recovery Emergency
Block Grant
Automatic allocation of grant funds

(a) (1) For the 2022–23 fiscal year, the sum of six billion three hundred forty-five million four hundred five thousand dollars (\$6,345,405,000) is hereby appropriated from the General Fund to the department for transfer to the Learning Recovery Emergency Fund created in Section 32525. The Superintendent shall allocate available moneys in the Learning Recovery Emergency Fund deposited pursuant to this section to local educational agencies in the manner, and for the purposes, set forth in this section. This allocation shall be known as the Learning Recovery Emergency Block Grant.

(2) For purposes of this section, “local educational agency” means a school district, county office of education, or charter school.

(3) The department may collect, from a local educational agency’s principal apportionment monthly payment pursuant to Section 14041, the difference between the local educational agency’s allocation for the Learning Recovery Emergency Block Grant pursuant to this section, as amended by Assembly Bill 185 of the 2021–22 Regular Session, and the revised allocation pursuant to this section, as amended by Senate Bill 114 of the 2023–24 Regular Session. The department shall report any uncollectible amounts to the Department of Finance and the Legislature by January 31, 2024.

(b) Funds described in subdivision (a) shall be allocated on a per-unit basis of the local educational agency’s 2021–22 fiscal year second period reported kindergarten and grades 1 to 12, inclusive, average daily attendance multiplied by the local educational agency’s 2021–22 unduplicated pupil percentage calculated pursuant to Section 2574 or 42238.02, as applicable. Prior fiscal year average daily attendance and unduplicated pupil percentage shall be considered final as of the second principal apportionment for that fiscal year.

(c) (1) The governing board or body of a local educational agency may expend the one-time funds received pursuant to this section to establish learning recovery initiatives through the 2027–28 school year that, at a minimum, support academic learning recovery and staff and pupil social and emotional well-being.

Use of funds

(2) Specifically, funds received under subdivision (b) shall only be expended for any of the following purposes:

(A) Instructional learning time for the 2022–23 through 2027–28 school years by increasing the number of instructional days or minutes provided during the school year, providing summer school or intersessional instructional programs, or taking any other action that increases or stabilizes the amount of instructional time or services provided to pupils, or decreases or stabilizes staff-to-pupil ratios, based on pupil learning needs.

(B) Accelerating progress to close learning gaps through the implementation, expansion, or enhancement of learning supports, such as:

(i) Tutoring or other one-on-one or small group learning supports provided by certificated or classified staff.

(ii) Learning recovery programs and materials designed to accelerate pupil academic proficiency or English language proficiency, or both.

(iii) Providing early intervention and literacy programs for pupils in preschool to grade 3, inclusive, including, but not limited to, school library access.

(iv) Supporting expanded learning opportunity program services pursuant to Section 46120.

(v) Providing instruction and services consistent with the California Community Schools Partnership Act (Chapter 6 (commencing with Section 8900) of Part 6) regardless of grantee status.

(C) Integrating pupil supports to address other barriers to learning, and staff supports and training, such as the provision of health, counseling, or mental health services, access to school meal programs, before and after school programs, or programs to address pupil trauma and social-emotional learning, or referrals for support for family or pupil needs.

(D) Access to instruction for credit-deficient pupils to complete graduation or grade promotion requirements and to increase or improve pupils’ college eligibility.

(E) Additional academic services for pupils, such as diagnostic, progress monitoring, and benchmark assessments of pupil learning.

(d) (1) Local educational agencies receiving apportionments pursuant to this section shall report to the department, using the template developed by the department, and make publicly available on their internet websites, interim expenditures of those apportioned funds to the department by December 15, 2024, and annually thereafter, concluding with the submission of a final report on expenditures no later than December 15, 2029. Local educational agencies that do not submit the final expenditure report shall forfeit all funds apportioned pursuant to this section.

Reports due on December 1, 2024, 2027, and 2029

(2) If a charter school ceases to operate before December 15, 2029, a final expenditure report shall be due to the department within 60 days of the effective date of closure and the department shall collect any unspent amounts.

(3) (A) The department, on or before June 30, 2023, shall develop an expenditure report template for use by local educational agencies in fulfilling the requirements of paragraph (1).

(B) The template shall require the inclusion of the total expenditures, by fiscal year, for each allowable use pursuant to paragraph (2) of subdivision (c), disaggregated by each allowable use specified in subparagraphs (A) to (E), inclusive, of paragraph (2) of subdivision (c).

(C) The template shall, to the greatest extent practicable, use language that is understandable and accessible to parents.

(e) (1) For purposes of making the computations required by Section 8 of Article XVI of the California Constitution, five billion six hundred twenty-five million six hundred forty-eight thousand dollars (\$5,625,648,000) of the appropriation made by paragraph (1) of subdivision (a) shall be deemed to be “General Fund revenues appropriated for school districts,” as defined in subdivision (c) of Section 41202, for the 2021–22 fiscal year, and included within the “total allocations to school districts and community college districts from General Fund proceeds of taxes appropriated

Section 32526
Learning Recovery Emergency
Block Grant
(continued)

pursuant to Article XIII B," as defined in subdivision (e) of Section 41202, for the 2021–22 fiscal year.
(2) For purposes of making the computations required by Section 8 of Article XVI of the California Constitution, seven hundred nineteen million seven hundred fifty-seven thousand dollars (\$719,757,000) of the appropriation made by paragraph (1) of subdivision (a) shall be deemed to be "General Fund revenues appropriated for school districts," as defined in subdivision (c) of Section 41202, for the 2022–23 fiscal year, and included within the "total allocations to school districts and community college districts from General Fund proceeds of taxes appropriated pursuant to Article XIII B," as defined in subdivision (e) of Section 41202, for the 2022–23 fiscal year.
(f) It is the intent of the Legislature to allocate three hundred seventy-eight million six hundred fifty thousand dollars (\$378,650,000) per year from the 2025–26 fiscal year to 2027–28 fiscal year, inclusive, to the department for transfer to the Learning Recovery Emergency Fund created pursuant to Section 32525.

(2) For purposes of making the computations required by Section 8 of Article XVI of the California Constitution, one billion four hundred thirty-six million dollars (\$1,436,000,000) of the appropriation made by paragraph (1) of subdivision (a) shall be deemed to be "General Fund revenues appropriated for school districts," as defined in subdivision (c) of Section 41202, for the 2022–23 fiscal year, and included within the "total allocations to school districts and community college districts from General Fund proceeds of taxes appropriated pursuant to Article XIII B," as defined in subdivision (e) of Section 41202, for the 2022–23 fiscal year.

REVOLVING LOAN FUND
Education Code

Section 41365
Borrowing

(a) The Charter School Revolving Loan Fund is hereby created in the State Treasury. The Charter School Revolving Loan Fund shall be composed of federal funds obtained by the state for charter schools and any other funds appropriated or transferred to the fund through the annual budget process. Funds appropriated to the Charter School Revolving Loan Fund shall remain available for purposes of the fund until reappropriated or reverted by the Legislature through the annual Budget Act or any other act.

(b) Commencing with the 2013-14 fiscal year, the administration of the Charter School Revolving Loan Fund shall be transferred to the California School Finance Authority.

Maximum loan \$250,000

(c) Loans may be made from moneys in the Charter School Revolving Loan Fund to a chartering authority for charter schools that are not a conversion of an existing school, or directly to a charter school that qualifies to receive funding pursuant to Chapter 6 (commencing with Section 47630) of Part 26.8 of Division 4 that is not a conversion of an existing school, upon application of a chartering authority or charter school and approval by the California School Finance Authority. Money loaned to a chartering authority for a charter school, or to a charter school, pursuant to this section shall be used only to meet the purposes of the charter granted pursuant to Section 47605. The loan to a chartering authority for a charter school, or to a charter school, pursuant to this subdivision shall not exceed two hundred fifty thousand dollars (\$250,000) over the lifetime of the charter school. A charter school may receive money obtained from multiple loans made directly to the charter school or to the school's chartering authority from the Charter School Revolving Loan Fund, as long as the total amount received from the fund over the lifetime of the charter school does not exceed two hundred fifty thousand dollars (\$250,000). This subdivision does not apply to a charter school that obtains renewal of a charter pursuant to Section 47607.

Factors considered

(d) The California School Finance Authority may consider all of the following when making a determination as to the approval of a charter school's loan application:

(1) Soundness of the financial business plans of the applicant charter school.

(2) Availability of the charter school of other sources of funding.

(3) Geographic distribution of loans made from the Charter School Revolving Loan Fund.

(4) The impact that receipt of funds received pursuant to this section will have on the charter school's receipt of other private and public financing.

(5) Plans for creative uses of the funds received pursuant to this section, such as loan guarantees or other types of credit enhancements.

(6) The financial needs of the charter school.

(e) Priority for loans from the Charter School Revolving Loan Fund shall be given to new charter schools for startup costs.

Repayment within five years

(f) Commencing with the first fiscal year following the fiscal year the charter school receives the loan, the Controller shall deduct from apportionments made to the chartering authority or charter school, as appropriate, an amount equal to the annual repayment of the amount loaned to the chartering authority or charter school for the charter school under this section and pay the same amount into the Charter School Revolving Loan Fund in the State Treasury. Repayment of the full amount loaned to the chartering authority or charter school shall be deducted by the Controller in equal annual amounts over a number of years agreed upon between the loan recipient and the state agency authorized to administer the Charter School Revolving Loan Fund and the Charter School Security Fund, not to exceed five years for any loan.

g) (1) Notwithstanding any other law, a loan may be made directly to a charter school pursuant to this section only in the case of a charter school that is incorporated.

(2) Notwithstanding any other law, in the case of default of a loan made directly to a charter school pursuant to this section, the charter school shall be solely liable for repayment of the loan.

(h) The California School Finance Authority may adopt any necessary rules and regulations for the implementation of this section and Sections 41366.6 and 41367. Any regulations adopted pursuant to this section may be adopted as emergency regulations in accordance with the Administrative Procedure Act (Chapter 3.5 (commencing with Section 11340) of Part 1 of Division 3 of Title 2 of the Government Code). The adoption of these regulations shall be deemed to be an emergency and necessary for the immediate preservation of public peace, health and safety, or general welfare.

(a) Moneys in the Charter School Revolving Loan Fund shall be loaned at the interest rate earned by the money in the Pooled Money Investment Account as of the date of disbursement of the funds to the charter school.

(b) A charter school shall pay the interest on any loan from the fund in regular installments withdrawn from the annual apportionment the charter school receives.

(c) All interest payments shall be paid into the Charter School Security Fund established pursuant to Section 41367.

(a) The California School Finance Authority shall monitor the adequacy of the amount of funds in the Charter School Revolving Loan Fund and report annually to the Department of Finance and the Controller on the need, if any, to transfer funds from the Charter School Security Fund to the Charter School Revolving Loan Fund for the sole purpose of replacing funds lost in the Charter School Revolving Loan Fund due to loan defaults. Before requesting any transfer of funds from the Charter School Security Fund, the California School Finance Authority shall make all reasonable efforts to recover funds directly from the defaulting loan recipient. To the extent that the California School Finance Authority determines that a transfer from the Charter School Security Fund to the Charter School Revolving Loan Fund is necessary, the California School Finance Authority shall obtain approval from the Director of Finance before a transfer of funds is made. Not sooner than 30 days after notification in writing to the Chairperson of the Joint Legislative Budget Committee, the Director of Finance shall direct the Controller to transfer the appropriate amount of funds.

(b) By October 1 of each year, the California School Finance Authority shall provide detailed fund condition information for the Charter School Revolving Loan Fund and the Charter School Security Fund to the Department of Finance and the Legislative Analyst's Office. At a minimum, this information shall contain an accounting of actual beginning balances, revenues, itemized expenditures, and ending balances for the prior year, as well as projected beginning balances, revenues, itemized expenditures, and ending balances for the current year and budget year.

The Director of Finance shall monitor the adequacy of the amount of funds in the Charter School Security Fund and report annually to the Legislature on the need, if any, to adjust the interest rate set forth in Section 41366.5 or to revise any other aspect of the default recovery plan.

(a) The Charter School Security Fund is hereby created in the State Treasury.

(b) Moneys in the fund shall be available for deposit into the Charter School Revolving Loan Fund in case of default on any loan made from the Charter School Revolving Loan Fund.

(c) Commencing with the 2013-14 fiscal year, the administration of the Charter School Security Fund shall be transferred to the California School Finance Authority.

EXPENDITURE OF FUNDS

Education Code

(a) The governing board of a school district, the governing body of a charter school, and a county board of education shall, except as may otherwise be specifically provided by law, use all money apportioned to the school district, charter school, or county office of education from the State School Fund during any fiscal year exclusively for the support of the school or schools of the school district, charter school, or county office of education for that year.

(b) School districts, charter schools, and county offices of education shall not expend funds provided in satisfaction of the state's minimum funding obligation to school districts and community college districts pursuant to Section 8 of Article XVI of the California Constitution for courses or instruction offered by private or public colleges or universities beyond that permitted in pursuit of a high school diploma, except for courses or instruction in which pupils are enrolled in before July 1, 2020.

FUNDING IN EMERGENCY CONDITIONS: CURTAILED OPERATIONS (J-13A)

Education Code

(a) A school district, county office of education, or charter school that is prevented from maintaining its schools during a fiscal year for at least 180 days for a school district or county office

Section 41365

Borrowing

(continued)

Charter school solely liable

Section 41366.5

Interest rate and payments

Section 41366.6

Transfer of funds

Section 41366.7

Adjustment of interest rate

Section 41367

Security fund

Section 41370

Use of funds in fiscal year

College-level instruction

Section 41422

Curtailed operations

Section 41422
Curtailed operations

(continued)

of education or 175 days for a charter school, or is required to operate sessions of shorter length than otherwise prescribed by law because of fire, flood, earthquake, or epidemic, or because of any order of any military officer of the United States or of the state to meet an emergency created by war, or of any civil officer of the United States, of the state, or of any county, city and county, or city authorized to issue that order to meet an emergency created by war, or because of other extraordinary conditions, or because of inability to secure or hold a teacher, or because of the illness of the teacher, which fact shall be shown to the satisfaction of the Superintendent by the affidavits of the members of the governing board of the school district, the governing board of the county office of education, or the governing board or body of the charter school and of the county superintendent of schools, shall receive the same apportionment from the State School Fund as it would have received had it not been so prevented from maintaining school for at least 180 full-length days for a school district or county office of education or 175 full-length days for a charter school.

(b) This section shall also apply to school districts, county offices of education, or charter schools that, in the absence of one or more of the conditions prescribed by this section, would have qualified for funds pursuant to Sections 46200 to 46208, inclusive, or Section 47612.5, as applicable.

(c) (1) Notwithstanding the inability to secure or hold a teacher, or because of the illness of the teacher pursuant to subdivision (a), from September 1, 2021, to June 30, 2022, inclusive, with the exception of a school closure for a schoolsite or class that only serves pupils who are individuals with exceptional needs, as defined in Section 56026, whose individualized education program developed pursuant to Article 3 (commencing with Section 56340) of Chapter 4 of Part 30 of Division 4 does not specifically provide for participation in independent study or pupils who are enrolled in community day schools pursuant to Article 3 (commencing with Section 48660) of Chapter 4 of Part 27 of Division 4, a school district, county office of education, or charter school shall not receive the same apportionment from the State School Fund pursuant to this section as it would have received had it not been so prevented from maintaining school for at least 180 full-length days for a school district or county office of education or 175 full-length days for a charter school if the school closure was due to impacts from COVID-19.

Offering independent study
to all eligible pupils

(2) (A) Notwithstanding paragraph (1), a school district, county office of education, or charter school may still receive credit for instructional days and minutes that were scheduled for in-person instruction, as demonstrated by the governing board or body approved calendar in place before the event, on days in which the school district, county office of education, or charter school was prevented from maintaining school due to the conditions indicated in paragraph (1) provided that instruction was offered to all eligible pupils through independent study pursuant to Article 5.5 (commencing with Section 51745) of Chapter 5 of Part 28 of Division 4 and implementing regulations adopted thereunder.

(B) The superintendent of a school district, the county superintendent of schools, or the administrator of a charter school shall certify to the Superintendent to offering all eligible pupils instruction through independent study pursuant subparagraph (A).

Staffing shortages due to COVID-19

(3) Notwithstanding paragraph (1), from September 1, 2021, to June 30, 2022, inclusive, a school district, county office of education, or charter school may receive the same apportionment from the State School Fund pursuant to this section for school closures related to impacts from COVID-19 due to COVID-19 related staffing shortages if the following conditions are established to the satisfaction of the Superintendent by affidavits of the members of the governing board or body of the school district, county office of education, or charter school and the county superintendent of schools:

(A) The school district, county office of education, or charter school is unable to provide in-person instruction to pupils due to staffing shortages as a result of staff quarantine due to exposure to, or infection with, COVID-19 pursuant to local or state public health guidance.

(B) For certificated staff shortages, the school district, county office of education, or charter school has exhausted all options for obtaining staff coverage, including using all certificated staff and substitute teacher options, and has consulted with their county office of education and the Superintendent in determining that staffing needs cannot be met through any option.

(C) For classified staff shortages, the school district, county office of education, or charter school has exhausted all options for obtaining staff coverage, including using all staff options, and has consulted with their county office of education and the Superintendent in determining that staffing needs cannot be met through any option.

EDUCATOR EFFECTIVENESS BLOCK GRANT
Education Code

Section 41480
Educator effectiveness block grant

(a) (1) The sum of one billion five hundred million dollars (\$1,500,000,000) is hereby appropriated from the General Fund to the Superintendent for the Educator Effectiveness Block Grant. The Superintendent shall apportion these funds to school districts, county offices of education, charter schools, and the state special schools in an equal amount per full-time equivalent certificated staff, which shall not exceed the total certificated staff count, and full-time equivalent classified staff

Section 41480
Educator effectiveness block grant

(continued)

Automatic allocation based on FTE
certificated staff

count, for each eligible local educational agency, in the 2020–21 fiscal year. The Superintendent shall make the calculations pursuant to this section using the data submitted through the California Longitudinal Pupil Achievement Data System and classified staff data submitted through the California Basic Educational Data System as of October 2020.

(2) A school district, county office of education, charter school, or state special school may expend the funds received pursuant to this subdivision from the 2021–22 fiscal year to the 2025–26 fiscal year, inclusive. School districts, county offices of education, charter schools, and state special schools shall coordinate the use of any federal funds received under Title II of the federal Every Student Succeeds Act of 2015 (Public Law 114–95) to support teachers and administrators with the expenditure of funds received pursuant to this subdivision.

(3) It is the intent of the Legislature that the Educator Effectiveness Block Grant support increased educator access to standards-aligned professional support for high-need areas of instruction, including, but not limited to, English language instruction, inclusive special education, early childhood education, and science, technology, engineering, and mathematics (STEM) instruction, including, but not limited to, computer science.

(b) A school district, county office of education, charter school, or state special school shall expend funds apportioned pursuant to this section to provide professional learning for teachers, administrators, paraprofessionals who work with pupils, and classified staff that interact with pupils, with a focus on any of the following areas:

(1) Coaching and mentoring of staff serving in an instructional setting and beginning teacher or administrator induction, including, but not limited to, coaching and mentoring solutions that address a local need for teachers that can serve all pupil populations with a focus on retaining teachers, and offering structured feedback and coaching systems organized around social-emotional learning, including, but not limited to, promoting teacher self-awareness, self-management, social awareness, relationships, and responsible decisionmaking skills, improving teacher attitudes and beliefs about one’s self and others, and supporting learning communities for educators to engage in a meaningful classroom teaching experience.

(2) Programs that lead to effective, standards-aligned instruction and improve instruction in literacy across all subject areas, including English language arts, history-social science, science, technology, engineering, mathematics, computer science, and preschool learning foundations. This may include coursework that would allow existing staff to become credentialed, fully credentialed for their assignment, or meet the requirements of subdivision (g) of Section 48000.

(3) Practices and strategies that reengage pupils and lead to accelerated learning.

(4) Strategies to implement social-emotional learning, trauma-informed practices, suicide prevention, access to mental health services, and other approaches that improve pupil well-being.

(5) Practices to create a positive school climate, including, but not limited to, restorative justice, training around implicit bias, providing positive behavioral supports, multitiered systems of support, transforming a school’s culture to one that values diverse cultural and ethnic backgrounds, and preventing discrimination, harassment, bullying, and intimidation based on actual or perceived characteristics, including disability, gender, gender identity, gender expression, language, nationality, race or ethnicity, religion, or sexual orientation.

(6) Strategies to improve inclusive practices, including, but not limited to, universal design for learning, best practices for early identification, and development of individualized education programs for individuals with exceptional needs.

(7) Instruction and education to support implementing effective language acquisition programs for English learners, which may include integrated language development within and across content areas, and building and strengthening capacity to increase bilingual and biliterate proficiency.

(8) New professional learning networks for educators not already engaged in an education-related professional learning network to support the requirements of subdivision (c).

(9) Instruction, education, and strategies to incorporate ethnic studies curricula adopted pursuant to Section 51226.7 into pupil instruction for grades 7 to 12, inclusive.

(10) Instruction, education, and strategies for certificated and classified educators in early childhood education, or childhood development.

(11) (A) Strategies to improve beginning teacher retention and support through teacher induction programs, including mentor training, stipends for mentor teachers, beginning teacher induction program costs following initial preparation, the examination or assessment fee for one administration of the reading instruction competence assessment or a teaching performance assessment, training mentors to support candidates in completing a performance assessment or reading instruction competence assessment, or contracting with commission-approved preliminary teacher preparation programs to provide mentoring support for the completion of required assessments.

(B) Funding apportioned pursuant to this section that is used to improve beginning teacher retention and support through teacher induction programs consistent with subparagraph (A), shall supplement and not supplant funding already provided by grant recipients for similar purposes.

Use of funds

Section 41480
Educator effectiveness block grant

(continued)

Allowable expenditures

(c) To ensure professional development meets educator and pupil needs, local educational agencies are encouraged to allow schoolsite and content staff to identify the topic or topics of professional learning. Reasonably related costs of providing and attending professional learning, including, but not limited to, travel, per diem reimbursement, and substitute costs, are allowable expenditures of funds apportioned pursuant to this section. Professional learning provided pursuant to this section shall do both of the following:

(1) Be content focused, incorporate active learning, support collaboration, use models of effective practice, provide coaching and expert support, offer feedback and reflection, and be of sustained duration.

(2) As applicable, be aligned to the academic content standards adopted pursuant to Sections 51226, 60605, 60605.1, 60605.2, 60605.3, 60605.4, 60605.8, and 60605.11, and the model curriculum adopted pursuant to Section 51226.7, as those sections read on June 30, 2020, and former Section 60605.85, as that section read on June 30, 2014.

(d) As a condition of receiving funds apportioned pursuant to this section, a school district, county office of education, charter school, or state special school shall do all of the following:

(1) On or before March 31, 2023, develop and adopt a plan delineating the expenditure of funds apportioned pursuant to this section, including the professional development of teachers, administrators, paraprofessionals, and classified staff. The plan shall be presented in a public meeting of the governing board of the school district, county board of education, or governing body of the charter school, before its adoption in a subsequent public meeting.

(2) On or before September 30, 2023, and again on or before September 30, 2026, report detailed expenditure information to the department, including, but not limited to, specific purchases made and the number of teachers, administrators, paraprofessional educators, or classified staff that received professional development. The department shall determine the format for this report.

(3) Ensure that none of their local educational agency employees are charged a fee for services allowable under this section, including, but not limited to, beginning teacher induction program costs, during the grant period pursuant to this section.

(e) The department shall summarize the information reported pursuant to subdivision (d) and shall submit the summary to the appropriate budget subcommittees and policy committees of the Legislature and to the Department of Finance on or before January 1, 2024, and again on or before November 30, 2026. The department shall determine the format for this report to optimize its production within existing resources, but shall include aggregated information on planned uses of the funds by allowable use and subject area. The report shall be submitted in compliance with Section 9795 of the Government Code.

(f) Funding apportioned pursuant to this section is subject to the annual audits required by Section 41020.

(g) For purposes of making the computations required by Section 8 of Article XVI of the California Constitution, the appropriation made by subdivision (a) shall be deemed to be "General Fund revenues appropriated for school districts," as defined in subdivision (c) of Section 41202, for the 2020–21 fiscal year, and included within the "total allocations to school districts and community college districts from General Fund proceeds of taxes appropriated pursuant to Article XIII B," as defined in subdivision (e) of Section 41202, for the 2020–21 fiscal year.

A-G COMPLETION IMPROVEMENT GRANT PROGRAM
Education Code

Section 41590
Establishment of A-G Completion
Improvement Grant Program

A-G Access Grant:
automatic allocation based
on unduplicated pupils

(a) For the 2021–22 fiscal year, the sum of five hundred forty-seven million five hundred thirteen thousand dollars (\$547,513,000) is hereby appropriated from the General Fund to the Superintendent for allocation for the A–G Completion Improvement Grant Program in the manner and for the purpose set forth in this section.

(b) The A–G Completion Improvement Grant Program is hereby established for the purpose of providing additional supports to local educational agencies to help increase the number of California high school pupils, particularly unduplicated pupils, who graduate from high school with A–G eligibility.

(c) (1) (A) For the 2021–22 fiscal year, the Superintendent shall allocate three hundred million dollars (\$300,000,000) of the sum appropriated pursuant to subdivision (a), in an equal amount for every unduplicated pupil enrolled in grades 9 to 12, inclusive, as reported in the California Longitudinal Pupil Achievement Data System for the 2020–21 fiscal year Fall 1 Submission to each local educational agency that is identified by the department pursuant to subdivision (h) as having an overall A–G completion rate of less than 67 percent. A local educational agency that is otherwise eligible and is receiving concentration grant funding as of the second principal apportionment certification for the 2020–21 fiscal year shall receive a total allocation under this paragraph of not less than seventy-five thousand dollars (\$75,000). These funds are available for expenditure or encumbrance through the 2025–26 fiscal year.

(B) The allocation under this paragraph shall be known as an A–G Access Grant.

Section 41590
Establishment of A-G Completion
Improvement Grant Program
(continued)

(2) (A) For the 2021–22 fiscal year, the Superintendent shall allocate one hundred million dollars (\$100,000,000) of the sum appropriated pursuant to subdivision (a), in an equal amount for every unduplicated pupil enrolled in grades 9 to 12, inclusive, as reported in the California Longitudinal Pupil Achievement Data System for the 2020–21 fiscal year Fall 1 Submission to each local educational agency that is identified by the department pursuant to subdivision (h) as having an overall A–G completion rate of 67 percent or higher. A local educational agency that is otherwise eligible and is receiving concentration grant funding as of the second principal apportionment certification for the 2020–21 fiscal year shall receive a total allocation under this paragraph of not less than seventy-five thousand dollars (\$75,000). These funds are available for expenditure or encumbrance through the 2025–26 fiscal year.

(B) The allocation under this paragraph shall be known as an A–G Success Grant.

(d) (1) A–G Access Grants and A–G Success Grants shall be used for activities that directly support pupil access to, and successful completion of, the A–G course requirements. Eligible activities may include, but are not limited to, any of the following:

(A) Providing teachers, administrators, and counselors with professional development opportunities to improve the local educational agency's A–G completion rate.

(B) Developing comprehensive advising plans and pupil supports, including tutoring programs, to improve the local educational agency's A–G completion rate.

(C) Expanding access to coursework or other opportunities to satisfy A–G course requirements to all pupils, including, but not necessarily limited to, unduplicated pupils. These opportunities may include, but shall not be limited to, course development, course review, incorporating A–G course requirements into the local educational agency's graduation requirements, and new or expanded partnerships with other secondary or postsecondary educational institutions.

(D) Advanced Placement and International Baccalaureate fees for unduplicated pupils.

(2) The Legislature encourages local educational agencies to direct A–G Success Grant funds towards pupils in danger of not achieving a grade of "C" or better in A–G courses.

(e) (1) (A) For the 2021–22 fiscal year, the Superintendent shall allocate one hundred forty-seven million five hundred thirteen thousand dollars (\$147,513,000) of the sum appropriated pursuant to subdivision (a), in an equal amount for every unduplicated pupil enrolled in grades 9 to 12, inclusive, as reported in the California Longitudinal Pupil Achievement Data System for the 2020–21 fiscal year Fall 1 Submission to each local educational agency. A local educational agency that is otherwise eligible and is receiving concentration grant funding as of the second principal apportionment certification for the 2020–21 fiscal year shall receive a total allocation under this paragraph of not less than seventy-five thousand dollars (\$75,000). These funds are available for expenditure or encumbrance through the 2025–26 fiscal year.

(B) The allocation under this subdivision shall be known as an A–G Learning Loss Mitigation Grant.

(2) (A) (i) A–G Learning Loss Mitigation Grants shall be used to allow pupils who receive a grade of "D," "F," or "Fail" in an A–G approved course in the spring semester of 2020 or the 2020–21 school year to retake those A–G courses.

(ii) The method of offering pupils the opportunity to retake courses provided in clause (i) shall be determined by the local educational agency.

(B) If sufficient funds are available after implementing subparagraph (A), a local educational agency may also use grant funds to offer credit recovery opportunities to all pupils to ensure pupils are able to graduate high school on time.

(f) A grant recipient shall develop a plan on or before April 1, 2022, describing how the funds received under this section will increase or improve services for unduplicated pupils to improve A–G eligibility, including information about the number of pupils identified for opportunities to retake courses pursuant to paragraph (2) of subdivision (e). The plan shall include information regarding how the plan and described services supplement, and do not supplant, those services identified in the school district's local control and accountability plan required pursuant to Section 52060, the county superintendent of schools' local control and accountability plan required pursuant to Section 52066, or the charter school's local control and accountability plan required pursuant to Section 47605 or 47605.6 and Section 47606.5, and the local educational agency's learning recovery program plan adopted pursuant to Section 43522. The plan shall also include a description of the extent to which all pupils within the local educational agency, particularly unduplicated pupils, will have access to A–G courses approved by the University of California. In order to ensure community and stakeholder input, the plan shall be discussed at a regularly scheduled meeting by the governing board of the school district, county board of education, or governing body of the charter school and adopted at a subsequent regularly scheduled meeting.

(g) A grant recipient shall report to the Superintendent on or before December 31, 2023, on how they are measuring the impact of the funds received under this section on their A–G completion rate, as identified within their plan, and the outcomes based on those measurements. The department shall compile the information reported pursuant to this subdivision and submit a report to the appropriate policy and fiscal committees of the Legislature on or before April 30, 2024, and shall update the state board on the contents of that report at a regularly scheduled

A-G Success Grant:
automatic allocation
based on unduplicated pupils

A-G Learning Loss Mitigation Grant:
automatic allocation
based on unduplicated pupils

Development of
plan by April 1, 2022

Reports due on December 31, 2023
and August 31, 2026

Section 41590
Establishment of A-G Completion
Improvement Grant Program
(continued)

meeting of the state board. A grant recipient shall report to the Superintendent on or before August 31, 2026, on final outcomes that measure the impact of the funds received under this section on their A-G completion rate.

(h) The Superintendent shall annually post on the department's internet website in an easily accessible location a list of each local educational agency's and each individual high school's A-G completion rate.

(i) For purposes of this section, the following definitions apply:

(1) "A-G completion rate" means the percentage of pupils who have satisfied the A-G subject matter requirements for admission to the California State University and the University of California with a grade of "C" or better in each of the required courses upon graduation for the prior year.

(2) "A-G course" means a course that may be used to satisfy the A-G subject matter requirements for admission to the California State University and the University of California.

(3) "A-G eligibility" means the pupil has satisfied the A-G subject matter requirements for admission to the California State University and the University of California with a grade of "C" or better in each of the required courses.

(4) "Local educational agency" means a school district, county office of education, or charter school.

(5) "Unduplicated pupil" has the same meaning as in Sections 42238.01 and 42238.02.

(j) For purposes of making the computations required by Section 8 of Article XVI of the California Constitution, the appropriation made by subdivision (a) shall be deemed to be "General Fund revenues appropriated for school districts," as defined in subdivision (c) of Section 41202, for the 2020-21 fiscal year, and included within the "total allocations to school districts and community college districts from General Fund proceeds of taxes appropriated pursuant to Article XIII B," as defined in subdivision (e) of Section 41202, for the 2020-21 fiscal year.

FINANCIAL REPORTING
Education Code

Section 42100
Form of unaudited actuals financial
report due by September 15

(a) On or before September 15, the governing board of each school district shall approve, in a format prescribed by the Superintendent of Public Instruction, an annual statement of all receipts and expenditures of the district for the preceding fiscal year and shall file the statement, along with the statement received pursuant to subdivision (b), with the county superintendent of schools. On or before October 15, the county superintendent of schools shall verify the mathematical accuracy of the statements and shall transmit a copy to the Superintendent of Public Instruction.

(b) On or before September 15, each charter school shall approve, in a format prescribed by the Superintendent of Public Instruction, an annual statement of all receipts and expenditures of the charter school for the preceding fiscal year and shall file the statement with the entity that approved the charter school.

(c) The forms prescribed by the Superintendent of Public Instruction shall be adopted as regulations by the State Board of Education, and may be amended periodically to accommodate changes in statute or government reporting standards.

LOCAL CONTROL FUNDING FORMULA (SELECTED PROVISIONS)
Education Code

Section 42238.01
Definitions
Eligible for free or
reduced-price meals

For purposes of Section 42238.02, the following definitions shall apply:

(a) "Eligible for free or reduced-price meals" means determined to meet federal income eligibility criteria, either through completing an application for the federal National School Lunch Program or through an alternative household income data collection form, or deemed to be categorically eligible for free or reduced-price meals under the federal National School Lunch Program, as described in Part 245 of Title 7 of the Code of Federal Regulations.

(1) (A) A school participating in a special assistance alternative authorized by Section 11(a)(1) of the federal Richard B. Russell National School Lunch Act (Public Law 113-79), including Provision 2, Provision 3, or the Community Eligibility Provision, may establish a base year for purposes of the local control funding formula by doing either of the following:

(i) Determining the pupils at the school who are eligible for free or reduced-price meals and using each pupil's eligibility status in that base year to report eligibility for up to each of the following three school years.

(ii) Carrying forward eligibility for pupils eligible for free or reduced-price meals from the school year in which the school applied to use a federal universal school meal provision, and using each pupil's eligibility status from the application year to report eligibility for up to each of the following three school years.

(B) The school may include between base year eligibility determinations, any newly enrolled pupils who are determined to be eligible for free or reduced-price meals or any current pupils found to be newly eligible for free or reduced-price meals as identified through a local or state direct certification match or another categorical designation.

Section 42238.01

Definitions

(continued)

(2) A school that uses the special assistance alternative shall maintain information on each pupil's eligibility status and annually submit information on that status in the California Longitudinal Pupil Achievement Data System pursuant to paragraph (2) of subdivision (b) of Section 42238.02 or subparagraph (A) of paragraph (3) of subdivision (b) of Section 2574, as applicable.

(3) For a pupil who transfers to a school using a special assistance alternative and who is transferring between schools within the same school district, documentation supporting eligibility for that pupil for purposes of the local control funding formula may be transferred from the pupil's old school to the pupil's new school, as long as the documentation supporting eligibility for that pupil is less than four years old and is updated at least once every four years.

(4) To the extent permitted by federal law, a school may choose to establish a new base year for purposes of the federal National School Lunch Program at the same time the school establishes a new base year for purposes of the local control funding formula. A school may use federal National School Lunch Program application forms to collect household income data as permitted under the federal National School Lunch Program. If the use of federal National School Lunch Program application forms is not permitted, a school shall use alternative household income data collection forms.

(5) An alternative household income data collection form shall be confidential and shall not be shared by the school other than as necessary for purposes of determining funding allocations under the local control funding formula and for assessing the accountability of that funding. An alternative household income data collection form shall contain, at a minimum, all of the following information:

(A) Information sufficient to identify the pupil or pupils.

(B) Information sufficient to determine that the pupil or household meets federal income eligibility criteria sufficient to qualify for either a free or reduced-priced meal under the federal Richard B. Russell National School Lunch Act (Public Law 113-79).

(C) Certification that the information is true and correct by the pupil's adult household member.

(6) Paragraphs (1) and (3) are effective commencing with the 2014–15 fiscal year.

(b) "Foster youth" means any of the following:

(1) A child who is the subject of a petition filed pursuant to Section 300 of the Welfare and Institutions Code, whether or not the child has been removed from the child's home by the juvenile court pursuant to Section 319 or 361 of the Welfare and Institutions Code.

(2) A child who is the subject of a petition filed pursuant to Section 602 of the Welfare and Institutions Code, has been removed from the child's home by the juvenile court pursuant to Section 727 of the Welfare and Institutions Code, and is in foster care as defined by subdivision (d) of Section 727.4 of the Welfare and Institutions Code.

(3) A nonminor under the transition jurisdiction of the juvenile court, as described in Section 450 of the Welfare and Institutions Code, who satisfies all of the following criteria:

(A) The nonminor has attained 18 years of age while under an order of foster care placement by the juvenile court, and is not more than 19 years of age on or after January 1, 2012, not more than 20 years of age on or after January 1, 2013, and not more than 21 years of age, on or after January 1, 2014, and as described in Section 10103.5 of the Welfare and Institutions Code.

(B) The nonminor is in foster care under the placement and care responsibility of the county welfare department, county probation department, Indian tribe, consortium of tribes, or tribal organization that entered into an agreement pursuant to Section 10553.1 of the Welfare and Institutions Code.

(C) The nonminor is participating in a transitional independent living case plan pursuant to Section 475(8) of the federal Social Security Act (42 U.S.C. Sec. 675), as contained in the federal Fostering Connections to Success and Increasing Adoptions Act of 2008 (Public Law 110-351), as described in Section 11403 of the Welfare and Institutions Code.

(4) A dependent child of the court of an Indian tribe, consortium of tribes, or tribal organization who is the subject of a petition filed in the tribal court pursuant to the tribal court's jurisdiction in accordance with the tribe's law.

(5) A child who is the subject of a voluntary placement agreement, as defined in subdivision (p) of Section 11400 of the Welfare and Institutions Code.

(c) "Pupils of limited English proficiency" means pupils who do not have the clearly developed English language skills of comprehension, speaking, reading, and writing necessary to receive instruction only in English at a level substantially equivalent to pupils of the same age or grade whose primary language is English. "English learner" shall have the same meaning as provided for in subdivision (a) of Section 306 and as "pupils of limited English proficiency."

Foster youth

English learners

(a) The amount computed pursuant to this section shall be known as the school district and charter school local control funding formula

(b) (1) For purposes of this section "unduplicated pupil" means a pupil enrolled in a school district or a charter school who is either classified as an English learner, eligible for a free or reduced-price meal, or is a foster youth. A pupil shall be counted only once for purposes of this section if any of the following apply:

(A) The pupil is classified as an English learner and is eligible for a free or reduced-price meal.

Section 42238.02

Local control funding formula (LCFF)

Unduplicated pupils

Section 42238.02
Local control
funding formula (LCFF)

(continued)

CALPADS submission of unduplicated pupil data

County review of unduplicated pupil data

Review and revise data

Formula for computing percentage of unduplicated pupils

LCFF calculates annually

Base grant

(B) The pupil is classified as an English learner and is a foster youth
(C) The pupil is eligible for a free or reduced-price meal and is classified as a foster youth.
(D) The pupil is classified as an English learner, is eligible for a free or reduced-price meal, and is a foster youth.

(2) Under procedures and timeframes established by the Superintendent, commencing with the 2013–14 fiscal year, a school district or charter school shall annually submit its enrolled free and reduced-price meal eligibility, foster youth, and English learner pupil-level records for enrolled pupils to the Superintendent using the California Longitudinal Pupil Achievement Data System.

(3) (A) Commencing with the 2013–14 fiscal year, a county office of education shall review and validate certified aggregate English learner, foster youth, and free or reduced-price meal eligible pupil data for school districts and charter schools under its jurisdiction to ensure the data is reported accurately. The Superintendent shall provide each county office of education with appropriate access to school district and charter school data reports in the California Longitudinal Pupil Achievement Data System for purposes of ensuring data reporting accuracy.

(B) The Controller shall include the instructions necessary to enforce paragraph (2) in the audit guide required by Section 14502.1. The instructions shall include, but are not necessarily limited to, procedures for determining if the English learner, foster youth, and free or reduced-price meal eligible pupil counts are consistent with the school district's or charter school's English learner, foster youth, and free or reduced-price meal eligible pupil records.

(4) The Superintendent shall make the calculations pursuant to this section using the data submitted by local educational agencies, including charter schools, through the California Longitudinal Pupil Achievement Data System. Under timeframes and procedures established by the Superintendent, school districts and charter schools may review and revise their submitted data on English learner, foster youth, and free or reduced-price meal eligible pupil counts to ensure the accuracy of data reflected in the California Longitudinal Pupil Achievement Data System.

(5) The Superintendent shall annually compute the percentage of unduplicated pupils for each school district and charter school by dividing the enrollment of unduplicated pupils in a school district or charter school by the total enrollment in that school district or charter school pursuant to all of the following:

(A) For the 2013–14 fiscal year, divide the sum of unduplicated pupils for the 2013–14 fiscal year by the sum of the total pupil enrollment for the 2013–14 fiscal year.

(B) For the 2014–15 fiscal year, divide the sum of unduplicated pupils for the 2013–14 and 2014–15 fiscal years by the sum of the total pupil enrollment for the 2013–14 and 2014–15 fiscal years.

(C) For the 2015–16 fiscal year and each fiscal year thereafter, divide the sum of unduplicated pupils for the current fiscal year and the two prior fiscal years by the sum of the total pupil enrollment for the current fiscal year and the two prior fiscal years.

(D) (i) For purposes of the quotients determined pursuant to subparagraphs (B) and (C), the Superintendent shall use a school district's or charter school's enrollment of unduplicated pupils and total pupil enrollment in the 2014–15 fiscal year instead of the enrollment of unduplicated pupils and total pupil enrollment in the 2013–14 fiscal year if doing so would yield an overall greater percentage of unduplicated pupils.

(ii) It is the intent of the Legislature to review each school district and charter school's enrollment of unduplicated pupils for the 2013–14 and 2014–15 fiscal years and provide one-time funding, if necessary, for a school district or charter school with higher enrollment of unduplicated pupils in the 2014–15 fiscal year as compared to the 2013–14 fiscal year.

(E) (i) Notwithstanding any other law, for purposes of subparagraph (C), the unduplicated pupils and total pupil enrollment in prior fiscal years shall be the following:

(I) For a transferred charter school, the counts shall be equal to the counts reported for the original charter school.

(II) For an acquiring charter school, the counts shall be equal to the counts reported for the original charter school. This subclause shall become inoperative on July 1, 2026, unless its operation is extended by the Legislature.

(III) For the restructured portions of a divided charter school, the counts shall be zero.

(IV) For the remaining portion of a divided charter school, the counts shall be equal to the counts reported for the original charter school.

(ii) The definitions in Section 47654 apply for purposes of this subparagraph.

(6) Notwithstanding subdivision (a) of Section 14002, the data used to determine the percentage of unduplicated pupils shall be final once that data is no longer used in the current fiscal year calculation of the percentage of unduplicated pupils. This paragraph does not apply to a change that is the result of an audit exception, as described in paragraph (2) of subdivision (a) of Section 41341.

(c) Commencing with the 2013–14 fiscal year and each fiscal year thereafter, the Superintendent shall annually calculate a local control funding formula grant for each school district and charter school in the state pursuant to this section.

(d) The Superintendent shall compute a grade span adjusted base grant equal to the total of the following amounts:

(1) For the 2013–14 fiscal year, a base grant of:

(A) Six thousand eight hundred forty-five dollars (\$6,845) for average daily attendance in kindergarten and grades 1 to 3, inclusive.

(B) Six thousand nine hundred forty-seven dollars (\$6,947) for average daily attendance in grades 4 to 6, inclusive.

(C) Seven thousand one hundred fifty-four dollars (\$7,154) for average daily attendance in grades 7 and 8.

(D) Eight thousand two hundred eighty-nine dollars (\$8,289) for average daily attendance in grades 9 to 12, inclusive.

(2) In each year the grade span adjusted base grants in paragraph (1) shall be adjusted by the percentage change in the annual average value of the Implicit Price Deflator for State and Local Government Purchases of Goods and Services for the United States, as published by the United States Department of Commerce for the 12-month period ending in the third quarter of the prior fiscal year. This percentage change shall be determined using the latest data available as of May 10 of the preceding fiscal year compared with the annual average value of the same deflator for the 12-month period ending in the third quarter of the second preceding fiscal year, using the latest data available as of May 10 of the preceding fiscal year, as reported by the Department of Finance.

(3) (A) The Superintendent shall compute an additional adjustment to the kindergarten and grades 1 to 3, inclusive, base grant as adjusted pursuant to paragraphs (2) and (5) equal to 10.4 percent. The additional grant shall be calculated by multiplying the kindergarten and grades 1 to 3, inclusive, base grant, as adjusted by paragraphs (2) and (5), by 10.4 percent.

(B) Until paragraph (4) of subdivision (b) of Section 42238.03 is effective, as a condition of the receipt of funds in this paragraph, a school district shall make progress toward maintaining an average class enrollment of not more than 24 pupils for each schoolsite in kindergarten and grades 1 to 3, inclusive, unless a collectively bargained alternative annual average class enrollment for each schoolsite in those grades is agreed to by the school district, pursuant to the following calculation:

(i) Determine a school district's average class enrollment for each schoolsite for kindergarten and grades 1 to 3, inclusive, in the prior year. For the 2013–14 fiscal year, this amount shall be the average class enrollment for each schoolsite for kindergarten and grades 1 to 3, inclusive, in the 2012–13 fiscal year.

(ii) Determine a school district's proportion of total need pursuant to paragraph (2) of subdivision (b) of Section 42238.03.

(iii) Determine the percentage of the need calculated in clause (ii) that is met by funding provided to the school district pursuant to paragraph (3) of subdivision (b) of Section 42238.03.

(iv) Determine the difference between the amount computed pursuant to clause (i) and an average class enrollment of not more than 24 pupils.

(v) Calculate a current year average class enrollment adjustment for each schoolsite for kindergarten and grades 1 to 3, inclusive, equal to the adjustment calculated in clause (iv) multiplied by the percentage determined pursuant to clause (iii).

(C) School districts that have an average class enrollment for each schoolsite for kindergarten and grades 1 to 3, inclusive, of 24 pupils or less for each schoolsite in the 2012–13 fiscal year, shall be exempt from the requirements of subparagraph (B) so long as the school district continues to maintain an average class enrollment for each schoolsite for kindergarten and grades 1 to 3, inclusive, of not more than 24 pupils, unless a collectively bargained alternative ratio is agreed to by the school district.

(D) (i) Upon full implementation of the local control funding formula, as a condition of the receipt of funds in this paragraph, all school districts shall maintain an average class enrollment for each schoolsite for kindergarten and grades 1 to 3, inclusive, of not more than 24 pupils for each schoolsite in kindergarten and grades 1 to 3, inclusive, unless a collectively bargained alternative ratio is agreed to by the school district.

(ii) Notwithstanding clause (i), for purposes of meeting the requirements of paragraph (1) of subdivision (g) of Section 48000, a school district shall maintain an average transitional kindergarten class enrollment of not more than 24 pupils for each schoolsite.

(E) The average class enrollment requirement for each schoolsite for kindergarten and grades 1 to 3, inclusive, established pursuant to this paragraph shall not be subject to waiver by the state board pursuant to Section 33050 or by the Superintendent.

(F) The Controller shall include the instructions necessary to enforce this paragraph in the audit guide required by Section 14502.1. The instructions shall include, but are not necessarily limited to, procedures for determining if the average class enrollment for each schoolsite for kindergarten and grades 1 to 3, inclusive, exceeds 24 pupils, or an alternative average class enrollment for each schoolsite pursuant to a collectively bargained alternative ratio. The procedures for determining average class enrollment for each schoolsite shall include criteria for employing sampling.

(4) The Superintendent shall compute an additional adjustment to the base grant for grades 9 to 12, inclusive, as adjusted pursuant to paragraphs (2) and (5), equal to 2.6 percent. The additional grant shall be calculated by multiplying the base grant for grades 9 to 12, inclusive, as adjusted by paragraphs (2) and (5) by 2.6 percent.

Supplemental grant

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(5) For the 2022–23 fiscal year, the Superintendent shall increase the base grants for kindergarten and grades 1 to 12, inclusive, by 6.7 percent. This adjustment shall be calculated by multiplying the grade span-adjusted base grants calculated pursuant to paragraph (2) for the 2021–22 fiscal year by 6.7 percent. The adjustment shall be included in grade span-adjusted base grants amounts for purposes of the adjustment pursuant to paragraph (2) commencing with the 2023–24 fiscal year.

(e) The Superintendent shall compute a supplemental grant add-on equal to 20 percent of the base grants as specified in subparagraphs (A) to (D), inclusive, of paragraph (1) of subdivision (d), as adjusted by paragraphs (2) to (5), inclusive, of subdivision (d), for each school district's or charter school's percentage of unduplicated pupils calculated pursuant to paragraph (5) of subdivision (b). The supplemental grant shall be calculated by multiplying the base grants as specified in subparagraphs (A) to (D), inclusive, of paragraph (1), as adjusted by paragraphs (2) to (5), inclusive, of subdivision (d), by 20 percent and by the percentage of unduplicated pupils calculated pursuant to paragraph (5) of subdivision (b) in that school district or charter school. The supplemental grant shall be expended in accordance with the regulations adopted pursuant to Section 42238.07.

Concentration grant

(f) (1) (A) The Superintendent shall compute a concentration grant add-on equal to 50 percent of the base grants as specified in subparagraphs (A) to (D), inclusive, of paragraph (1) of subdivision (d), as adjusted by paragraphs (2) to (5), inclusive, of subdivision (d), for each school district's or charter school's percentage of unduplicated pupils calculated pursuant to paragraph (5) of subdivision (b) in excess of 55 percent of the school district's or charter school's total enrollment. The concentration grant shall be calculated by multiplying the base grants as specified in subparagraphs (A) to (D), inclusive, of paragraph (1) of subdivision (d), as adjusted by paragraphs (2) to (5), inclusive, of subdivision (d), by 50 percent and by the percentage of unduplicated pupils calculated pursuant to paragraph (5) of subdivision (b) in excess of 55 percent of the total enrollment in that school district or charter school.

(B) Commencing with the 2021–22 fiscal year, the concentration grant add-on referenced in subparagraph (A) shall instead be equal to 65 percent of the base grants as specified in subparagraphs (A) to (D), inclusive, of paragraph (1) of subdivision (d), as adjusted by paragraphs (2) to (5), inclusive, of subdivision (d), for each school district's or charter school's percentage of unduplicated pupils calculated pursuant to paragraph (5) of subdivision (b) in excess of 55 percent of the school district's or charter school's total enrollment. The concentration grant shall be calculated by multiplying the base grants as specified in subparagraphs (A) to (D), inclusive, of paragraph (1) of subdivision (d), as adjusted by paragraphs (2) to (5), inclusive, of subdivision (d), by 65 percent and by the percentage of unduplicated pupils calculated pursuant to paragraph (5) of subdivision (b) in excess of 55 percent of the total enrollment in that school district or charter school.

(2) (A) For a charter school physically located in only one school district, the percentage of unduplicated pupils calculated pursuant to paragraph (5) of subdivision (b) in excess of 55 percent used to calculate concentration grants shall not exceed the percentage of unduplicated pupils calculated pursuant to paragraph (5) of subdivision (b) in excess of 55 percent of the school district in which the charter school is physically located. For a charter school physically located in more than one school district, the charter school's percentage of unduplicated pupils calculated pursuant to paragraph (5) of subdivision (b) in excess of 55 percent used to calculate concentration grants shall not exceed that of the school district with the highest percentage of unduplicated pupils calculated pursuant to paragraph (5) of subdivision (b) in excess of 55 percent of the school districts in which the charter school has a school facility. The concentration grant shall be expended in accordance with the regulations adopted pursuant to Section 42238.07.

Report of a physical location

(B) For purposes of this paragraph and subparagraph (A) of paragraph (1) of subdivision (f) of Section 42238.03, a charter school shall report its physical location to the department under timeframes established by the department. For a charter school authorized by a school district, the department shall include the authorizing school district in the department's determination of physical location. For a charter school authorized on appeal pursuant to subdivision (k) of Section 47605, the department shall include the school district that initially denied the petition in the department's determination of physical location. Notwithstanding subdivision (a) of Section 14002, the reported physical location of the charter school shall be considered final as of the second principal apportionment for that fiscal year, and, for purposes of this paragraph, the percentage of unduplicated pupils of the school district associated with the charter school pursuant to subparagraph (A) shall be considered final as of the second principal apportionment for that fiscal year.

Add-on equal to amounts previously received for Targeted Instructional Improvement Block Grant program

(g) (1) The Superintendent shall compute an add-on to the total sum of a school district's or charter school's base, supplemental, and concentration grants equal to the amount of funding a school district or charter school received from funds allocated pursuant to the Targeted Instructional Improvement Block Grant program, as set forth in Article 6 (commencing with Section 41540) of Chapter 3.2, for the 2012–13 fiscal year, as that article read on January 1, 2013. A school district or charter school shall not receive a total funding amount from this add-on greater than the total amount of funding received by the school district or charter school from that program in the 2012–13 fiscal year. The amount computed pursuant to this subdivision shall reflect the reduction

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specified in paragraph (2) of subdivision (a) of Section 42238.03.

(2) Notwithstanding Section 42238.05, commencing with the 2022–23 fiscal year, the Superintendent shall compute an add-on to the total sum of a school district's or charter school's base, supplemental, and concentration grants equal to two thousand eight hundred thirteen dollars (\$2,813) multiplied by the then current fiscal year's second principal apportionment period average daily attendance in transitional kindergarten. Commencing with the 2023–24 fiscal year, the add-on computed pursuant to this paragraph shall be adjusted by the percentage change applied pursuant to paragraph (2) of subdivision (d). It is the intent of the Legislature that the costs to meet the requirements of paragraph (2) of subdivision (g) of Section 48000 be supported by the add-on computed pursuant to this paragraph.

(h) (1) The Superintendent shall compute an add-on to the total sum of a school district's or charter school's base, supplemental, and concentration grants equal to the amount of funding a school district or charter school received from funds allocated pursuant to the Home-to-School Transportation program, as set forth in former Article 2 (commencing with Section 39820) of Chapter 1 of Part 23.5, former Article 10 (commencing with Section 41850) of Chapter 5, and the Small School District Transportation program, as set forth in former Article 4.5 (commencing with Section 42290), as those articles read on January 1, 2013, for the 2012–13 fiscal year. A school district or charter school shall not receive a total funding amount from this add-on greater than the total amount received by the school district or charter school for those programs in the 2012–13 fiscal year. The amount computed pursuant to this subdivision shall reflect the reduction specified in paragraph (2) of subdivision (a) of Section 42238.03.

Add-on equal to amounts previously received for Home-to-School program

(2) If a home-to-school transportation joint powers agency, established pursuant to Article 1 (commencing with Section 6500) of Chapter 5 of Division 7 of Title 1 of the Government Code for purposes of providing pupil transportation, received an apportionment directly from the Superintendent from any of the funding sources specified in paragraph (1) for the 2012–13 fiscal year, the joint powers agency may identify the member local educational agencies and transfer entitlement to that funding to any of those member local educational agencies by reporting to the Superintendent, on or before September 30, 2015, the reassignment of a specified amount of the joint powers agency's 2012–13 fiscal year entitlement to the member local educational agency. Commencing with the 2015–16 fiscal year, the Superintendent shall compute an add-on to the total sum of a school district's or charter school's base, supplemental, and concentration grants equal to the amount of the entitlement to funding transferred by the joint powers agency to the member school district or charter school.

(3) Commencing in the 2023–24 fiscal year, the add-on amounts referenced in paragraphs (1) and (2) shall receive the annual cost-of-living adjustment specified in paragraph (2) of subdivision (d).

(i) (1) The sum of the local control funding formula rates computed pursuant to subdivisions (c) to (f), inclusive, shall be multiplied by:

ADA multiplier

(A) For school districts, the average daily attendance of the school district in the corresponding grade level ranges computed pursuant to Section 42238.05, excluding the average daily attendance computed pursuant to paragraph (2) of subdivision (a) of Section 42238.05 for purposes of the computation specified in subdivision (d).

(B) For charter schools, the total current year average daily attendance in the corresponding grade level ranges.

(2) The amount computed pursuant to Article 4 (commencing with Section 42280) shall be added to the amount computed pursuant to paragraphs (1) to (4), inclusive, of subdivision (d), as multiplied by subparagraph (A) or (B) of paragraph (1), as appropriate.

(j) The Superintendent shall adjust the sum of each school district's or charter school's amount determined in subdivisions (g) to (i), inclusive, pursuant to the calculation specified in Section 42238.03, less the sum of the following:

Adjustment

(1) (A) For school districts, the property tax revenue received pursuant to Chapter 3.5 (commencing with Section 75) and Chapter 6 (commencing with Section 95) of Part 0.5 of Division 1 of the Revenue and Taxation Code.

(B) For charter schools, the in-lieu property tax amount provided to a charter school pursuant to Section 47635.

(2) The amount, if any, received pursuant to Part 18.5 (commencing with Section 38101) of Division 2 of the Revenue and Taxation Code.

(3) The amount, if any, received pursuant to Chapter 3 (commencing with Section 16140) of Part 1 of Division 4 of Title 2 of the Government Code.

(4) Prior years' taxes and taxes on the unsecured roll.

(5) Fifty percent of the amount received pursuant to Section 41603.

(6) The amount, if any, received pursuant to the Community Redevelopment Law (Part 1 (commencing with Section 33000) of Division 24 of the Health and Safety Code), less any amount received pursuant to Section 33401 or 33676 of the Health and Safety Code that is used for land acquisition, facility construction, reconstruction, or remodeling, or deferred maintenance and that is not an amount received pursuant to Section 33492.15, or paragraph (4) of subdivision (a) of

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Section 33607.5, or Section 33607.7 of the Health and Safety Code that is allocated exclusively for educational facilities.

(7) The amount, if any, received pursuant to Sections 34177, 34179.5, 34179.6, 34183, and 34188 of the Health and Safety Code.

(8) Revenue received pursuant to subparagraph (B) of paragraph (3) of subdivision (e) of Section 36 of Article XIII of the California Constitution.

(k) A school district shall annually transfer to each of its charter schools funding in lieu of property taxes pursuant to Section 47635.

(l) (1) This section does not authorize a school district that receives funding on behalf of a charter school pursuant to Section 47651 to redirect this funding for another purpose unless otherwise authorized in law pursuant to paragraph (2) or pursuant to an agreement between the charter school and its chartering authority.

(2) A school district that received funding on behalf of a locally funded charter school in the 2012–13 fiscal year pursuant to paragraph (2) of subdivision (b) of Section 42605, Section 42606, and subdivision (b) of Section 47634.1, as those sections read on January 1, 2013, or a school district that was required to pass through funding to a conversion charter school in the 2012–13 fiscal year pursuant to paragraph (2) of subdivision (b) of Section 42606, as that section read on January 1, 2013, may annually redirect for another purpose a percentage of the amount of the funding received on behalf of that charter school. The percentage of funding that may be redirected shall be determined pursuant to the following computation:

(A) (i) Determine the sum of the need fulfilled for that charter school pursuant to paragraph (3) of subdivision (b) of Section 42238.03 in the then current fiscal year for the charter school.

(ii) Determine the sum of the need fulfilled in every fiscal year before the then current fiscal year pursuant to paragraph (3) of subdivision (b) of Section 42238.03 adjusted for changes in average daily attendance pursuant to paragraph (3) of subdivision (a) of Section 42238.03 for the charter school.

(iii) Subtract the amount computed pursuant to paragraphs (1) to (3), inclusive, of subdivision (a) of Section 42238.03 from the amount computed for that charter school under the local control funding formula entitlement computed pursuant to subdivision (i) of this section.

(iv) Compute a percentage by dividing the sum of the amounts computed pursuant to clauses (i) and (ii) by the amount computed pursuant to clause (iii).

(B) Multiply the percentage computed pursuant to subparagraph (A) by the amount of funding the school district received on behalf of the charter school in the 2012–13 fiscal year pursuant to paragraph (2) of subdivision (b) of Section 42605, Section 42606, and subdivision (b) of Section 47634.1, as those sections read on January 1, 2013.

(C) The maximum amount that may be redirected shall be the lesser of the amount of funding the school district received on behalf of the charter school in the 2012–13 fiscal year pursuant to paragraph (2) of subdivision (b) of Section 42605, Section 42606, and subdivision (b) of Section 47634.1, as those sections read on January 1, 2013, or the amount computed pursuant to subparagraph (B).

(3) Commencing with the 2013–14 fiscal year, a school district operating one or more affiliated charter schools shall provide each affiliated charter school schoolsite with no less than the amount of funding the schoolsite received pursuant to the charter school block grant in the 2012–13 fiscal year.

(m) Any calculations in law that are used for purposes of determining if a local educational agency is an excess tax school entity or basic aid school district, including, but not limited to, this section and Sections 41544, 42238.03, 47632, 47660, 47663, 48310, and 48359.5, and Section 95 of the Revenue and Taxation Code, shall exclude the revenue received pursuant to subparagraph (B) of paragraph (3) of subdivision (e) of Section 36 of Article XIII of the California Constitution.

LCAP (n) The funds apportioned pursuant to this section and Section 42238.03 shall be available to implement the activities required pursuant to Article 4.5 (commencing with Section 52059.5) of Chapter 6.1 of Part 28 of Division 4.

Basic aid school district (o) A school district that does not receive an apportionment of state funds pursuant to this section, as implemented pursuant to Section 42238.03, excluding funds apportioned pursuant to the requirements of subparagraph (A) of paragraph (2) of subdivision (e) of Section 42238.03, shall be considered a “basic aid school district” or an “excess tax entity.”

Section 42238.023
LCFF entitlement calculations

(a) Notwithstanding any other law, for purposes of calculating local control funding formula entitlements pursuant to Sections 42238.02, 42238.03, 2574, and 2576, as applicable, if the Superintendent determines that a local educational agency’s attendance yield in the 2019–20 fiscal year is greater than the attendance yield in the 2021–22 school year, the Superintendent shall adjust the local educational agency’s 2021–22 fiscal year average daily attendance in the manner described in subdivision (b). This determination shall be made by the following calculation for each local educational agency:

(1) Divide the total average daily attendance in the 2019–20 fiscal year reported for both the second period and the annual period apportionment, as applicable, by total enrollment from the

California Longitudinal Pupil Achievement Data System Fall 1 Certification for the 2019–20 fiscal year. This amount shall not exceed a value of one.

(2) Divide the total average daily attendance in the 2021–22 fiscal year reported for both the second period and annual period apportionment, as applicable, by total enrollment from the California Longitudinal Pupil Achievement Data System Fall 1 Certification for the 2021–22 fiscal year. This amount shall not exceed a value of one.

(3) Divide the amount determined in paragraph (1) by the amount determined in paragraph (2). If the resulting quotient is greater than one, the local educational agency's 2021–22 fiscal year average daily attendance shall be adjusted pursuant to subdivision (b).

(b) (1) For county offices of education, the Superintendent shall multiply the county office of education's 2021–22 fiscal year reported average daily attendance by the amount determined in paragraph (3) of subdivision (a) for the purpose of calculating the 2021–22 fiscal year annual apportionment pursuant to Sections 2574 and 2576.

(2) For school districts, the Superintendent shall make the following adjustments:

(A) Multiply the school district's 2021–22 fiscal year reported average daily attendance by the amount determined in paragraph (3) of subdivision (a) for purposes of calculating the 2021–22 fiscal year annual apportionment pursuant to Sections 42238.02 and 42238.03.

(B) Multiply the school district's 2021–22 fiscal year reported average daily attendance by the amount determined in paragraph (3) of subdivision (a) for purposes of calculating prior year average daily attendance or the average attendance of the three most recent prior fiscal years pursuant to Sections 42238.05 and 42280 in the 2022–23 to 2024–25 fiscal years, inclusive.

(3) For charter schools, excluding a charter school classified as a nonclassroom-based charter school as of the 2021–22 fiscal year second principal apportionment certification pursuant to Section 47612.5, the Superintendent shall multiply the charter school's 2021–22 fiscal year reported average daily attendance by the amount determined in paragraph (3) of subdivision (a) for the purpose of calculating the 2021–22 fiscal year annual apportionment pursuant to Sections 42238.02 and 42238.03.

(c) (1) The calculations pursuant to subdivisions (a) and (b) shall only be applied to school districts and county offices of education that meet the following requirements:

(A) By no later than November 1, 2021, offered an independent study program to all pupils, for the 2021–22 school year, consistent with the requirements of Section 51745, and provided the notification to parents and guardians of all enrolled pupils pursuant to paragraph (1) of subdivision (h) of Section 51747 and subparagraph (A) of paragraph (8) of subdivision (b) of Section 51749.6.

(B) By no later than November 1, 2021, adopted written policies for providing instruction to pupils through independent study, and have verifiable documentation substantiating the provision of opportunities for live interaction and synchronous instruction pursuant to Section 51745.5, if applicable, or the provision of activities or pupil work product of a pupil while out on independent study that is equivalent to in-person instruction pursuant to Sections 51747 and 51749.5.

(2) In the 2021–22 school year, a school district or county office of education that received a waiver by June 15, 2022, pursuant to subdivision (g) of Section 51745, from independent study requirements, or a school district or county office of education that entered into a contract with a county office of education or an interdistrict transfer agreement with another school district pursuant to subdivision (f) of Section 51745 for the offering of independent study, shall be deemed to have met the requirements specified in paragraph (1).

(3) (A) On or before November 1, 2022, a school district or county office of education shall certify its compliance with paragraph (1) or (2) using a form the department shall provide for this purpose. A school district or county office of education that does not certify compliance shall not receive the 2021–22 average daily attendance calculation pursuant to this Section.

(B) The department shall make this form available to school districts and county offices of education on or before October 11, 2022.

(4) The 2022–23 fiscal year Guide for Annual Audits of K–12 Local Education Agencies and State Compliance Reporting, the Controller shall incorporate verification of compliance with the requirements specified in subparagraphs (A) and (B) of paragraph (1), which may include reviewing the local educational agency's annual audit for the 2021–22 fiscal year to determine compliance with those requirements.

(a) Commencing with the 2023–24 fiscal year, the sum of three hundred million dollars (\$300,000,000) is hereby appropriated each fiscal year from the General Fund to the Superintendent for allocation for the Local Control Funding Formula Equity Multiplier apportionment in the manner and for the purposes set forth in this section. Commencing with the 2024–25 fiscal year, the amount appropriated pursuant to this subdivision shall be adjusted each fiscal year by the percentage change applied pursuant to paragraph (2) of subdivision (d) of Section 42238.02 for that fiscal year.

(b) (1) Funds appropriated pursuant to subdivision (a) shall be made available by the Superintendent to eligible local educational agencies for allocation to schoolsites eligible pursuant to paragraph (2) for evidence-based services and supports for pupils, with a demonstration of how the

Section 42238.024
LCFF equity multiplier
apportionments
(continued)

resulting services and supports are increased or improved in comparison to services and supports that would have been provided at the schoolsites if the funding were not provided. Funds appropriated pursuant to subdivision (a) shall supplement, not supplant, funding provided for these schoolsites for purposes of the local control funding formula pursuant to Section 2574, 2575, or 42238.02, the Expanded Learning Opportunities Program pursuant to Section 46120, the Literacy Coaches and Reading Specialists Grant Program established pursuant to Section 137 of Chapter 52 of the Statutes of 2022, and the California Community Schools Partnership Act (Chapter 6 (commencing with Section 8900) of Part 6 of Division 1 of Title 1).

(2) For schoolsites with prior year nonstability rates greater than 25 percent and prior year socioeconomically disadvantaged pupil rates of greater than 70 percent, funding shall be allocated on a per-unit basis of the schoolsite's total prior year adjusted cumulative enrollment. The per-unit funding amount is based on total statewide eligible enrollment and the amount of funds available, as reported in the stability rate data file.

(3) An eligible schoolsite shall not receive funding pursuant to paragraph (2) of less than fifty thousand dollars (\$50,000).

(c) For purposes of this section, the following definitions apply:

(1) "Eligible local educational agency" means a school district, county office of education, or charter school that generates a local control funding formula entitlement pursuant to Sections 2574, 2575, or 42238.02, excluding a charter school classified as a nonclassroom-based charter school pursuant to Section 47612.5.

(2) "Nonstability rate" means the percentage of pupils who are either enrolled for less than 245 continuous days between July 1 and June 30 of the prior school year, or exited from a school between July 1 and June 30 of the prior school year due to either truancy, expulsion, or for unknown reasons and without stable subsequent enrollment at another school as identified in the stability rate data file.

(3) "Prior year adjusted cumulative enrollment" means any enrollment with a start date in the school year in transitional kindergarten, kindergarten, and grades 1 to 12, inclusive, as identified in the stability rate data file.

(4) "Schoolsite" means an individual school in an eligible local educational agency.

(5) "Socioeconomically disadvantaged pupil rate" means the percentage of pupils that meet any of the following criteria for the prior school year:

(A) Neither of the pupil's parents has a high school diploma.

(B) The pupil is eligible for free or reduced-price meals under the federal National School Lunch Program, including by direct certification.

(C) The pupil is a migratory child for purposes of Part C (commencing with Section 6391) of Subchapter I of Chapter 70 of Title 20 of the United States Code.

(D) The pupil is a homeless child or youth.

(E) The pupil is a foster youth.

(F) The pupil is enrolled in a county juvenile court school.

(6) "Stability rate data file" means the initial publication of the annual file published by the department for the prior school year that will be used to determine a schoolsite's prior year adjusted cumulative enrollment, nonstability rate, and socioeconomically disadvantaged rate for the purposes of calculating funding pursuant to this section for an eligible local educational agency.

(d) Notwithstanding Section 10231.5 of the Government Code, by February 1, 2025, and each February 1 thereafter, the department, using existing resources, shall submit an annual report to the relevant policy and fiscal committees of the Legislature, the state board, and the Department of Finance that includes the following information on pupil outcomes at schoolsites that receive funding pursuant to this section and statewide pupil outcomes:

(1) Pupil subgroup data captured in the stability rate data file, based on enrollment at the eligible schoolsite.

(2) Number of truant pupils captured in the stability rate data file and enrolled at the eligible schoolsite.

(3) Number of expelled pupils captured in the stability rate data file and enrolled at the eligible schoolsite.

(4) Number of pupils whose reasons for exit from the schoolsite are unknown, as captured in the stability rate data file, and enrolled at the eligible schoolsite.

(5) Performance of the eligible schoolsites on California School Dashboard state indicators, disaggregated by pupil subgroup.

(e) For purposes of making the computations required by Section 8 of Article XVI of the California Constitution, the appropriations made by subdivision (a) shall be deemed to be "General Fund revenues appropriated for school districts," as defined in subdivision (c) of Section 41202, for the fiscal year for which the appropriation is made, and included within the "total allocations to school districts and community college districts from General Fund proceeds of taxes appropriated pursuant to Article XIII B," as defined in subdivision (e) of Section 41202, for the fiscal year for which the appropriation is made.

EXPANDED LEARNING OPPORTUNITIES PROGRAM

Education Code

(a) (1) It is the intent of the Legislature that all local educational agencies offer all unduplicated pupils in classroom-based instructional programs access to comprehensive after school and intersessional expanded learning opportunities.

(2) The Expanded Learning Opportunities Program is hereby established.

(b) (1) For the 2021–22 and 2022–23 school years, local educational agencies that receive funds pursuant to subdivision (d) shall offer to at least all unduplicated pupils in classroom-based instructional programs in kindergarten and grades 1 to 6, inclusive, and provide to at least 50 percent of enrolled unduplicated pupils in classroom-based instructional programs in kindergarten and grades 1 to 6, inclusive, access to expanded learning opportunity programs. Funding received pursuant to this section for the 2021–22 and 2022–23 school years shall be expended to develop an expanded learning opportunity program or provide services in accordance with program requirements. Commencing with the 2023–24 school year, as a condition of receipt of funds allocated pursuant to subparagraph (B) of paragraph (1) of subdivision (d), local educational agencies shall offer to all pupils in classroom-based instructional programs in kindergarten and grades 1 to 6, inclusive, access to expanded learning opportunity programs, and shall provide access to any pupil whose parent or guardian requests their placement in a program.

Commencing with the 2023–24 school year, as a condition of receipt of funds allocated pursuant to subparagraph (C) of paragraph (1) of subdivision (d), local educational agencies shall offer to at least all unduplicated pupils in classroom-based instructional programs in kindergarten and grades 1 to 6, inclusive, access to expanded learning opportunity programs, and shall provide access to any unduplicated pupil whose parent or guardian requests their placement in a program. Expanded learning opportunity programs shall include all of the following:

(A) On schooldays, as described in Section 46100 and Sections 46110 to 46119, inclusive, and days on which school is taught for the purpose of meeting the 175-instructional-day offering as described in Section 11960 of Title 5 of the California Code of Regulations, in-person before or after school expanded learning opportunities that, when added to daily instructional minutes, recess, and meals, are no less than nine hours of combined instructional time, recess, meals, and expanded learning opportunities per instructional day.

(B) (i) For at least 30 nonschooldays, inclusive of extended school year days provided pursuant to paragraph (3) of subdivision (b) of Section 56345, no less than nine hours of in-person expanded learning opportunities per day.

(ii) Extended school year days may include in-person before or after school expanded learning opportunities that, when added to daily instructional minutes, recess, and meals, are not less than nine hours of combined instructional time, recess, meals, and expanded learning opportunities per instructional day.

(C) For expanded learning opportunity programs located in a frontier designated geographical location, program requirements are no less than eight hours of combined instructional time, recess, meals, and in-person before or after school expanded learning opportunities per instructional day, and no less than eight hours of in-person expanded learning opportunities on at least 30 nonschooldays.

(2) Local educational agencies operating expanded learning opportunity programs pursuant to this section may operate a before school component of a program, an after school component of a program, or both the before and after school components of a program, on one or multiple schoolsites, and shall comply with subdivisions (c), (d), and (g) of Section 8482.3, including the development of a program plan based on all of the following:

(A) The department's guidance.

(B) Section 8482.6.

(C) Paragraphs (1) to (9), inclusive, and paragraph (12) of subdivision (c) of Section 8483.3.

(D) Section 8483.4, except that programs serving transitional kindergarten or kindergarten pupils shall maintain a pupil-to-staff member ratio of no more than 10 to 1.

(3) Local educational agencies shall prioritize services provided pursuant to this section at schoolsites in the lowest income communities, as determined by prior year percentages of pupils eligible for free and reduced-price meals, while maximizing the number of schools and neighborhoods with expanded learning opportunity programs across their attendance area.

(4) Local educational agencies may serve all pupils, including elementary, middle, and secondary school pupils, in expanded learning opportunity programs provided pursuant to this section.

(5) Local educational agencies may charge pupil fees for expanded learning opportunity programs provided pursuant to this section, consistent with Section 8482.6.

(6) Local educational agencies are encouraged to collaborate with community-based organizations and childcare providers, especially those participating in state or federally subsidized childcare programs, to maximize the number of expanded learning opportunity programs offered across their attendance areas.

(7) This section does not limit parent choice in choosing a care provider or program for their child outside of the required instructional minutes provided during a schoolday. Pupil participation in an expanded learning opportunity program is optional. Children eligible for an expanded learning opportunity program may participate in, and generate reimbursement for, other state or federally

Section 46120 Expanded learning opportunities program

2021-22 and 2022-23 school years: all classroom-based schools must offer to all unduplicated TK-6 pupils, and provide to at least 50% of enrolled unduplicated TK-6 pupils

Commencing in 2023-24 school year: classroom-based schools with 75% or more unduplicated pupils must offer to all TK-6 pupils, and provide to any pupil upon request

Commencing in 2023-24 school year: all other classroom-based schools must offer to all unduplicated TK-6 pupils, and provide to any unduplicated pupil upon request
Nine hours of combined instructional time and expanded learning opportunities per instructional day

Intersessions

Frontier designated geographical locations

Compliance with ASES program requirements

Program plan

Pupil to staff ratio

Prioritization

Fees according to ASES program requirements

Pupil participation is optional

Section 46120
Expanded learning
opportunities program
(continued)

Staff development

subsidized childcare programs, pursuant to the statutes regulating those programs.

(8) Local educational agencies may provide up to three days of staff development during regular expanded learning opportunity program hours.

(9) For a local educational agency that is temporarily prevented from operating its expanded learning opportunity program because of a school or program site closure due to emergency conditions listed in Section 41422 or subdivision (d) of Section 8482.8, and is not able to meet all of the requirements pursuant to paragraph (1), which is in fact shown by a resolution adopted by the governing board or body of the local educational agency, in addition to documentation substantiating the need for closure, the local educational agency shall not be subject to the penalty required pursuant to paragraphs (1) to (3), inclusive, of subdivision (c) as a result of the emergency.

(10) (A) An expanded learning opportunity program shall not be required to comply with the requirements of Chapter 2 (commencing with Section 8200) of Part 6 of Division 1 of Title 1 or the requirements set forth in Chapter 19 of Division 1 of Title 5 of the California Code of Regulations.

(B) Notwithstanding any other law, an expanded learning opportunity program operating pursuant to this section may operate without obtaining a child daycare facility license or special permit pursuant to Chapter 3.4 (commencing with Section 1596.70) of, and Chapter 3.5 (commencing with Section 1596.90) of, Division 2 of the Health and Safety Code. An expanded learning opportunity program shall not receive any additional funding pursuant to this subparagraph.

(C) Notwithstanding subparagraph (B), an expanded learning opportunity program operated by a third party that holds a child daycare facility license or special permit pursuant to Chapter 3.4 (commencing with Section 1596.70) of, and Chapter 3.5 (commencing with Section 1596.90) of, Division 2 of the Health and Safety Code, as of June 1, 2023, shall maintain that license or permit capacity as a requirement of contracting pursuant to this section until June 30, 2024. An expanded learning opportunity program shall not receive any additional funding pursuant to this subparagraph.

(D) Nothing in this section exempts an expanded learning opportunity program operating pursuant to this section from complying with the child daycare facility license requirements set forth in Chapter 3.4 (commencing with Section 1596.70) of, and Chapter 3.5 (commencing with Section 1596.90) of, Division 2 of the Health and Safety Code when serving children who do not participate in the After School Education and Safety Program (Article 22.5 (commencing with Section 8482) of Chapter 2 of Part 6 of Division 1 of Title 1), 21st Century Community Learning Centers (Article 22.6 (commencing with Section 8484.7) of Chapter 2 of Part 6 of Division 1 of Title 1), or the Expanded Learning Opportunities Program pursuant to this section. If multiple funding sources are used to serve pupils in an expanded learning opportunity program, a conflict in program requirements shall be resolved in favor of the funding source with the stricter requirements.

Audit

(c) (1) Commencing with the 2023–24 fiscal year, a local educational agency shall be subject to the audit conducted pursuant to Section 41020 to determine compliance with subdivision (b).

Fiscal penalties for failure to offer or provide

(2) Commencing with the 2023–24 fiscal year, if a local educational agency either fails to offer or provide access to expanded learning opportunity programs to eligible pupils pursuant to paragraph (1) of subdivision (b), the Superintendent shall withhold from the local educational agency's apportionment of funds pursuant to subdivision (d) an amount proportionate to the number of pupils to whom the local educational agency failed to offer or provide access to expanded learning opportunity programs. Pupils opting not to participate in the expanded learning opportunity program shall not generate a penalty for a local educational agency pursuant to this paragraph.

(3) (A) Commencing with the 2023–24 fiscal year, if a school district fails to maintain the required number of days or hours described in subparagraphs (A) to (C), inclusive, of paragraph (1) of subdivision (b), the Superintendent shall withhold from the school district's apportionment of funds pursuant to subdivision (d), as adjusted pursuant to paragraph (2), an amount equal to the product of 0.0048 times the school district's apportionment for each day the school district fails to meet the day or hour requirements.

(B) Commencing with the 2023–24 fiscal year, if a charter school fails to maintain the required number of days or hours described in subparagraphs (A) to (C), inclusive, of paragraph (1) of subdivision (b), the Superintendent shall withhold from the charter school's apportionment of funds pursuant to subdivision (d), as adjusted pursuant to paragraph (2), an amount equal to the product of 0.0049 times the charter school's apportionment for each day the charter school fails to meet the day or hour requirements.

Automatic allocation of grant funds for classroom-based schools serving TK-6
2021-22 allocation

(d) (1) The Superintendent shall allocate funding appropriated in Item 6100-110-0001 of the annual Budget Act and in subdivision (h), if applicable, in the following manner:

(A) For the 2021–22 fiscal year, for local educational agencies with a prior fiscal year local control funding formula unduplicated pupil percentage calculated pursuant to paragraph (5) of subdivision (b) of Section 42238.02 of equal to or greater than 80 percent, the amount of one thousand one hundred seventy dollars (\$1,170) per unit of the local educational agency's prior fiscal year second period reported kindergarten and grades 1 to 6, inclusive, classroom-based average daily attendance multiplied by the local educational agency's unduplicated pupil

Section 46120
Expanded learning
opportunities program
(continued)

percentage. Prior fiscal year average daily attendance and unduplicated pupil percentage shall be considered final as of the second principal apportionment for that fiscal year.

(B) Commencing with the 2022–23 fiscal year, for local educational agencies with a prior fiscal year local control funding formula unduplicated pupil percentage calculated pursuant to paragraph (5) of subdivision (b) of Section 42238.02 of equal to or greater than 75 percent, the amount of two thousand seven hundred fifty dollars (\$2,750) per unit of the local educational agency's prior fiscal year second period reported kindergarten and grades 1 to 6, inclusive, classroom-based average daily attendance multiplied by the local educational agency's unduplicated pupil percentage. Prior fiscal year average daily attendance and unduplicated pupil percentage shall be considered final as of the second principal apportionment for that fiscal year.

(C) For all other local educational agencies not receiving an allocation under subparagraph (A) or (B), the amount of funds remaining from the appropriations in Item 6100-110-0001 of the annual Budget Act and subdivision (h), if applicable, after the amount allocated pursuant to subparagraph (A) or (B), shall be allocated on a per-unit basis of the local educational agency's prior year second period reported kindergarten and grades 1 to 6, inclusive, classroom-based average daily attendance multiplied by the local educational agency's unduplicated pupil percentage. Prior year average daily attendance and unduplicated pupil percentage shall be considered final as of the second principal apportionment for that fiscal year.

(2) A local educational agency with prior year classroom-based average daily attendance in kindergarten and grades 1 to 6, inclusive, shall not receive funding pursuant to paragraph (1) of less than fifty thousand dollars (\$50,000).

(3) Funds provided to a local educational agency pursuant to paragraph (1) shall be used to support pupil access to expanded learning opportunity programs, which may include, but is not limited to, hiring literacy coaches, high-dosage tutors, school counselors, and instructional day teachers and aides to assist pupils as part of the local educational agency's program enrichment activities.

(4) A local educational agency receiving funding pursuant to subparagraph (B) of paragraph (1) shall be provided at least three years of funding pursuant to that subparagraph upon becoming eligible to receive funding pursuant to that subparagraph. A local educational agency that does not meet the requirements of subparagraph (B) of paragraph (1) for four consecutive years shall be ineligible to receive funding pursuant to that subparagraph.

(5) The Superintendent shall proportionately reduce the amount of funding allocated pursuant to this section for a charter school that has ceased operation during the school year if school was actually taught in the charter school on fewer than 175 calendar days during that school year. The reduction shall be commensurate to the number of days that the charter school failed to operate due to the closure.

(6) For the 2021–22 fiscal year, a school district or charter school may expend or encumber the funds received pursuant to this subdivision from the 2021–22 fiscal year to the 2023–24 fiscal year, inclusive. For the 2022–23 fiscal year, a school district or charter school may expend or encumber the funds received pursuant to this subdivision from the 2022–23 and 2023–24 fiscal years.

(7) (A) For reorganized school districts, the prior fiscal year percentage of unduplicated pupils for purposes of paragraph (1) shall be calculated as follows:

(i) For a new or acquiring school district that has reorganized pursuant to paragraph (1), (2), or (3) of subdivision (a), or subdivision (b), of Section 35511, formed by all of two or more existing districts, combine the unduplicated pupils and total pupil enrollment of the original school districts.

(ii) For a new or acquiring school district that has reorganized pursuant to paragraph (1), (2), or (3) of subdivision (a), or subdivision (b), of Section 35511, formed by parts of one or more existing districts, and for the remaining portion of a divided district, or for a new school district formed as a result of a deunification pursuant to paragraph (4) of subdivision (a) of Section 35511, the county office of education with jurisdiction over the reorganized school district may provide to the department, under timelines and procedures established by the Superintendent, the unduplicated pupils and total pupil enrollment for the prior three fiscal years from each affected school district that will be served by each reorganized district, and the prior fiscal year unduplicated pupil percentage may be based on the unduplicated pupils and total pupil enrollment attributed to each reorganized school district. If the county office of education with jurisdiction over the reorganized school district does not provide to the department the unduplicated pupils and total pupil enrollment for the prior three fiscal years from each affected school district that will be served by each reorganized school district, the unduplicated pupils and total pupil enrollment shall be equal to the counts reported for the original school district.

(B) For reorganized school districts, the prior fiscal year average daily attendance for purposes of paragraph (1) shall be calculated as follows:

(i) For a new or acquiring school district that has reorganized pursuant to paragraph (1), (2), or (3) of subdivision (a), or subdivision (b), of Section 35511, the sum of the average daily attendance of the original school districts.

(ii) For a remaining portion of a divided school district, the average daily attendance attributed to that portion of the school district.

2022-23 allocation for schools with 75% or more unduplicated pupils

2022-23 allocation for all other schools

Use of funds

Expenditure deadlines

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Expanded learning
opportunities program
(continued)

(iii) For a new school district formed as a result of a deunification pursuant to paragraph (4) of subdivision (a) of Section 35511, the average daily attendance of the former school district shall be attributed to the new school districts so that the sum of the average daily attendance for the new school districts equals the average daily attendance of the former school district.

(iv) For purposes of clauses (i), (ii), and (iii), the county superintendent of schools with jurisdiction over the reorganized school district shall provide to the department the prior fiscal year average daily attendance as of the second principal apportionment from each affected school district that will be served by each reorganized district.

(8) (A) Beginning with the 2022–23 fiscal year, the department may allocate up to five million dollars (\$5,000,000) of moneys appropriated for purposes of this subdivision to county offices of education to provide technical assistance, evaluation, and training services to support program improvement, in coordination with activities described in Section 8483.55. County offices of education already providing technical assistance pursuant to Section 8483.55 shall be prioritized to receive these funds.

(B) Training and support shall include, but is not limited to, supporting local educational agencies with leveraging multiple funding initiatives to support expanded learning, including, but not limited to, community schools, school meal programs, and California state preschool programs.

(e) Commencing with the 2023–24 school year, the Superintendent, in consultation with the State Department of Social Services, shall establish a process and a timeline for local educational agencies that contract with third-party providers to operate expanded learning opportunity programs at a location other than a local educational agency's school campus pursuant to this section, and California state preschool program providers pursuant to Chapter 2 (commencing with Section 8200) of Part 6 of Division 1 of Title 1, to annually submit program access information to the department, which shall distribute a compiled list to the State Department of Social Services for purposes of Community Care Licensing Division data collection and submission to the local educational agency's applicable resource and referral agency. Information required to be submitted under this subdivision shall include, but not be limited to, all of the following:

(1) The name, address, and telephone number of each third party.

(2) The number of pupils being served by each third party, as well as the grade levels of those pupils.

(3) The State Department of Social Services child daycare facility license number of each third party, if applicable.

(4) A single point of contact for each local educational agency regarding expanded learning opportunity programs.

(f) By February 1, 2024, the Superintendent, in consultation with the State Department of Social Services, shall submit a report to the relevant fiscal and policy committees of the Legislature that includes all of the following:

(1) The number of expanded learning providers who are operating an expanded learning opportunity program for pupils enrolled in transitional kindergarten and kindergarten on a nonlocal educational agency site during the fiscal year, and how many pupils are provided access to these programs.

(2) The number of expanded learning providers who are operating an expanded learning opportunity program for pupils enrolled in transitional kindergarten and kindergarten on a nonlocal educational agency site during nonschooldays, and how many pupils are provided access to these programs.

(3) The number of expanded learning providers who are operating an expanded learning opportunity program for pupils enrolled in transitional kindergarten and kindergarten on a nonlocal educational agency site in the 2023–24 fiscal year who are also licensed by the State Department of Social Services for purposes of community care licensing, the type of programs that are licensed by the State Department of Social Services for purposes of community care licensing, and how many pupils are provided access to their programs.

(4) A list of local educational agencies that contract with third-party providers that provide access to pupils on a nonlocal educational agency site during the fiscal year, how many contractors they work with, and the number of pupils provided access to these programs, by grade.

(5) A list of local educational agencies that contract with third-party providers that provide access to pupils on a nonlocal educational agency site during nonschooldays, how many contractors they work with, and the number of pupils provided access to these programs, by grade.

(g) For purposes of this section, the following definitions apply:

(1) "Expanded learning opportunities" has the same meaning as "expanded learning" is defined in Section 8482.1. "Expanded learning opportunities" does not mean an extension of instructional time, but rather, opportunities to engage pupils in enrichment, play, nutrition, and other developmentally appropriate activities.

(2) "Frontier designated geographic location" means a schoolsite in an area that has a population density of less than 11 persons per square mile.

(3) "Local educational agency" means a school district or charter school, excluding a charter school established pursuant to Section 47605.5.

Program definitions

(4) "Nonschooldays" means days not identified pursuant to subparagraph (A) of paragraph (1) of subdivision (b), inclusive of Saturdays, as described in Section 37223.

(5) "Offer access" means to recruit, advertise, publicize, or solicit through culturally and linguistically effective and appropriate communication channels.

(6) "Provide access," with respect to an "expanded learning opportunity program," means to enroll in the expanded learning opportunity program. If a parent or guardian has a signed expanded learning opportunity program registration form and that form is on file, the pupil shall be considered enrolled in the expanded learning opportunity program. For a local educational agency receiving an expanded learning opportunity program apportionment, transportation shall be provided for any pupil who attends a school that is not operating an expanded learning opportunity program to attend a location that is providing an expanded learning opportunity program and to return to their original location or another location that is established by the local educational agency.

(7) "Unduplicated pupil" has the same meaning as in Section 42238.02.

(h) For the 2021–22 fiscal year, the sum of seven hundred fifty-four million twenty-one thousand dollars (\$754,021,000) is hereby appropriated from the General Fund to the Superintendent for allocation for the Expanded Learning Opportunities Program in the manner and for the purpose set forth in this section.

(i) For purposes of making the computations required by Section 8 of Article XVI of the California Constitution, the appropriation made by subdivision (h) shall be deemed to be "General Fund revenues appropriated for school districts," as defined in subdivision (c) of Section 41202, for the 2020–21 fiscal year, and included within the "total allocations to school districts and community college districts from General Fund proceeds of taxes appropriated pursuant to Article XIII B," as defined in subdivision (e) of Section 41202, for the 2020–21 fiscal year.

FUNDING IN EMERGENCY CONDITIONS: ADA SHORTFALLS (J-13A)
Education Code

(a) If the average daily attendance of a school district, county office of education, or charter school during a fiscal year has been materially decreased during a fiscal year because of any of the following, the fact shall be established to the satisfaction of the Superintendent by affidavits of the members of the governing board or body of the school district, county office of education, or charter school and the county superintendent of schools:

- (1) Fire.
- (2) Flood.
- (3) Impassable roads.
- (4) Epidemic.
- (5) Earthquake.
- (6) The imminence of a major safety hazard as determined by the local law enforcement agency.
- (7) A strike involving transportation services to pupils provided by a nonschool entity.
- (8) An order provided for in Section 41422.

(b) (1) In the event a state of emergency is declared by the Governor in a county, a decrease in average daily attendance in the county below the approximate total average daily attendance that would have been credited to a school district, county office of education, or charter school had the state of emergency not occurred shall be deemed material. The Superintendent shall determine the length of the period during which average daily attendance has been reduced by the state of emergency.

(2) The period determined by the Superintendent shall not extend into the next fiscal year following the declaration of the state of emergency by the Governor, except upon a showing by a school district, county office of education, or charter school, to the satisfaction of the Superintendent, that extending the period into the next fiscal year is essential to alleviate continued reductions in average daily attendance attributable to the state of emergency.

(3) Notwithstanding any other law, the Superintendent shall extend through the 2018–19 fiscal year the period during which it is essential to alleviate continued reductions in average daily attendance attributable to a state of emergency declared by the Governor in October 2017, for a school district where no less than 5 percent of the residences within the school district or school district facilities were destroyed by the qualifying emergency.

(c) (1) The average daily attendance of the school district, county office of education, or charter school for the fiscal year shall be estimated by the Superintendent in a manner that credits to the school district, county office of education, or charter school for determining the apportionments to be made to the school district, county office of education, or charter school from the State School Fund approximately the total average daily attendance that would have been credited to the school district, county office of education, or charter school had the emergency not occurred or had the order not been issued.

(2) (A) From September 1, 2021, to June 30, 2022, inclusive, with the exception of a material loss of attendance for pupils who are individuals with exceptional needs, as defined in Section 56026, whose individualized education program developed pursuant to Article 3 (commencing with Section 56340) of Chapter 4 of Part 30 does not specifically provide for participation in independent study or pupils

Section 46392
ADA adjustments and credits under
extraordinary circumstances

No J-13A for ADA loss due to
COVID-19 quarantine

Section 46392

ADA adjustments and credits under extraordinary circumstances
(continued)

ADA credit for certain COVID-19 impacts

Conditions for ADA credit

Quarantine due to COVID-19

Certificated staff shortages

Classified staff shortages

Calculations for charter schools

who are enrolled in community day schools pursuant to Article 3 (commencing with Section 48660) of Chapter 4 of Part 27, a school district, county office of education, or charter school shall not receive average daily attendance credit pursuant to this section for pupils that have been quarantined and are unable to attend in-person instruction due to exposure to, or infection with, COVID-19 pursuant to local or state public health guidance.

(B) Notwithstanding subparagraph (A), from September 1, 2021, to June 30, 2022, inclusive, a school district, county office of education, or charter school may receive average daily attendance credit pursuant to this section for school closures related to impacts from COVID-19 or material loss of attendance due to COVID-19 related staffing shortages if the following conditions are established to the satisfaction of the Superintendent by affidavits of the members of the governing board or body of the school district, county office of education, or charter school and the county superintendent of schools:

(i) The school district, county office of education, or charter school is unable to provide in person instruction to pupils due to staffing shortages as a result of staff quarantine due to exposure to, or infection with, COVID-19 pursuant to local or state public health guidance.

(ii) For certificated staff shortages, the school district, county office of education, or charter school has exhausted all options for obtaining staff coverage, including using all certificated staff and substitute teacher options, and has consulted with their county office of education and the Superintendent in determining that staffing needs cannot be met through any option.

(iii) For classified staff shortages, the school district, county office of education, or charter school has exhausted all options for obtaining staff coverage, including using all staff options, and has consulted with their county office of education and the Superintendent in determining that staffing needs cannot be met through any option.

(d) Notwithstanding any other law, for a school district or charter school physically located within a school district, where no less than 5 percent of the residences within the school district, or the school district's facilities, were destroyed as a result of a state of emergency that was declared by the Governor in November 2018, all of the following shall apply:

(1) (A) In the 2020–21 fiscal year, for school districts, the Superintendent shall calculate the difference between the school district's certified second principal apportionment local control funding formula entitlement pursuant to Section 42238.02 in the 2020–21 fiscal year and the 2019–20 fiscal year and, if there is a difference, allocate the amount of that difference to the school district.

(B) In the 2021–22 fiscal year, for school districts, the Superintendent shall allocate an amount equal to 25 percent of the difference calculated in subparagraph (A) to the school district.

(C) In the 2022–23 fiscal year, for school districts, the Superintendent shall allocate an amount equal to 12.5 percent of the difference calculated in subparagraph (A) to the school district.

(2) (A) In the 2019–20 and 2020–21 fiscal years, for charter schools, the Superintendent shall calculate the difference between the charter school's certified second principal apportionment local control funding formula entitlement pursuant to 42238.02 in the current year and each respective prior year and, if there is a difference, allocate the amount of that difference to the charter school.

(B) In the 2021–22 fiscal year, for charter schools that operate a minimum of 175 school days and report at least 75 percent of the total second period average daily attendance for the 2019–20 fiscal year, as described in Section 41601, the Superintendent shall allocate 25 percent of the difference calculated in subparagraph (A) to the charter school.

(3) For a county office of education funded pursuant to paragraph (1) of subdivision (g) of Section 2575 that has within the boundaries of the county school districts or charter schools affected pursuant to this subdivision and that has in the schools operated by the county office of education at least a 10-percent decrease in average daily attendance in the current fiscal year, in the 2019–20 and 2020–21 fiscal years, the Superintendent shall calculate the difference between the county office of education's alternative education grant entitlement certified at the annual principal apportionment pursuant to Section 2574 in the current fiscal year and each respective prior fiscal year and, if there is a difference, allocate the amount of that difference to the county office of education.

(4) A school district may transfer funds received pursuant to paragraph (1) to the county office of education for the portion of the funds that represents pupils served by the county office of education who are funded through the school district's local control funding formula apportionment pursuant to Section 2576.

(5) In each fiscal year, the allocations pursuant to this subdivision shall be made to school districts and charter schools by the Superintendent as soon as practicable after the second principal apportionment and to county offices of education as soon as practicable after the annual principal apportionment. The allocations made shall be final. The Superintendent may provide a preliminary allocation of up to 50 percent no sooner than the first principal apportionment.

(6) (A) The amounts described in this subdivision shall be continuously appropriated from the General Fund to the Superintendent for these purposes.

(B) For purposes of making the computations required by Section 8 of Article XVI of the California Constitution, the appropriation made by this subdivision shall be deemed to be "General Fund revenues appropriated for school districts," as defined in subdivision (c) of Section 41202, for the fiscal year in which they are appropriated, and included within the "total allocations to school districts and community college districts from General Fund proceeds of taxes appropriated pursuant to Article XIII B," as defined in subdivision (e) of Section 41202.

(e) Notwithstanding any other law, for a school district or charter school physically located within a

school district, where no less than 5 percent of the residences within the school district, or the school district's facilities, were destroyed as a result of a state of emergency that was declared by the Governor in September 2020, all of the following shall apply:

(1) For the 2021–22 fiscal year, for school districts, the Superintendent shall calculate the difference between the school district's certified annual principal apportionment local control funding formula revenues pursuant to Section 42238.02 in the 2021–22 fiscal year and the 2019–20 fiscal year, including local revenue, pursuant to subdivision (j) of Section 42238.02, and any additional funds received pursuant to subdivision (e) of Section 42238.03 in excess of the entitlement calculated pursuant to Section 42238.02 and 42238.03 and, if there is a difference, allocate the amount of that difference to the school district.

(2) For the 2021–22 fiscal year, for charter schools that operate a minimum of 175 school days and report at least 75 percent of the total second period average daily attendance for the 2019–20 fiscal year, as described in Section 41601, the Superintendent shall calculate the difference between the charter school's certified second principal apportionment local control funding formula revenues pursuant to Section 42238.02 in the 2021–22 fiscal year and the 2019–20 fiscal year, and, if there is a difference, allocate the amount of that difference to the charter school.

(3) School districts and charter schools shall notify the Superintendent of their eligibility pursuant to this subdivision by November 1, 2021, in the manner prescribed by the Superintendent.

(4) Preliminary allocations made pursuant to paragraph (1) shall be made to school districts by the Superintendent through the principal apportionment beginning with the 2021–22 fiscal year first principal apportionment certification and shall be made final as of the annual principal apportionment.

(5) Allocations pursuant to paragraph (2) shall be made to charter schools by the Superintendent as soon as practicable after the second principal apportionment and shall be made final as of the annual principal apportionment. The Superintendent may provide a preliminary allocation of up to 50 percent no sooner than the first principal apportionment.

(f) Notwithstanding any other law, for a school district where a school eligible for funding pursuant to Article 4 (commencing with Section 42280) of Chapter 7 of Part 24 of Division 3 was destroyed as a result of a state of emergency that was declared by the Governor in August 2021, the following shall apply:

(1) The school district may continue to report the amount of attendance generated by pupils enrolled in another school of the school district that would have otherwise attended the destroyed school, and the number of full-time teachers employed by the school district that would have otherwise provided instructional services at the school, as if the school were operational in the 2021–22, 2022–23, and 2023–24 fiscal years.

(2) The school shall be considered a necessary small school for the purpose of Section 42282 in the 2022–23 and 2023–24 fiscal years.

(g) This section applies to any average daily attendance that occurs during any part of a school year.

(a) (1) The Legislature finds and declares that, given the effects of public health emergencies and the significant and growing number of natural disasters that the state has faced in recent years, there is an increased need for local educational agencies to provide instructional continuity for pupils when conditions make in-person instruction infeasible for all or some pupils, and that maintaining access to instruction during a natural disaster or emergency is crucial in mitigating the negative impacts of lost learning time and supporting pupil mental health.

(2) It is the intent of the Legislature that all local educational agencies have plans in place to keep pupils learning in the event of school closures or absences, especially by being prepared to shift to independent study-based online learning options, if necessary. While the first priority will always be to get pupils back to in-person instruction as quickly as possible following a natural disaster or other emergency event, schools should have the infrastructure in place to move instruction online and ensure that pupils can access that instruction at short notice. Best practices like including independent study agreements in back-to-school paperwork provided pursuant to Section 48980 for parents to sign ahead of time, posting assignments and pupil academic resources online, assigning laptops to all pupils, developing emergency partnerships with neighboring local educational agencies, and maintaining an online instructional platform can help local educational agencies be better prepared to shift to independent study-based online learning options if the need arises.

(b) For affidavits submitted to the Superintendent for events occurring after September 1, 2021, that resulted in a school closure or material decrease in attendance, a school district, county office of education, or charter school that provides an affidavit to the Superintendent, pursuant to Section 41422 or 46392, shall certify that it has a plan for which independent study will be offered to pupils, pursuant to Article 5.5 (commencing with Section 51745) of Chapter 5 of Part 28 of Division 4. The plan shall comply with all of the following:

(1) Independent study is offered to any pupil impacted by any of the conditions listed in Section 46392 within 10 days of the first day of a school closure or material decrease in attendance. Pupils who are individuals with exceptional needs shall receive the services identified in their individualized education programs pursuant to paragraph (9) of subdivision (a) of Section 56345

Section 46393
Plan for independent study
(continued)

and may participate in an independent study program.

(2) Require reopening for in-person instruction as soon as possible unless prohibited under the direction of the local or state health officer.

(3) Notwithstanding subdivision (c) of Section 51745 or subparagraph (F) of paragraph (9) of subdivision (g) of Section 51747, include information regarding establishing independent study master agreements in a reasonable amount of time.

(c) (1) Notwithstanding subdivision (b), the plan is not required to comply with subdivision (d), (e), or (f) of Section 51747 for school closures or a material decrease in attendance for 15 days or less for affected pupils.

(2) Notwithstanding subdivision (b), the plan is not required to comply with subdivision (d), (e), or (f) of Section 51747 if the school district or county office of education has a waiver of the requirement to offer independent study pursuant to subdivision (g) of Section 51745.

(d) A copy of the plan and, if applicable, the state or local public health or public safety order that required school closure shall accompany the affidavit provided to the Superintendent described in subdivision (b).

KINDERGARTEN AND TRANSITIONAL KINDERGARTEN (TK)
Education Code

Section 48000
Kindergarten and TK admissions
and requirements

(a) A child shall be admitted to a kindergarten maintained by the school district at the beginning of a school year, or at a later time in the same year, if the child will have their fifth birthday on or before one of the following dates:

(1) December 2 of the 2011–12 school year.

(2) November 1 of the 2012–13 school year.

(3) October 1 of the 2013–14 school year.

(4) September 1 of the 2014–15 school year and each school year thereafter.

(b) The governing board of the school district of a school district maintaining one or more kindergartens may, on a case-by-case basis, admit to a kindergarten a child having attained the age of five years at any time during the school year with the approval of the parent or guardian, subject to the following conditions:

(1) The governing board of the school district determines that the admittance is in the best interests of the child.

(2) The parent or guardian is given information regarding the advantages and disadvantages and any other explanatory information about the effect of this early admittance.

TK admission birthdates

(c) (1) As a condition of receipt of apportionment for pupils in a transitional kindergarten program pursuant to Section 46300, and Chapter 3 (commencing with Section 47610) of Part 26.8, as applicable, a school district or charter school shall ensure the following:

(A) In the 2012–13 school year, a child who will have their fifth birthday between November 2 and December 2 shall be admitted to a transitional kindergarten program maintained by the school district or charter school.

(B) In the 2013–14 school year, a child who will have their fifth birthday between October 2 and December 2 shall be admitted to a transitional kindergarten program maintained by the school district or charter school.

(C) From the 2014–15 school year to the 2021–22 school year, inclusive, a child who will have their fifth birthday between September 2 and December 2 shall be admitted to a transitional kindergarten program maintained by the school district or charter school.

(D) In the 2022–23 school year, a child who will have their fifth birthday between September 2 and February 2 shall be admitted to a transitional kindergarten program maintained by the school district or charter school.

(E) In the 2023–24 school year, a child who will have their fifth birthday between September 2 and April 2 shall be admitted to a transitional kindergarten program maintained by the school district or charter school.

(F) In the 2024–25 school year, a child who will have their fifth birthday between September 2 and June 2 shall be admitted to a transitional kindergarten program maintained by the school district or charter school.

(G) In the 2025–26 school year, and in each school year thereafter, a child who will have their fourth birthday by September 1 shall be admitted to a transitional kindergarten program maintained by the school district or charter school.

(2) (A) In any school year, a school district or charter school may, at any time during a school year, admit a child to a transitional kindergarten program who will have their fifth birthday after the date specified for the applicable year in subparagraphs (A) to (F), inclusive, of paragraph (1) but during that same school year, with the approval of the parent or guardian, subject to the following conditions:

(i) The governing board of the school district or the governing body of the charter school determines that the admittance is in the best interests of the child.

(ii) The parent or guardian is given information regarding the advantages and disadvantages and any other explanatory information about the effect of this early admittance.

Section 48000
Kindergarten and TK admissions
and requirements
(continued)

(B) Notwithstanding any other law, a pupil admitted to a transitional kindergarten program pursuant to subparagraph (A) shall not generate average daily attendance for purposes of Section 46300, or be included in the enrollment or unduplicated pupil count pursuant to Section 42238.02, until the pupil has attained the pupil's fifth birthday, regardless of when the pupil was admitted during the school year.

(d) For purposes of this section, "transitional kindergarten" means the first year of a two-year kindergarten program that uses a modified kindergarten curriculum that is age and developmentally appropriate.

(e) A transitional kindergarten shall not be construed as a new program or higher level of service.

(f) It is the intent of the Legislature that transitional kindergarten curriculum be aligned to the California Preschool Learning Foundations developed by the department.

(g) As a condition of receipt of apportionment for pupils in a transitional kindergarten program pursuant to Section 46300, a school district or charter school shall do all of the following:

(1) Maintain an average transitional kindergarten class enrollment of not more than 24 pupils for each schoolsite. For purposes of this calculation, the following shall apply for each schoolsite of a school district or charter school:

(A) "Class" means a group of pupils scheduled to report regularly at a particular time to a particular teacher during the regular schoolday, as defined by the governing board of the school district or the governing body of the charter school, as applicable, excluding special day classes. Classes in the evening and summer school class shall not be considered classes for purposes of this calculation.

(B) (i) "Active enrollment count" for purposes of subparagraph (C) means the count of all pupils enrolled in a class with transitional kindergarten pupils on the first day of the school year on which the class was in session, plus all later enrollees, minus all withdrawals since that first day. An active enrollment count shall be made on the last teaching day of each school month that ends before April 15 of the school year.

(ii) For school districts, active enrollment count shall not include pupils enrolled in independent study pursuant to Article 5.5 (commencing with Section 51744) of Chapter 5 of Part 28 who meet the minimum day requirements for independent study and are continually enrolled in independent study for more than 14 schooldays in a school year.

(iii) For charter schools, active enrollment count shall not include pupils enrolled in independent study pursuant to Article 5.5 (commencing with Section 51744) of Chapter 5 of Part 28 who are continually enrolled in independent study for more than 14 schooldays on any of the days on which school is taught for the purpose of meeting the 175-instructional-day offering, as described in Section 11960 of Title 5 of the California Code of Regulations.

(C) "Average number of pupils enrolled per class" means the quotient of the sum of the active enrollment counts made under subparagraph (B) divided by the total number of those active enrollment counts for each class of the schoolsite.

(D) "Average transitional kindergarten class enrollment" means the quotient of the sum of the average number of pupils enrolled per class determined pursuant to subparagraph (C) of all classes at the schoolsite divided by the total number of all classes at the schoolsite that include transitional kindergarten pupils, rounded to the nearest half or whole integer.

(2) Commencing with the 2022–23 school year, maintain an average of at least one adult for every 12 pupils for transitional kindergarten classrooms at each schoolsite. For purposes of this calculation, the following shall apply for each schoolsite of a school district or charter school:

(A) "Total transitional kindergarten enrollment" is the sum of the average number of pupils enrolled per class of all classes at the schoolsite, as determined in subparagraph (C) of paragraph (1).

(B) "Number of adults" shall be determined for each schoolsite as follows:

(i) A count of employees of the school district or charter school assigned to each class at the schoolsite that includes transitional kindergarten pupils shall be made on the last teaching day of each school month that ends before April 15 of the school year.

(ii) The sum of all of the adult counts pursuant to clause (i) shall be divided by the total number of those counts, rounded to the nearest half or whole integer.

(C) "Adult-to-pupil ratio" shall be the quotient of the total transitional kindergarten enrollment divided by the total number of adults, rounded to the nearest half or whole integer.

(3) (A) Commencing with the 2025–26 school year, and for each year thereafter, maintain an average of at least one adult for every 10 pupils for transitional kindergarten classrooms.

(B) It is the intent of the Legislature to appropriate funds for purposes of this paragraph.

(4) Ensure that credentialed teachers who are first assigned to a transitional kindergarten classroom after July 1, 2015, have, by August 1, 2023, one of the following:

(A) At least 24 units in early childhood education, or childhood development, or both.

(B) As determined and documented by the local educational agency employing the teacher, professional experience in a classroom setting with preschool age children meeting the criteria established by the governing board or body of the local educational agency that is comparable to the 24 units of education described in subparagraph (A).

(C) A child development teacher permit, or an early childhood education specialist credential, issued by the Commission on Teacher Credentialing.

Transitional kindergarten defined

TK ratios

Enrollment count excludes independent study

TK credentials

Section 48000
Kindergarten and TK admissions and requirements
(continued)

(h) A school district or charter school may place four-year-old children, as defined in Section 8205, enrolled in a California state preschool program into a transitional kindergarten program classroom. A school district or charter school that commingles children from both programs in the same classroom shall meet all of the requirements of the respective programs in which the children are enrolled, and the school district or charter school shall adhere to all of the following requirements, irrespective of the program in which the child is enrolled:

(1) An early childhood environment rating scale, as specified in Section 18281 of Title 5 of the California Code of Regulations, shall be completed for the classroom.

(2) All children enrolled for 10 or more hours per week shall be evaluated using the Desired Results Developmental Profile, as specified in Section 18272 of Title 5 of the California Code of Regulations.

(3) The classroom shall be taught by a teacher that holds a credential issued by the Commission on Teacher Credentialing in accordance with Section 44065 and subdivision (b) of Section 44256 and who meets the requirements set forth in subdivision (g).

(4) The classroom shall be in compliance with the adult-child ratio specified in subdivision (c) of Section 8241.

(5) Contractors of a school district or charter school commingling children enrolled in the California state preschool program with children enrolled in a transitional kindergarten program classroom shall report the services, revenues, and expenditures for the California state preschool program children in accordance with Section 18068 of Title 5 of the California Code of Regulations. Those contractors are not required to report services, revenues, and expenditures for the children in the transitional kindergarten program.

(i) Until July 1, 2019, a transitional kindergarten classroom that has in attendance children enrolled in a California state preschool program shall be licensed pursuant to Chapter 3.4 (commencing with Section 1596.70) of, and Chapter 3.5 (commencing with Section 1596.90) of, Division 2 of the Health and Safety Code.

(j) A school district or charter school that chooses to place California state preschool program children into a transitional kindergarten program classroom shall not also include children enrolled in transitional kindergarten for a second year or children enrolled in kindergarten in that classroom.

(k) A child's eligibility for transitional kindergarten enrollment under paragraph (1) or (2) of subdivision (c) shall not impact family eligibility for a preschool or childcare program, including, but not limited to, all of the following:

(1) A Head Start or Early Head Start program, as defined by the federal Head Start Act, as amended (42 U.S.C. Sec. 9801 et seq.).

(2) A childcare center, family childcare home, or license-exempt provider serving children through an alternative payment program pursuant to Chapter 3 (commencing with Section 10225) of Part 1.8 of Division 9 of the Welfare and Institutions Code.

(3) A migrant childcare and development program serving children pursuant to Chapter 6 (commencing with Section 10235) of Part 1.8 of Division 9 of the Welfare and Institutions Code.

(4) A childcare center or family childcare home educational network serving children through a California state preschool program pursuant to Article 2 (commencing with Section 8207) of Chapter 2 of Part 6 of Division 1 of Title 1.

(5) A childcare center, family childcare home, or license-exempt provider serving children through a general childcare and development program pursuant to Chapter 7 (commencing with Section 10240) of Part 1.8 of Division 9 of the Welfare and Institutions Code.

(6) A family childcare home educational network serving children pursuant to Chapter 8 (commencing with Section 10250) of Part 1.8 of Division 9 of the Welfare and Institutions Code.

(7) Childcare and development services for children with special needs pursuant to Chapter 9 (commencing with Section 10260) of Part 1.8 of Division 9 of the Welfare and Institutions Code.

(8) A program serving children through a CalWORKs Stage 1, Stage 2, or Stage 3 program pursuant to Chapter 21 (commencing with Section 10370) of Part 1.8 of Division 9 of the Welfare and Institutions Code.

(l) (1) The Superintendent shall authorize California state preschool program contracting agencies to offer less than four hours each instructional day of wraparound childcare services within a part-day California state preschool program for children enrolled in an education program as a transitional kindergarten or kindergarten pupil, if their families meet the requirements of Section 8208.

(2) The Superintendent shall authorize California state preschool programs operating on a local education agency campus to operate a part-day California state preschool program that allows flexibility in the operational hours and enrollment cutoff dates to better align with the enrollment for the new school year.

(3) Notwithstanding the rulemaking provisions of the Administrative Procedure Act (Chapter 3.5 (commencing with Section 11340) of Part 1 of Division 3 of Title 2 of the Government Code) and Section 33308.5, until regulations are filed with the Secretary of State to implement this subdivision the department shall implement this subdivision, through management bulletins or similar letters of instruction on or before December 31, 2022.

(a) For the purposes of subparagraphs (A) and (B) of paragraph (4) of subdivision (g) of Section 48000, "units" means semester units, or their quarterly equivalent, as used for the purposes of a degree program at the University of California, California State University, California Community Colleges, or independent institutions of higher education, as defined in Section 66010.

(b) (1) Commencing with the 2022–23 school year, if a school district or charter school fails to comply with the requirements of paragraphs (1) to (4), inclusive, of subdivision (g) of Section 48000, the Superintendent shall withhold from the school district's or charter school's entitlement computed pursuant to Section 42238.02 the sum of the following:

(A) For school districts and charter schools that fail to meet the adult-to-pupil ratio requirements of paragraph (2) of subdivision (g) of Section 48000, the amount determined by multiplying:

(i) The number of additional adults needed to meet the requirements of paragraph (2) of subdivision (g) of Section 48000, as calculated by dividing the total transitional kindergarten enrollment at the schoolsite, as determined pursuant to subparagraph (A) of paragraph (2) of subdivision (g) of Section 48000, by 12, rounded to the nearest half or whole integer, minus the total number of adults at the schoolsite, as determined pursuant to subparagraph (B) of paragraph (2) of subdivision (g) of Section 48000.

(ii) Twenty-four, reduced by the statewide average rate of absence for elementary school districts for kindergarten and grades 1 to 8, inclusive, as calculated by the department for the prior fiscal year, with the resultant figures and rates rounded to the nearest tenth.

(iii) The per average daily attendance rate determined pursuant to paragraph (2) of subdivision (g) of Section 42238.02.

(B) For school districts and charter schools that fail to ensure that credentialed teachers who are first assigned to a transitional kindergarten classroom after July 1, 2015, have, by August 1, 2025, met one of the requirements of subparagraphs (A) to (C), inclusive, of paragraph (4) of subdivision (g) of Section 48000, the amount determined by multiplying:

(i) The number of credentialed teachers that did not meet the requirements of subparagraphs (A) to (C), inclusive, of paragraph (4) of subdivision (g) of Section 48000.

(ii) Twenty-four, reduced by the statewide average rate of absence for elementary school districts for kindergarten and grades 1 to 8, inclusive, as calculated by the department for the prior fiscal year, with the resultant figures and rates rounded to the nearest tenth.

(iii) The per average daily attendance rate pursuant to subparagraph (A) of paragraph (1) of subdivision (d) of Section 42238.02.

(iv) The quotient of the sum of all schooldays on which all teachers identified pursuant to clause (i) rendered any amount of service in a classroom with transitional kindergarten pupils without meeting the applicable requirements divided by the total days of instruction for those teachers.

(C) For school districts and charter schools that fail to maintain an average transitional kindergarten class enrollment of not more than 24 pupils for each schoolsite, as required pursuant to paragraph (1) of subdivision (g) of Section 48000, the amount determined by multiplying the then-current fiscal year's average daily attendance reported for the second principal apportionment period in transitional kindergarten by the amount specified in subparagraph (A) of paragraph (3) of subdivision (d) of Section 42238.02, unless the school district fails to meet the requirements for average class size for kindergarten and grades 1 to 3, inclusive, pursuant to clause (i) of subparagraph (D) of paragraph (3) of subdivision (d) of Section 42238.02.

(2) The requirements of paragraphs (1), (2), and (4) of subdivision (g) of Section 48000, and, if operative, the requirements of paragraph (3) of subdivision (g) of Section 48000, shall apply to any classroom providing instruction to pupils enrolled in a transitional kindergarten program.

(c) The Superintendent shall adjust an amount withheld pursuant to the requirements of subdivision (b) to ensure that the total amount withheld does not exceed the product of both of the following:

(1) The then-current fiscal year's average daily attendance reported for the second principal apportionment period in transitional kindergarten for the applicable school district or charter school.

(2) The sum of the per average daily attendance rates of all of the following:

(A) Subparagraph (A) of paragraph (1) of subdivision (d) of Section 42238.02.

(B) Subparagraph (A) of paragraph (3) of subdivision (d) of Section 42238.02.

(C) Paragraph (2) of subdivision (g) of Section 42238.02.

(d) An individual with a substitute permit or teaching permit authorized by the Commission on Teacher Credentialing pursuant to subdivision (m) of Section 44225 or Section 44300 of this code, or Sections 80025, 80025.1, and 80025.2 of Title 5 of the California Code of Regulations, that provides substitute teaching services in a transitional kindergarten classroom, shall not be subject to the requirements of paragraph (4) of subdivision (g) of Section 48000.

(a) It is the intent of the Legislature that each transitional kindergarten classroom that includes an early enrollment child maintains at least one adult for every 10 pupils, and that credentialed teachers who are first assigned to a transitional kindergarten classroom that includes one or more early enrollment children meet at least one of the requirements specified subparagraphs (A) to (C), inclusive, of paragraph (4) of subdivision (g) of Section 48000.

(b) For purposes of this section, the following definitions apply:

(1) (A) "Active enrollment count" means the count of all pupils enrolled in a transitional kindergarten classroom with early enrollment children on the first day of the school year on which the

Section 48000.1 Fiscal penalties for failure to meet TK requirements

Section 48000.15 Other fiscal penalties for failure to meet TK requirements

Section 48000.15
Other fiscal penalties for failure to
meet TK requirements
(continued)

- class was in session, plus all subsequent enrollees, minus all withdrawals since that first day.
- (B) An active enrollment count shall be made on the last teaching day of each school month that ends before April 15 of the school year.
- (C) (i) For school districts, the active enrollment count shall not include pupils enrolled in independent study pursuant to Article 5.5 (commencing with Section 51744) of Chapter 5 of Part 28 who (I) meet the minimum day requirements for independent study and (II) are continually enrolled in independent study for more than 14 schooldays in a school year.
- (ii) For charter schools, the active enrollment count shall not include pupils enrolled in independent study pursuant to Article 5.5 (commencing with Section 51744) of Chapter 5 of Part 28 who are continually enrolled in independent study for more than 14 schooldays on any of the days on which school is taught for the purpose of meeting the 175-instructional-day offering requirement, as described in Section 11960 of Title 5 of the California Code of Regulations.
- (2) "Adult-to-pupil ratio" shall be the quotient of the active enrollment count divided by the total number of adults, rounded to the nearest half or whole integer.
- (3) "Class" means a group of pupils scheduled to report regularly at a particular time to a particular teacher during the regular schoolday, as defined by the governing board of the school district or the governing body of the charter school, as applicable, excluding special day classes. Classes in the evening and summer school class shall not be considered classes for purposes of this calculation.
- (4) "Early enrollment child" means a child whose fourth birthday will be between the third of June and first of September, inclusive, preceding the school year during which they are enrolled in a transitional kindergarten classroom.
- (5) "Number of adults" shall be determined for each classroom subject to this section as follows:
- (A) A count of employees of the school district or charter school assigned to each class that includes early enrollment transitional kindergarten pupils shall be made on the last teaching day of each school month that ends before April 15 of the school year.
- (B) The sum of all of the adult counts pursuant to subparagraph (A) shall be divided by the total number of those counts, rounded to the nearest half or whole integer.
- (c) (1) Beginning July 1, 2023, and for the 2023–24 and 2024–25 school years, any school district or charter school that offers transitional kindergarten to early enrollment children shall concurrently offer enrollment in a California state preschool program that is operated by the school district or charter school if the school district or charter school operates a California state preschool program and if that program is not fully subscribed, and may, notwithstanding Section 8208, enroll an early enrollment child in a California state preschool program operated by the school district or charter school, regardless of income, after all other eligible children have been enrolled.
- (2) Notwithstanding any other law, a pupil admitted to a transitional kindergarten program pursuant to this section shall not generate average daily attendance for purposes of Section 46300, or be included in the enrollment or unduplicated pupil count pursuant to Section 42238.02, until the pupil has attained their fifth birthday.
- (d) Notwithstanding subparagraph (A) of paragraph (2) of subdivision (c) of Section 48000, a school district or charter school may enroll an early enrollment child in a transitional kindergarten program if all of following conditions are met:
- (1) Any classroom that includes an early enrollment child shall maintain an adult-to-pupil ratio of at least one adult to every 10 pupils.
- (2) The school district or charter school prioritizes assigning credentialed teachers that meet at least one of the requirements specified in subparagraphs (A) to (C), inclusive, of paragraph (4) of subdivision (g) of Section 48000 to early enrollment transitional kindergarten classrooms, to the extent possible.
- (3) Any transitional kindergarten classroom that includes an early enrollment child shall maintain a classroom enrollment that does not exceed 20 pupils.
- (e) (1) If a school district or charter school fails to comply with the requirements of paragraph (1) or (3) of subdivision (d), the Superintendent shall withhold from the school district's or charter school's entitlement computed pursuant to Section 42238.02 an amount pursuant to the following:
- (A) For school districts and charter schools that fail to meet the adult-to-pupil ratio requirements of paragraph (1) of subdivision (d) for classrooms that include an early enrollment child, the amount shall be determined by multiplying:
- (i) The number of additional adults needed to meet the requirements of paragraph (1) of subdivision (d), as calculated by dividing the total enrollment pupils in each transitional kindergarten classroom with early enrollment children, by 10, rounded to the nearest half or whole integer, minus the total number of adults assigned to the classroom, as determined pursuant to subparagraph (B) of paragraph (3) of subdivision (b).
- (ii) Twenty, reduced by the statewide average rate of absence for elementary school districts for kindergarten and grades 1 to 8, inclusive, as calculated by the department for the prior fiscal year, with the resultant figures and rates rounded to the nearest tenth.
- (iii) The per average daily attendance rate determined pursuant to paragraph (2) of subdivision (g) of Section 42238.02.

Section 48000.15
Other fiscal penalties for failure to meet TK requirements
(continued)

(B) For school districts and charter schools that fail to maintain a class enrollment of not more than 20 pupils, as required pursuant to paragraph (3) of subdivision (d), the amount determined by multiplying the then-current fiscal year's average daily attendance reported for the second principal apportionment period in transitional kindergarten classrooms with early enrollment children by the amount specified in subparagraph (A) of paragraph (3) of subdivision (d) of Section 42238.02, unless the school district or charter school fails to meet the requirements for average class size for kindergarten and grades 1 to 3, inclusive, pursuant to clause (i) of subparagraph (D) of paragraph (3) of subdivision (d) of Section 42238.02.

(2) The Superintendent shall adjust an amount withheld pursuant to the requirements of paragraph (1) in order to ensure that the total amount withheld pursuant to paragraph (1) and Section 48000.1 does not exceed the product of both of the following:

(A) The then-current fiscal year's average daily attendance reported for the second principal apportionment period in transitional kindergarten for the applicable school district or charter school.

(B) The sum of the per average daily attendance rates of all of the following:

(i) Subparagraph (A) of paragraph (1) of subdivision (d) of Section 42238.02.

(ii) Subparagraph (A) of paragraph (3) of subdivision (d) of Section 42238.02.

(iii) Paragraph (2) of subdivision (g) of Section 42238.02.

(f) For the 2023–24 and 2024–25 school years, any school district or charter school that serves early enrollment children in transitional kindergarten shall report to the department, pursuant to a process determined by the department, the number of teachers in transitional kindergarten classrooms with early enrollment children that did not meet at least one of the requirements specified in subparagraphs (A) to (C), inclusive, of paragraph (4) of subdivision (g) of Section 48000. The department shall submit a report to the appropriate fiscal and policy committees of the Legislature and the Department of Finance by October 1, 2024, and again by October 1, 2025, that includes this information, disaggregated by each school district and charter school.

(g) For the 2023–24 and 2024–25 fiscal year Guide for Annual Audits of K–12 Local Education Agencies and State Compliance Reporting, the Controller shall incorporate verification of compliance with the requirements specified in paragraphs (1) and (3) of subdivision (d).

(h) This section shall become inoperative on July 1, 2025.

PUBLIC SCHOOL PERFORMANCE ACCOUNTABILITY PROGRAM
Education Code

(a)(1) The single multiple measures public school accountability system authorized by Article 4.5 (commencing with Section 52059.5) shall measure the overall performance of numerically significant pupil subgroups in schools, including charter schools, school districts, and county offices of education.

(2) For purposes of this section, numerically significant pupil subgroups include all of the following:

(A) Ethnic subgroups.

(B) Socioeconomically disadvantaged pupils.

(C) English learners and, separately, long-term English learners, defined as a pupil who has not attained English language proficiency within seven years of initial classification as an English learner.

(D) Pupils with disabilities.

(E) Foster youth.

(F) Homeless youth.

(3)(A) For purposes of this section, a numerically significant pupil subgroup is one that consists of at least 30 pupils.

(B) Notwithstanding subparagraph (A), for a subgroup of pupils who are foster youth, homeless youth, or long-term English learners, a numerically significant pupil subgroup is one that consists of at least 15 pupils.

(b) To complement the multiple measures system, the Superintendent, with the approval of the state board, may develop and implement a program of school quality review that features locally convened panels to visit schools, observe teachers, interview pupils, and examine pupil work.

(c) The Superintendent shall annually provide to local educational agencies and the public a transparent and understandable explanation of the individual components of the multiple measures system.

(d) For purposes of the statewide system of support established pursuant to Article 4.5 (commencing with Section 52059.5), or any successor system, alternative schools include schools under the jurisdiction of a county board of education or a county superintendent of schools, community day schools, nonpublic, nonsectarian schools pursuant to Section 56366, and alternative schools serving high-risk pupils, including continuation high schools, dropout recovery high schools, and opportunity schools.

(e) For purposes of this section, the following terms shall have the following meanings:

(1) "Dropout recovery high school" means a school offering instruction in any of grades 9 to 12, inclusive, in which 50 percent or more of its pupils are either designated as dropouts pursuant to the exit and withdrawal codes developed by the department or left a school and were not

Section 52052
Academic accountability

Numerically significant pupil subgroups defined

School quality review program

Multiple measures

Alternative schools

Program definitions

Section 52052
Academic accountability

(continued)

API replaced

Alternative measures
"standard" for renewal

otherwise enrolled in a school for a period of at least 180 days and the school provides instruction in partnership with any of the following:

(A) The federal Workforce Innovation and Opportunity Act (Public Law 113-128).

(B) Federally affiliated Youthbuild programs (29 U.S.C. Sec. 3226 et seq.).

(C) Federal job corps training or instruction provided pursuant to a memorandum of understanding with the federal provider.

(D) The California Conservation Corps or local conservation corps certified by the California Conservation Corps pursuant to Section 14406 or 14507.5 of the Public Resources Code.

(2) "Homeless youth" has the same meaning as in Section 11434a(2) of Title 42 of the United States Code.

(f) For any program identified in law that utilized a calculation pursuant to the former Academic Performance Index established pursuant to this section, as this section read on January 1, 2018, the 2013 growth calculation shall be applied for those purposes. For purposes of paragraphs (1) to (3), inclusive, of subdivision (b) of Section 47607, alternative measures that show increases in pupil academic achievement for all groups of pupils schoolwide and among numerically significant pupil subgroups shall be used.

LOCAL CONTROL AND ACCOUNTABILITY PLANS (LCAP) AND THE STATEWIDE SYSTEM OF SUPPORT (SELECTED PROVISIONS)

Education Code

Section 52059.5
Single system for support; purpose

(a) A single system for providing support to local educational agencies and schools pursuant to this article and for federal programs pursuant to the federal Elementary and Secondary Education Act (20 U.S.C. Sec. 6301 et seq.) is hereby established.

(b) The purpose of this statewide system of support is to build the capacity of local educational agencies to do all of the following:

(1) Support the continuous improvement of pupil performance within the state priorities as described in Sections 52060 and 52066.

(2) Address the gaps in achievement between pupil subgroups as described in Section 52052.

(3) Improve outreach and collaboration with stakeholders to ensure that goals, actions, and services as described in school district and county office of education local control and accountability plans reflect the needs of pupils and the community, especially for historically underrepresented or low-achieving populations.

Section 52060
State priorities

Priorities apply based on grade levels served by the charter school

(a) On or before July 1, 2014, the governing board of each school district shall adopt a local control and accountability plan using a template adopted by the state board.

(b) A local control and accountability plan adopted by the governing board of a school district shall be effective for a period of three years, and shall be updated on or before July 1 of each year.

(c) A local control and accountability plan adopted by the governing board of a school district shall include, for the school district and each school within the school district, all of the information specified in the template adopted by the state board pursuant to Section 52064.

(d) All of the following are state priorities for purposes of a school district's local control and accountability plan:

(1) The degree to which the teachers of the school district are appropriately assigned in accordance with Section 44258.9, and fully credentialed in the subject areas, and, for the pupils they are teaching, every pupil in the school district has sufficient access to the standards-aligned instructional materials as determined pursuant to Section 60119, and school facilities are maintained in good repair, as defined in subdivision (d) of Section 17002.

(2) Implementation of the academic content and performance standards adopted by the state board, including how the programs and services will enable English learners to access the common core academic content standards adopted pursuant to Section 60605.8 and the English language development standards adopted pursuant to former Section 60811.3, as that section read on June 30, 2013, or former Section 60811.4, as that section read on June 30, 2016, for purposes of gaining academic content knowledge and English language proficiency.

(3) (A) Parental involvement and family engagement, including efforts the school district makes to seek parent input in making decisions for the school district and each individual schoolsite, and including how the school district will promote parental participation in programs for unduplicated pupils and individuals with exceptional needs.

(B) Family engagement may include, but need not be limited to, efforts by the school district and each individual schoolsite to apply research-based practices, such as welcoming all families into the school community, engaging in effective two-way communication, supporting pupil success, and empowering families to advocate for equity and access. Family engagement may include, but need not be limited to, treating families as partners to inform, influence, and create practices and programs that support pupil success and collaboration with families and the broader community, expand pupil learning opportunities and community services, and promote civic participation.

(4) Pupil achievement, as measured by all of the following, as applicable:

- (A) Statewide assessments administered pursuant to Article 4 (commencing with Section 60640) of Chapter 5 of Part 33 or any subsequent assessment, as certified by the state board.
- (B) The percentage of pupils who have successfully completed courses that satisfy the requirements for entrance to the University of California and the California State University.
- (C) The percentage of pupils who have successfully completed courses that satisfy the requirements for career technical education sequences or programs of study that align with state board-approved career technical education standards and frameworks, including, but not limited to, those described in subdivision (a) of Section 52302, subdivision (a) of Section 52372.5, or paragraph (2) of subdivision (e) of Section 54692.
- (D) The percentage of pupils who have successfully completed both types of courses described in subparagraphs (B) and (C).
- (E) The percentage of English learner pupils who make progress toward English proficiency as measured by the English Language Proficiency Assessments for California or any subsequent assessment of English proficiency, as certified by the state board.
- (F) The English learner reclassification rate.
- (G) The percentage of pupils who have passed an advanced placement examination with a score of 3 or higher.
- (H) The percentage of pupils who demonstrate college preparedness pursuant to the Early Assessment Program, as described in Chapter 6 (commencing with Section 99300) of Part 65 of Division 14 of Title 3, or any subsequent assessment of college preparedness.
- (5) Pupil engagement, as measured by all of the following, as applicable:
- (A) School attendance rates.
- (B) Chronic absenteeism rates.
- (C) Middle school dropout rates.
- (D) High school dropout rates.
- (E) High school graduation rates.
- (6) School climate, as measured by all of the following, as applicable:
- (A) Pupil suspension rates.(B) Pupil expulsion rates.
- (C) Other local measures, including surveys of pupils, parents, and teachers on the sense of safety and school connectedness.
- (7) The extent to which pupils have access to, and are enrolled in, a broad course of study that includes all of the subject areas described in Section 51210 and subdivisions (a) to (i), inclusive, of Section 51220, as applicable, including the programs and services developed and provided to unduplicated pupils and individuals with exceptional needs, and the programs and services that are provided to benefit these pupils as a result of the funding received pursuant to Section 42238.02, as implemented by Section 42238.03.
- (8) Pupil outcomes, if available, in the subject areas described in Section 51210 and subdivisions (a) to (i), inclusive, of Section 51220, as applicable.
- (e) For purposes of the descriptions required by subdivision (b) of Section 52064, the governing board of a school district may consider qualitative information, including, but not limited to, findings that result from school quality reviews conducted pursuant to subdivision (b) of Section 52052 or any other reviews.
- (f) To the extent practicable, data reported in a local control and accountability plan shall be reported in a manner consistent with how information is reported on the California School Dashboard maintained by the department pursuant to Section 52064.5.
- (g) The governing board of a school district shall consult with teachers, principals, administrators, other school personnel, local bargaining units of the school district, parents, and pupils in developing a local control and accountability plan.
- (h) A school district may identify local priorities, goals in regard to the local priorities, and the method for measuring the school district's progress toward achieving those goals.
- (a) (1) On or before July 1, 2019, and each year thereafter, each school district, county office of education, and charter school shall develop a summary document that shall be known as the local control funding formula budget overview for parents.
- (2) The local control funding formula budget overview for parents shall be developed in conjunction with, and attached as a cover to, the local control and accountability plan and annual update to the local control and accountability plan adopted by the governing board of a school district pursuant to Section 52062, by a county board of education pursuant to Section 52068, or by a charter school pursuant to Section 47606.5. The local control funding formula budget overview for parents, local control and accountability plan, and annual update to the local control and accountability plan shall comprise a single document for purposes of the posting requirements described in Section 52065.
- (b) The local control funding formula budget overview for parents shall include all of the following information for the school district, county office of education, or charter school:
- (1) The total projected general fund revenue for the ensuing fiscal year and the subtotals for each of the following categories:

Section 52064.1
LCFF budget overview required as
cover page to LCAP

Section 52064.1
LCFF budget overview required as
cover page to LCAP
(continued)

- (A) (i) Funds apportioned under the local control funding formula pursuant to Section 2574 or 42238.02, as applicable.
- (ii) Additionally and separately, for county offices of education, funds apportioned pursuant to subdivision (c) of Section 2574.
- (B) Of the funds described in paragraph (1), the funds apportioned on the basis of the number and concentration of unduplicated pupils pursuant to Section 2574 or 42238.02, as applicable.
- (C) (i) All other state funds.
- (ii) Additionally and separately, for county offices of education, funds apportioned pursuant to Section 2575.5.
- (D) All local funds.
- (E) All federal funds.
- (2) (A) The total projected general fund expenditures for the ensuing fiscal year.
- (B) Additionally and separately, for county offices of education, budgeted expenditures of funds apportioned pursuant to subdivision (c) of Section 2574.
- (C) Additionally and separately, for county offices of education, budgeted expenditures of funds apportioned pursuant to Section 2575.5.
- (3) (A) The total budgeted expenditures for the ensuing fiscal year on the planned actions and services to meet the goals included in the local control and accountability plan.
- (B) Additionally and separately, for county offices of education, budgeted expenditures of funds apportioned pursuant to subdivision (c) of Section 2574 for the ensuing fiscal year on the planned actions and services to meet the goals included in the local control and accountability plan.
- (C) Additionally and separately, for county offices of education, budgeted expenditures of funds apportioned pursuant to Section 2575.5 for the ensuing fiscal year on the planned actions and services to meet the goals included in the local control and accountability plan.
- (4) The total budgeted expenditures for the ensuing fiscal year on the planned actions and services included in the local control and accountability plan that contribute to the increased or improved services for unduplicated pupils pursuant to Section 42238.07.
- (5) The total budgeted expenditures for the existing fiscal year on the planned actions and services included in the local control and accountability plan that contribute to the increased or improved services for unduplicated pupils pursuant to Section 42238.07.
- (6) The estimated actual expenditures for the existing fiscal year on the planned actions and services included in the local control and accountability plan that contribute to the increased or improved services for unduplicated pupils pursuant to Section 42238.07.
- (7) A brief description of the activities or programs supported by any expenditures described in paragraph (2) that are not included in paragraph (3).
- (8) To the extent there is any difference between the expenditures described in paragraph (4) and the revenue described in subparagraph (B) of paragraph (1), a brief description of how the actions and services included in the local control and accountability plan improve services for unduplicated pupils pursuant to Section 42238.07.
- (9) A brief description of how any difference between the expenditures described in paragraph (5) that are not included in paragraph (6) impacted the planned actions and services included in the local control and accountability plan that contribute to the increased or improved services for unduplicated pupils pursuant to Section 42238.07, and the overall increased or improved services for unduplicated pupils pursuant to Section 42238.07.
- (10) For county offices of education, a brief description of activities supported by the expenditures described in subparagraphs (B) and (C) of paragraph (2) that are not included in subparagraphs (B) and (C) of paragraph (3).
- (11) The name and contact information for the school district, county office of education, or charter school.
- (c) (1) The local control funding formula budget overview for parents shall be subject to all of the following requirements for adoption, review, and approval of the local control and accountability plan and annual update to the local control and accountability plan:
 - (A) For a school district, Sections 52062, 52065, and 52070.
 - (B) For a county superintendent of schools, Sections 52065, 52068, and 52070.5.
 - (C) For a charter school, Section 47604.33 and subdivisions (e) and (f) of Section 47606.5.
- (2) (A) A local control funding formula budget overview for parents filed by the governing board of a school district with a county superintendent of schools, or a local control funding formula budget overview for parents filed by a county board of education with the Superintendent, shall be approved by the county superintendent of schools or the Superintendent, as applicable, if it adheres to the template adopted by the Superintendent pursuant to subdivision (e) and follows any instructions or directions for completing the template developed by the Superintendent.
- (B) If a county superintendent of schools or the Superintendent does not approve a local control funding formula budget overview for parents pursuant to subparagraph (A), the county superintendent of schools or the Superintendent shall withhold approval of the local control and accountability plan and annual update to the local control and accountability plan filed by the governing board of the school district or county board of education and shall provide technical assistance pursuant to subdivision (b) of Section 52071 or subdivision (b) of Section 52071.5.

(d) The template for the local control funding formula budget overview for parents developed pursuant to subdivision (e) shall, to the greatest extent practicable, use language that is understandable and accessible to parents. The information specified in subdivision (b) shall be displayed, to the greatest extent practicable, using visuals and graphics.

(e) (1) The Superintendent, subject to approval by the executive director of the state board, shall develop a template for the local control funding formula budget overview for parents on or before December 31, 2018. In developing the template, the Superintendent shall not require school districts to provide any information in addition to the information required pursuant to subdivision (b) and shall establish reasonable word or character limits for the information required pursuant to subdivision (b), as appropriate.

(2) The Superintendent, subject to approval by the executive director of the state board, shall update the template for the local control funding formula budget overview for parents, on or before December 31, 2024, to reflect county office of education requirements pursuant to subdivision (b) imposed by Section 63 of Chapter 48 of the Statutes of 2023.

(3) The development of the template for the local control funding formula budget overview for parents shall not be subject to the requirements of the Administrative Procedure Act (Chapter 3.5 commencing with Section 11340) of Part 1 of Division 3 of Title 2 of the Government Code).

(a) The superintendent of a school district shall do both of the following:

(1) Prominently post on the homepage of the internet website of the school district any local control and accountability plan approved by the governing board of the school district and the county superintendent of schools, and any updates, revisions, or addenda, including those to comply with federal law, to a local control and accountability plan approved by the governing board of the school district.

(2) Prominently post all local control and accountability plans submitted by charter schools that were authorized by the school district, or links to those plans, and any updates, revisions, or addenda, including those to comply with federal law, on the internet website of the school district.

(b) A county superintendent of schools shall do both of the following:

(1) Prominently post on the homepage of the internet website of the county office of education any local control and accountability plan approved by the county board of education and the Superintendent, and any updates, revisions, or addenda, including those to comply with federal law, to a local control and accountability plan approved by the county board of education.

(2) Prominently post all local control and accountability plans submitted by school districts and charter schools, or links to those plans, on the internet website of the county office of education.

(c) (1) (A) Each school district shall post the current school year's local control and accountability plan that has been adopted by the governing board of the school district pursuant to Section 52060, and that has been approved by the county superintendent of schools pursuant to Section 52070, on the performance overview portion of the California School Dashboard, established pursuant to subdivision (f) of Section 52064.5.

(B) Each county office of education shall post the current school year's local control and accountability plan that has been adopted by the county board of education pursuant to Section 52066, and that has been approved by the Superintendent pursuant to Section 52070.5, on the performance overview portion of the California School Dashboard, established pursuant to subdivision (f) of Section 52064.5.

(C) Each charter school shall post the current school year's local control and accountability plan that has been adopted by the governing body of the charter school pursuant to Section 47606.5, and submitted to its chartering authority and the county superintendent of schools, or only to the county superintendent of schools if the county board of education is the chartering authority, pursuant to Section 47606.5, on the performance overview portion of the California School Dashboard, established pursuant to subdivision (f) of Section 52064.5.

(2) The department shall notify each school district, county office of education, and charter school of the requirement to comply with the requirements of paragraph (1) and shall ensure that each school district, county office of education, and charter school has complied with the requirements of paragraph (1).

(a) The California Collaborative for Educational Excellence is hereby established.

(b) The purpose of the California Collaborative for Educational Excellence is to advise and assist school districts, county superintendents of schools, and charter schools in achieving the goals set forth in a local control and accountability plan adopted pursuant to this article. The California Collaborative for Educational Excellence shall achieve this purpose by facilitating continuous improvement for local educational agencies within California's system of public school support.

(c) The California Collaborative for Educational Excellence shall be governed by a board consisting of the following five members:

(1) The Superintendent or the Superintendent's designee.

(2) The president of the state board or the president of the state board's designee.

(3) A county superintendent of schools appointed by the Senate Committee on Rules.

Section 52065
LCAP Posting Requirements

Section 52074
California Collaborative
for Educational Excellence

- (4) A teacher appointed by the Speaker of the Assembly.
- (5) A superintendent of a school district appointed by the Governor.
- (d) The governing board of the California Collaborative for Educational Excellence shall select, and direct the administrative agent provided for in subdivision (e) to hire, the executive director of the California Collaborative for Educational Excellence and provide policy and program direction.
- (e) The department, in consultation with the executive director of the state board and with the approval of the Department of Finance, shall enter into a memorandum of understanding with a local educational agency, or consortium of local educational agencies, to serve as the administrative agent for the California Collaborative for Educational Excellence. The administrative agent shall operate all aspects of the California Collaborative for Educational Excellence in accordance with the terms of the memorandum of understanding entered into with the state, applicable statutes, and the policy and program direction of the governing board of the California Collaborative for Educational Excellence.
- (f) Pursuant to the policy and program direction of the governing board of the California Collaborative for Educational Excellence, the administrative agent shall contract with individuals, local educational agencies, or organizations with the expertise, experience, and a record of success to carry out the purposes of this article. The areas of expertise, experience, and record of success shall include, but are not limited to, all of the following:
 - (1) State priorities as described in subdivision (d) of Section 52060, including the state and local indicators developed for the California School Dashboard pursuant to Section 52064.5.
 - (2) Improving the quality of teaching.
 - (3) Improving the quality of school district and schoolsite leadership.
 - (4) Successfully addressing the needs of special pupil populations, including, but not limited to, English learners, pupils eligible to receive a free or reduced-price meal, pupils in foster care, and individuals with exceptional needs.
- (g) (1) The California Collaborative for Educational Excellence may accept a request or referral to advise and assist a school district, county superintendent of schools, or charter school pursuant to paragraph (2) or in either of the following circumstances:
 - (A) If the county superintendent of schools of the county in which the school district or charter school is located determines, following the provision of technical assistance pursuant to Section 52071 or 47607.3, as applicable, and the geographic lead agency of that county identified pursuant to Section 52073 agrees, that the advice and assistance of the California Collaborative for Educational Excellence is necessary to help the school district or charter school accomplish the goals described in the local control and accountability plan adopted pursuant to this article.
 - (B) If the Superintendent determines that the advice and assistance of the California Collaborative for Educational Excellence is necessary to help the school district, county superintendent of schools, or charter school accomplish the goals set forth in the local control and accountability plan adopted pursuant to this article.
- (2) (A) If a school district receives an emergency apportionment pursuant to Article 2 (commencing with Section 41320) of Chapter 3 of Part 24 of Division 3, the school district shall be deemed to have been referred to the California Collaborative for Educational Excellence.
- (B) If the California Collaborative for Educational Excellence provides assistance to a school district referred pursuant to this paragraph, the California Collaborative for Educational Excellence shall conduct a systemic review of the school district to identify needs and strategies to improve pupil academic achievement, including, but not limited to, needs identified pursuant to Sections 52052, 52064.5, and 52071. Based on the results of the systemic review, the California Collaborative for Educational Excellence shall coordinate and facilitate the assistance provided to the school district by governmental agencies to provide coherent and effective support consistent with the purpose of the statewide system of support specified in Section 52059.5. The governmental agencies may include, among others, the department, the local county superintendent, the applicable geographic lead agency, and the County Office Fiscal Crisis and Management Assistance Team. It is the intent of the Legislature that no single governmental agency providing assistance in partnership with other governmental agencies bear the full cost of assistance.
- (3) Outside of the processes described in paragraphs (1) and (2), only a school district, county office of education, or charter school that is eligible for technical assistance pursuant to Section 52071, 52071.5, or 47607.3 may request the advice and assistance of the California Collaborative for Educational Excellence. A school district, county office of education, or charter school that requests advice and assistance pursuant to this paragraph shall reimburse the California Collaborative for Educational Excellence for the cost of those services pursuant to authority provided in the annual Budget Act.
- (4) Notwithstanding paragraphs (1), (2), and (3), the County Office Fiscal Crisis and Management Assistance Team established pursuant to Section 42127.8 may request the advice or assistance of the California Collaborative for Educational Excellence and shall reimburse the California Collaborative for Educational Excellence for the cost of those services pursuant to authority provided in the annual Budget Act.

**Section 52074
California Collaborative
for Educational Excellence
(continued)**

(h) To the extent authority is provided in the annual Budget Act, a school district at risk of qualifying for state intervention pursuant to subdivision (b) of Section 52072 shall have priority for direct technical assistance from the California Collaborative for Educational Excellence.

(i) In addition to the functions described in subdivision (g), the California Collaborative for Educational Excellence shall do both of the following:

(1) Facilitate professional development activities that increase the capacity of local educational agencies to improve pupil outcomes in alignment with state priorities pursuant to Section 52060 and to improve performance on the state and local indicators developed for the California School Dashboard pursuant to Section 52064.5. The California Collaborative for Educational Excellence shall provide professional development in partnership with state professional associations, nonprofit organizations, and public agencies. The governing board of the California Collaborative for Educational Excellence shall determine the extent of the training that is necessary to comply with this paragraph.

Professional development

(2) Produce a professional development training calendar, to be posted on the California Collaborative for Educational Excellence's internet website, that publicizes all of the professional development activities offered pursuant to paragraph (1) at the local, regional, and state levels.

(j) The individuals with whom the administrative agent enters into employment contracts to carry out the purposes of this article shall be deemed employees of the administrative agent and eligible for participation in either the State Teachers' Retirement System or the Public Employees' Retirement System, as appropriate to the nature of the work to be performed by the employees.

(k) Receipt of any revenues not appropriated by the Legislature to the California Collaborative for Educational Excellence, including revenues received for assistance provided pursuant to paragraphs (3) and (4) of subdivision (g), shall be subject to approval by the governing board of the California Collaborative for Educational Excellence. The governing board of the California Collaborative for Educational Excellence shall ensure that all activities, regardless of fund source, are aligned with the purpose of the California Collaborative for Educational Excellence, as described in subdivision (b).

(a) A complaint that a school district, county superintendent of schools, or charter school has not complied with the requirements of this article or Sections 47606.5 and 47607.3, as applicable, may be filed with a school district, county superintendent of schools, or charter school pursuant to the Uniform Complaint Procedures set forth in Chapter 5.1 (commencing with Section 4600) of Division 1 of Title 5 of the California Code of Regulations.

**Section 52075
LCAP complaints subject to UCP**

(b) A complaint may be filed anonymously if the complaint provides evidence or information leading to evidence to support an allegation of noncompliance with the requirements of this article.

(c) A complainant not satisfied with the decision of a school district, county superintendent of schools, or charter school may appeal the decision to the Superintendent and shall receive a written appeal decision within 60 days of the Superintendent's receipt of the appeal.

(d) If a school district, county superintendent of schools, or charter school finds merit in a complaint, or the Superintendent finds merit in an appeal, the school district, county superintendent of schools, or charter school shall provide a remedy to all affected pupils, parents, and guardians.

(e) If the Superintendent finds merit in an appeal of a complaint filed against a school district related to a local control and accountability plan approved by a county superintendent of schools, or finds merit in an appeal against a county superintendent of schools related to the approval of a school district's local control and accountability plan, the Superintendent shall provide technical assistance to the county superintendent of schools focused on improving the county superintendent of schools' review and approval of local control and accountability plans.

(f) Information regarding the requirements of this article shall be included in the annual notification distributed to pupils, parents and guardians, employees, and other interested parties pursuant to Section 4622 of Title 5 of the California Code of Regulations or any successor regulation.

(g) School districts, county superintendents of schools, and charter schools shall establish local policies and procedures to implement the provisions of this section on or before June 30, 2014.

**BILINGUAL TEACHER PROFESSIONAL DEVELOPMENT
Education Code**

(a) The Bilingual Teacher Professional Development Program shall be administered by the department in consultation with the Commission on Teacher Credentialing. The department shall issue grants to applicants through a competitive process.

**Section 52202
Competitive grant funding;
eligibility and selection**

(b) (1) The department shall allocate grant funding to eligible local educational agencies, including county offices of education, school districts, charter schools, or a consortia of local educational agencies for purposes of providing professional development services to teachers or paraprofessionals who satisfy the requirements of subdivision (c). Grant recipients may partner with community colleges, public or private four-year institutions of postsecondary education, and professional organizations or nonprofit organizations with English learner expertise.

(2) The department shall issue a minimum of five grants under the program.

Section 52202
Competitive grant funding;
eligibility and selection

(continued)

- (c) (1) A teacher shall be eligible for professional development services pursuant to subdivision (b) if the teacher possesses a teaching credential or an education specialist credential authorizing the holder to teach pupils with exceptional needs, and does either of the following:
- (A) Possesses an authorization to provide instruction to English learners pursuant to Section 44253.3, 44253.4, or 44253.7, and has provided instruction solely in English-only classrooms for three years or more.
 - (B) Is fluent in a language other than English, and seeks an authorization pursuant to Section 44253.3, 44253.4, or 44253.7 to provide instruction to English learners.
- (2) A school paraprofessional employee shall be eligible for professional development services if the employee is fluent in a language other than English, seeks to work with English learners or in a bilingual program, and intends to enter a pathway to become a credentialed teacher who holds a bilingual authorization.
- (3) Notwithstanding paragraph (1), participants who are currently enrolled in, or have completed, the Asian Language Bilingual Teacher Education Program shall be eligible for professional development services.
- (4) Notwithstanding paragraph (1), participants who are currently enrolled in, or have completed, programs to support bilingual teacher education in languages in the classroom, such as Arabic, Cantonese, Mandarin, Spanish, Tagalog, and Vietnamese, and other languages, as represented in an instructional program, shall be eligible for professional development services.
- (d) In selecting a grant recipient pursuant to subdivision (b), the department shall ensure that an applicant indicates how it plans to increase the number of teachers who obtain a bilingual authorization as a result of participation in the program and increase the number of teachers with a bilingual authorization who return to teaching in a bilingual or multilingual setting.
- (e) In awarding funding to eligible applicants pursuant to subdivision (b), the department shall adopt criteria demonstrating an applicant's ability to provide professional development services. The adopted criteria shall include, but are not limited to, all of the following:
- (1) Demonstrated commitment to bilingual and multilingual education and bilingual teacher development.
 - (2) Demonstrated capability to fully prepare teachers to obtain bilingual authorizations and to improve or update a teacher's knowledge and skills relating to biliteracy, English language acquisition, English language development, pupil assessment in English and other languages, and instruction in the components of a high-quality bilingual or multilingual education program.
 - (3) The availability of bilingual education staff with demonstrated experience and knowledge of bilingual and multilingual education for purposes of providing professional development programs.
 - (4) Demonstrated management and support services necessary to efficiently and effectively use funding provided under subdivision (b) to help meet the demand for bilingual teachers.
 - (5) Matching funds, or other in-kind matching resources, offered by the applicant in support of a professional development program funded pursuant to this article.
 - (6) Capacity to conduct an evaluation of a professional development program offered by the applicant for the purpose of identifying areas of strength, areas requiring improvement, and recommendations for making improvement.
- (f) The department shall ensure grant recipients selected for purposes of this article, to the maximum extent possible, are balanced with regard to geographic regions and urban and rural settings.
- (g) The department shall meet quarterly with grant recipients to share promising practices and resources, and to resolve issues of implementation.
- (h) (1) By January 1, 2022, grant recipients awarded funds appropriated pursuant to Section 85 of Chapter 15 of the Statutes of 2017 shall provide a final report to the department on the number of participants who were issued bilingual authorizations, the number of previously authorized teachers who have participated in the program and subsequently returned to bilingual teaching assignments, and the number of teachers who are still working at least 50 percent of the time in a bilingual setting.
- (2) The project performance period for Bilingual Teacher Professional Development grant funds appropriated pursuant to Section 85 of Chapter 15 of the Statutes of 2017 is January 1, 2018, to June 30, 2021, inclusive.
- (i) (1) By July 1, 2026, grant recipients awarded funds appropriated pursuant to Section 119 of Chapter 48 of the Statutes of 2023 shall provide a preliminary report, and, by January 1, 2030, a final report, to the department on the number of participants who were issued bilingual authorizations, the number of previously authorized teachers who have participated in the program and subsequently returned to bilingual teaching assignments, and the number of teachers who are still working at least 50 percent of the time in a bilingual setting.
- (2) The project performance period for Bilingual Teacher Professional Development grant funds appropriated pursuant to Section 119 of Chapter 48 of the Statutes of 2023 is January 1, 2024, to June 30, 2029, inclusive.

SCREENING FOR RISK OF READING DIFFICULTIES

Education Code

Section 53008 Screening and Assessment

- (a) (1) The Legislature finds and declares that screening pupils for risk of reading difficulties, including dyslexia, is one of many tools that educators can employ to gain information about how to support their pupils' learning. Screening should be considered part of a school's comprehensive instructional strategy, and should be used by educators like other types of formative and summative assessments: to inform individualized instruction, measure a pupil's progress, identify pupil learning needs, and enable parents and educators to discuss pupil needs in a more informed way.
- (2) The Legislature further finds and declares that early identification and intervention with evidence-based early literacy instructional strategies and materials improves literacy outcomes for pupils at risk of, and with, reading difficulties, including dyslexia. Dyslexia is the most common learning disability; however, many pupils on the dyslexia spectrum struggle every day to read without proper identification and support. By screening all pupils for risk of reading difficulties early, California can help families and teachers achieve the best learning and life outcomes for all pupils and close academic achievement gaps.
- (b) On or before January 31, 2024, the state board shall appoint an independent panel of experts for the purpose of creating an approved list of evidence-based, culturally, linguistically, and developmentally appropriate screening instruments for pupils in kindergarten and grades 1 and 2 to assess pupils for risk of reading difficulties, including possible neurological disorders such as dyslexia, pursuant to this section. The state board shall not appoint any person to the panel of experts with a financial interest in the screening instruments under consideration. The state board shall establish a review process, including how screening instruments will be evaluated against the criteria specified in subdivision (g), for the panel to use to evaluate and approve screening instruments. This subdivision does not prohibit the state board from periodically reconstituting this expert panel or updating the review process, nor does it prohibit the expert panel from periodically amending the list of screening instruments described in subdivision (c) at the request of the state board.
- (c) (1) The work of the panel of experts appointed by the state board pursuant to subdivision (b) is subject to the Bagley-Keene Open Meeting Act (Article 9 (commencing with Section 11120) of Chapter 1 of Part 1 of Division 3 of Title 2 of the Government Code) and all meetings of the panel are subject to the Bagley-Keene Open Meeting Act.
- (2) On or before December 31, 2024, the panel of experts appointed by the state board shall, at a regularly scheduled public meeting, vote to approve a list of screening instruments pursuant to the review process and evaluation criteria established by the state board pursuant to subdivision (b). The list shall include screening instruments that are developed both for English-speaking pupils and for non-English speaking pupils, in languages reflecting the primary languages of pupils in the state, to the extent assessments in those languages are available. The panel of experts shall also identify information about the appropriate administration of each screening instrument, including the appropriate grade or grades for administration of each screening instrument.
- (d) On or before June 30, 2025, the governing board or body of a local educational agency serving pupils in kindergarten or grades 1 or 2 shall adopt, at a public meeting, one or more screening instruments from the list adopted pursuant to subdivision (c) to assess pupils for risk of reading difficulties pursuant to this section. The screening instrument or instruments adopted shall provide assessments for both English-speaking pupils and non-English speaking pupils, in languages reflecting the primary languages of pupils in the local educational agency, to the extent assessments in those languages are available.
- (e) Commencing no later than the 2025–26 school year, and annually thereafter, a local educational agency serving pupils in kindergarten or grades 1 or 2 shall assess each pupil in kindergarten and grades 1 and 2 for risk of reading difficulties using the screening instrument or instruments adopted by the governing board or body of the local educational agency pursuant to subdivision (d), unless the pupil's parent or guardian opts out of the screening in writing. In determining when during the school year to administer each screening instrument, a local educational agency shall consider whether pupils have received sufficient instruction in foundational reading skills to support a valid assessment. Nothing in this section restricts local educational agencies from providing additional pupil screenings or diagnostic evaluations, as appropriate.
- (f) If a pupil enrolls for the first time in kindergarten or grades 1 or 2 after the screening instrument or instruments have been administered to all pupils in the given grade in that school year pursuant to subdivision (e), the local educational agency shall assess the pupil using the screening instrument or instruments adopted by the governing board or body of the local educational agency pursuant to subdivision (d) within 45 calendar days of enrollment, unless the pupil's parent or guardian opts out of the screening in writing, or unless the parent or guardian provides documentation or the local educational agency has documentation that the pupil has had a similar screening in their prior school for their current grade and the parent or guardian was made aware of the results.
- (g) (1) To support the adoption of high-quality screening instruments that minimize the overidentification or underidentification of pupils' risk of reading difficulties, and offer meaningful information for followup, the state board shall consider the extent to which a screening instrument addresses the following factors when adopting evaluation criteria pursuant to subdivision (b):

Section 53008
Screening and Assessment

(continued)

- (A) Use of direct measurement, supplemented by other pupil data, to determine if a pupil is at risk of a reading difficulty, including dyslexia.
- (B) Measurement of domains that may predict dyslexia and other reading disorders, including, but not limited to, measures of oral language, phonological and phonemic awareness, decoding skills, letter-sound knowledge, knowledge of letter names, rapid automatized naming, visual attention, reading fluency, vocabulary, and language comprehension.
- (C) Evidence that the tool is normed and validated using a contemporary multicultural and multilingual sample of pupils, with outcome data for pupils whose home language is a language other than English as well as those who are native English speakers.
- (D) Integration of relevant pupil demographic information, such as home language, English language fluency, and access to prekindergarten education, to more fully understand a pupil's performance.
- (E) Guidance and resources for educators regarding how to administer screening instruments, interpret results, explain results to families, including in pupils' primary languages, and determine further educational strategies, assessments, diagnostics, and interventions that should be considered and that are specific to each type of pupil result. Guidance and resources provided pursuant to this subparagraph shall be informed by the English Language Arts/English Language Development Framework for California Public Schools developed pursuant to Section 60207 and the California Dyslexia Guidelines developed pursuant to Section 56335, as well as knowledge of effective interventions for the specific needs of individual pupils, and shall reflect a tiered interventions model aligned with the Multi-Tiered Systems of Support.
- (2) Assessments administered pursuant to this section shall not be considered an evaluation or diagnostic tool to establish eligibility for special education and related services pursuant to the federal Individuals with Disabilities Education Act (20 U.S.C. Sec. 1400 et seq.), or an evaluation to determine eligibility for a plan pursuant to Section 504 of the federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794). However, assessments administered pursuant to this section shall not be used to delay the child find process required under the federal Individuals with Disabilities Education Act. Additionally, assessments administered pursuant to this section may be used by a local educational agency to recommend that a pupil receive further assessment and evaluation to establish eligibility for special education and related services pursuant to the federal Individuals with Disabilities Education Act, or to determine eligibility for a plan pursuant to Section 504 of the federal Rehabilitation Act of 1973.
- (h) Pupils who do not speak sufficient English to be screened with an English-language instrument shall be screened pursuant to this section in their primary language if a screening instrument in their primary language approved pursuant to subdivision (c) is available. If a screening instrument is not available in at least one language in which a pupil is proficient, before the pupil can be screened, the pupil's risk for reading difficulties shall be evaluated through an analysis of the pupil's developmental history, educational history, and literacy progress, taking into account the pupil's home background and evolving English language abilities, including speaking, listening, reading, spelling, and writing, consistent with the California Dyslexia Guidelines. Components of screening instruments that do not require English language proficiency may be used in this evaluation. When a pupil acquires sufficient English language knowledge and fluency to be able to be assessed using a screening instrument pursuant to this section, or if a screening instrument in their primary language becomes available, the local educational agency shall assess that pupil using the appropriate screening instrument.
- (i) A pupil may be exempted from the requirements of this section with the prior written consent of the parent or guardian if any of the following criteria are satisfied:
- (1) The pupil has a current identification or diagnosis of a reading difficulty, reading disorder, or other disability.
- (2) The pupil is eligible for special education and related services pursuant to the federal Individuals with Disabilities Education Act or a plan pursuant to Section 504 of the federal Rehabilitation Act of 1973.
- (3) The pupil is in the process of being assessed for eligibility for special education and related services pursuant to the federal Individuals with Disabilities Education Act or a plan pursuant to Section 504 of the federal Rehabilitation Act of 1973, and the pupil is being evaluated with diagnostic assessments that make screening pursuant to this section redundant.
- (j) A local educational agency shall provide parents or guardians of pupils eligible for screening pursuant to this section with information about the screening, including the date or dates of the screening and instructions for how parents or guardians can opt out of the screening on behalf of their child, no later than 15 calendar days before the administration of the screening instrument or instruments. A local educational agency is encouraged to provide information about screening pursuant to this section with other back-to-school materials at the beginning of the school year.
- (k) Pupil results from assessments administered pursuant to this section shall be made available to the pupil's parent or guardian in a timely manner, but no more than 45 calendar days from the date the assessment was administered. These results shall include information about how to interpret the results, as well as the next steps pursuant to subdivision (l), if applicable.

(l) Screening results shall be used as a flag for potential risk of reading difficulties, not as a diagnosis of a disability. Results from a screening instrument shall be used as part of a broader process that further evaluates pupil needs and progress, identifies supports for classroom instruction, enables targeted individual intervention as needed, and allows for further diagnosis if concerns do not resolve. Accordingly, if a pupil is identified as being at risk of having reading difficulties after being screened pursuant to this section, the local educational agency shall provide the pupil with supports and services, appropriate to the specific challenges identified by the screening instrument and other pertinent information about the pupil, which may include, among other supports and services, any of the following:

- (1) Evidence-based literacy instruction focused on the pupil's specific needs.
- (2) Progress monitoring.
- (3) Early intervention in the regular general education program.
- (4) One-on-one or small group tutoring.
- (5) Further evaluation or diagnostic assessment.

(m) Results of an assessment administered pursuant to this section shall not be used for any highstakes purpose, including, but not limited to, teacher or other school staff evaluation, accountability, pupil grade promotion or retention, identification for gifted or talented education, reclassification of English learners, or identification as an individual with exceptional needs.

(n) Notifications to parents or guardians provided pursuant to this section shall comply with the translation requirements set forth in Section 48985.

(o) For purposes of this section, the following definitions apply:

- (1) "English learner" has the same meaning as defined in subdivision (a) of Section 306.
- (2) "Kindergarten" shall not include transitional kindergarten, as defined in subdivision (d) of Section 48000.
- (3) "Local educational agency" means a school district, county office of education, or charter school.
- (4) "Reading difficulties" means a barrier that impacts a pupil's ability to learn to read or improve reading abilities, including dyslexia.
- (5) "Screening instrument" means a brief tool administered by an appropriately trained school employee, including, but not limited to, a certificated teacher of record, measuring discrete areas to determine pupils at risk of reading difficulties, including dyslexia.

SCHOOL PLANS FOR STUDENT ACHIEVEMENT (SPSA) AND SCHOOLSITE COUNCIL **Education Code**

(a) Notwithstanding any other law, as a condition of receiving funding for a program under Part 36 (commencing with Section 64000), a local educational agency shall ensure that each school of the local educational agency that operates any programs subject to Part 36 (commencing with Section 64000) consolidates any plans that are required by those programs into a single plan, unless otherwise prohibited by law. That plan shall be known as the School Plan for Student Achievement (SPSA). If a plan is not required by a program subject to Part 36 (commencing with Section 64000), the governing board or body of a local educational agency may require any school that receives funding from the consolidated application to develop a SPSA.

(b) A local educational agency shall not be required to submit the SPSA to the department as part of the consolidated application.

(c) A local educational agency shall ensure, in the consolidated application, that the SPSA has been prepared in accordance with law, that schoolsite councils have developed and approved a SPSA for each school participating in programs funded through the consolidated application process, and that SPSAs were developed with the review, certification, and advice of the school English learner advisory committee, if required.

(d) The department shall monitor and review to ensure that the consolidated application and the SPSA were developed in accordance with law and with the involvement of applicable advisory committees and schoolsite councils.

(e) Onsite school and district compliance reviews of categorical programs shall continue, and SPSAs shall be required and reviewed as part of these onsite visits and compliance reviews. The Superintendent shall monitor such compliance. To that end, the Superintendent shall develop monitoring instruments and establish the process and frequency for conducting reviews of school district achievement and compliance with state and federal categorical program requirements. The state board shall review the content of these instruments for consistency with state board policy.

(f) (1) A complaint that a local educational agency has not complied with the requirements of Part 36 (commencing with Section 64000), this part, or Part 38 (commencing with Section 65000) may be filed with a local educational agency pursuant to the Uniform Complaint Procedures set forth in Chapter 5.1 (commencing with Section 4600) of Division 1 of Title 5 of the California Code of Regulations.

(2) The department may require submission of the SPSA for any school that is the specific subject of a complaint involving any program or service subject to this part.

Section 64001 **School Plan for Student** **Achievement (SPSA) required as** **condition of receipt of federal and** **state categorical funds through** **consolidated application**

Complaints subject to UCP

Section 64001
School Plan for Student
Achievement (SPSA) required as
condition of receipt of federal and
state categorical funds through
consolidated application

(continued)
Development of SPSA

SPSA contents

(3) The department may require a local educational agency to submit other data or information as may be necessary for the department to effectively administer any program subject to this part.

(g) (1) Notwithstanding any other law, the schoolsite council shall develop the content of the SPSA. SPSAs shall be reviewed in accordance with paragraph (4) of subdivision (a) of Section 52062.

(2) The development of the SPSA shall include both of the following actions:

(A) Administration of a comprehensive needs assessment pursuant to Section 1114(b)(6) of the federal Every Student Succeeds Act (Public Law 114-95) that forms the basis of the school's goals contained in the SPSA. The comprehensive needs assessment shall include an analysis of verifiable state data, consistent with all state priorities as noted in Sections 52060 and 52066, and informed by all indicators described in Section 1111(c)(4)(B) of the federal Every Student Succeeds Act, including pupil performance against state-determined long-term goals. The school may include any data voluntarily developed by school districts to measure pupil outcomes. If the plan is required by the local governing board or body of the local educational agency only, the local governing board or body of the local educational agency may determine the extent to which the needs assessment applies.

(B) Identification of the process for evaluating and monitoring the implementation of the SPSA and progress towards accomplishing the goals set forth in the SPSA.

(3) The SPSA shall include all of the following:

(A) Goals set to improve pupil outcomes, including addressing the needs of pupil groups as identified through the needs assessment in subparagraph (A) of paragraph (2).

(B) Evidence-based strategies, actions, or services.

(C) Proposed expenditures, based on the projected resource allocation from the governing board or body of the local educational agency, to address the findings of the needs assessment consistent with the state priorities, including identifying resource inequities, which may include a review of the local educational agency's budgeting, its local control and accountability plan, and school-level budgeting, if applicable.

(h) SPSAs created under this part may serve as school improvement plans required under federal law for schools identified for targeted support as described in Section 1003(e)(1)(A) of the federal Every Student Succeeds Act (Public Law 114-95) or comprehensive support as described in Section 1003(e)(1)(B) of the federal Every Student Succeeds Act, as long as the SPSAs also meet the requirements as established by the federal Elementary and Secondary Education Act of 1965 (Public Law 89-10), as amended by the federal Every Student Succeeds Act. A local educational agency may use the schoolsite council to meet the stakeholder requirements established in Section 1111(d)(1)(B) and Section 1111(d)(2)(B) of the federal Every Student Succeeds Act.

(i) The SPSA required by this section shall be reviewed annually and updated, including proposed expenditure of funds allocated to the school through the consolidated application and the local control and accountability plan, if any, by the schoolsite council. The SPSAs shall be reviewed and approved by the governing board or body of the local educational agency at a regularly scheduled meeting whenever there are material changes that affect the academic programs for pupils covered by programs identified in this part. If a SPSA is not approved by the governing board or body of the local educational agency, specific reasons for that action shall be communicated to the schoolsite council. Modifications to any SPSA shall be developed, recommended, and approved or disapproved by the governing board or body of the local educational agency in the same manner.

(j) Single school districts and charter schools may use the local control and accountability plan to serve as the SPSA, provided that the local control and accountability plan meets federal school planning requirements and the stakeholder requirements established in subdivision (a) of Section 52062, and is adopted at a public hearing pursuant to Section 52062 or 47606.5, as applicable.

Charter schools may use LCAP as SPSA provided content and process meet requirements

Section 65000
Schoolsite council; required as
condition of receipt of federal funds
through consolidated application;
composition

(a) It is the intent of the Legislature that, to the extent possible, the members of the schoolsite council represent the composition of the school's pupil population. It is also the intent of the Legislature that, notwithstanding the size of the school, the composition of the schoolsite council ensure parity between the groups referenced in paragraphs (1) and (2) of subdivision (c).

(b) A school that operates a program that requires a School Plan for Student Achievement, pursuant to Section 64001, shall establish a schoolsite council.

(c) (1) At an elementary school, the schoolsite council shall consist of both of the following groups:

(A) The principal of the school or his or her designee; classroom teachers employed at the school, selected by classroom teachers employed at the school; and school personnel employed at the school who are not teachers, selected by school personnel employed at the school who are not teachers. The classroom teachers selected pursuant to this subparagraph shall constitute a majority of the persons selected pursuant to this subparagraph.

(B) Parents of pupils attending the school, or other members of the school community, selected by parents of pupils attending the school. The number of persons selected pursuant to this subparagraph shall equal the number of persons selected pursuant to subparagraph (A).

(2) At a secondary school, the schoolsite council shall consist of both of the following groups:

(A) The principal of the school or his or her designee; classroom teachers employed at the school, selected by classroom teachers employed at the school; and school personnel employed at the school who are not teachers, selected by school personnel employed at the school who are not teachers. The classroom teachers selected pursuant to this subparagraph shall constitute a majority of the persons selected pursuant to this subparagraph.

(B) Parents of pupils attending the school, or other members of the school community, selected by parents of pupils attending the school; and pupils attending the school, selected by pupils who are attending the school. The number of persons selected pursuant to this subparagraph shall equal the number of persons selected pursuant to subparagraph (A).

(d) An employee of a school who is also a parent or guardian of a pupil who attends a school other than the school of the parent's or guardian's employment is not disqualified by this employment from serving as a parent representative on the schoolsite council established for the school that his or her child or ward attends.

DIVERSE EDUCATION LEADERS PIPELINE INITIATIVE
Section 112 of SB 114 (Ch. 48, Statutes of 2023)

(a) For the 2023–24 fiscal year, the Superintendent of Public Instruction shall allocate funding appropriated in Provision 3 of Item 6100-488 of the Budget Act of 2023 to the Commission on Teacher Credentialing to establish the Diverse Education Leaders Pipeline Initiative program, as set forth in this section.

(b) The purpose of the program is to train, place, and retain diverse and culturally responsive administrators in transitional kindergarten, kindergarten, and grades 1 to 12, inclusive, to improve pupil outcomes and meet the needs of California's education workforce. The program shall have the following goals:

(1) Increasing diversity among public school administrators for transitional kindergarten, kindergarten, and grades 1 to 12, inclusive, to promote school environments that better represent and reflect the diversity of the pupils served.

(2) Cultivating culturally responsive public school administrators for transitional kindergarten, kindergarten, and grades 1 to 12, inclusive, through professional development that centers diversity, equity, and inclusion.

(3) Mitigating or removing administrator credentialing costs for aspiring public school administrators for transitional kindergarten, kindergarten, and grades 1 to 12, inclusive, and administrator preparation programs.

(4) Promoting improved academic and school climate outcomes for all pupils, especially historically underserved pupil subgroups.

(5) Tracking and publicly reporting recruitment, retention, and demographic data for all educators in transitional kindergarten, kindergarten, and grades 1 to 12, inclusive, to inform policy, legislation, and practice.

(c) For purposes of this section, the following definitions apply:

(1) "Administrator candidate" means an individual with a teaching or services credential eligible to pursue an administrative services credential, including individuals who will apply or who have applied to administrator programs.

(2) "Grant recipient" means a local educational agency or a consortium of local educational agencies that is awarded a grant pursuant to this section.

(3) "Institution of higher education" means a California postsecondary college or university accredited by the Commission on Teacher Credentialing to offer a preparation program for an administrative services credential.

(4) "Local educational agency" means a school district, county office of education, or charter school.

(5) "Nonprofit educational service provider" means either of the following:

(A) A California nonprofit entity accredited by the Commission on Teacher Credentialing to offer a preparation program for an administrative services credential.

(B) A California nonprofit entity in partnership with a local educational agency or institution of higher education accredited by the California Commission on Teacher Credentialing to offer a preparation program for an administrative services credential.

(d) The Commission on Teacher Credentialing shall develop criteria for the awarding of competitive grants and an application process, request necessary data from participating local educational agencies, and award grants consistent with this section. Successful applicants shall demonstrate an understanding of how diverse and culturally competent school leadership affects pupil academic success and social-emotional well-being, family engagement, and the retention of a diverse educator workforce.

(e) Grant recipients awarded funding pursuant to this section shall demonstrate a commitment to administrator diversity and culturally responsive school leadership, as evidenced by programmatic pedagogy, curriculum, coursework, mission statements, or any other relevant data, and shall receive an amount of up to thirty thousand dollars (\$30,000) per administrator candidate.

Section 112 of SB 114 (Ch. 48,
Statutes of 2023)

(f) (1) Permissible uses of funding allocated pursuant to this section include, but are not limited to, all of the following:

(A) Coaching, training, and mentoring activities for current administrators and administrator candidates to serve and educate diverse pupil populations, engage diverse families, and support and retain a diverse educator workforce.

(B) Developing support systems for a diverse administrator workforce that reflects a local educational agency community's diversity.

(C) Paying for or reimbursing administrator program costs.

(D) Paying for or reimbursing administrator credentialing costs.

(2) In performing these activities, a grant recipient may partner with an institution of higher education or a nonprofit educational service provider as applicable.

(g) An administrator candidate shall agree in writing to serve in a school within the jurisdiction of the grant recipient that sponsored the candidate or another public school in California for a period of at least two school years. The administrator candidate shall also commit in the written agreement to annually report to their sponsoring local educational agency where they are employed and their current contact information until they have completed their service requirement.

(h) If a candidate is unable to complete a school year of service, that school year may still be counted toward the required two complete school years if any of the following occur:

(1) The candidate has completed at least one-half of the school year.

(2) The employer deems the candidate to have fulfilled their contractual requirements for the school year.

(3) The candidate was not able to serve as an administrator due to the financial circumstances of the sponsoring grant recipient, including a decision to not reelect the employee for the succeeding school year.

(4) The candidate has a condition covered under the federal Family and Medical Leave Act of 1993 (29 U.S.C. Sec. 2601 et seq.) or similar state law.

(5) The candidate was called or ordered to active duty status for more than 30 days as a member of a reserve component of the Armed Forces of the United States.

(i) (1) If the Commission on Teacher Credentialing is informed that more than 10 percent of sponsored candidates in a local educational agency's yearly program cohort failed to earn an administrator credential or failed to meet their commitment pursuant to this section, the Commission on Teacher Credentialing shall confirm with the grant recipient the applicable grant amount to be recovered from the grant recipient based on the number of candidates who failed to earn a credential or meet their administrator commitment above a 10-percent attrition rate.

(2) The amount to be recovered shall be adjusted proportionately to reflect the service provided if the candidate served at least one year at a public school in California.

(j) Upon confirming the amount to be recovered from the grant recipient pursuant to subdivision (i), the Commission on Teacher Credentialing shall notify the grant recipient of the amount to be repaid within 60 days. The grant recipient shall have 60 days from the date of the notification to make the required repayment to the Commission on Teacher Credentialing. If the grant recipient fails to make the required payment within 60 days, the Commission on Teacher Credentialing shall notify the Controller and the grant recipient of the failure to repay the amount owed. The Controller shall deduct an amount equal to the amount owed to the Commission on Teacher Credentialing from the grant recipient's next principal apportionment or apportionments of state funds, other than basic aid apportionments required by Section 6 of Article IX of the California Constitution.

(k) An amount recovered by the Commission on Teacher Credentialing or deducted by the Controller pursuant to subdivision (j) shall be deposited into the Proposition 98 Reversion Account.

(l) Grant recipients may recover from a sponsored candidate who fails to earn an administrator credential, or who fails to complete the period of placement, the amount of grant funding invested in the administrator candidate's training. The amount to be recovered shall be adjusted proportionately to reflect the service provided if the administrator candidate served at least one year, but less than two years, at a public school in California.

(m) On or before June 30, 2027, the Commission on Teacher Credentialing shall submit a report on the Diverse Education Leaders Pipeline Initiative program to the Department of Finance and the appropriate policy and fiscal committees of both houses of the Legislature. The report shall include an evaluation of the program, including, but not limited to, all of the following information:

(1) The number of local educational agencies awarded a grant and the number of institutions of higher education and nonprofit educational service providers that were included in grantee partnerships.

(2) The number of administrator candidates supported by the grant award and the number of individuals who obtained an administrative services credential and employment as an administrator as a result of the program.

(3) Any relevant demographic data for each participating local educational agency, including the racial, ethnic, and gender demographics and first language of each administrator candidate supported by the grant award.

(4) The types of culturally relevant support provided to administrator candidates and administrators to improve retention and the education, engagement, and retention of diverse pupils, families, and educators.

(5) Where applicable, the impact of the program on pupil academic and school climate outcomes in participating local educational agencies.

ZERO-EMISSION SCHOOLBUSES

Section 121 of AB 181 (Ch. 52, Statutes of 2022), as amended by Section 96 of SB 114 (Ch. 48, Statutes of 2023)

(a) (1) For the 2023–24 fiscal year, the sum of three hundred seventy-five million dollars (\$375,000,000) is hereby appropriated from the General Fund to the State Air Resources Board for the Hybrid and Zero-Emission Truck and Voucher Incentive Project to fund zero-emission schoolbuses to replace heavy-duty internal combustion schoolbuses owned by local educational agencies over five years beginning in the 2023–24 fiscal year, consistent with this section. This funding shall be available as grants to local educational agencies for encumbrance until June 30, 2029. Local educational agencies shall have three fiscal years after the fiscal year in which the funds are received to expend the funds. Any funds that are not expended by a local educational agency by the end of that period shall be returned to the state.

(2) For the 2023–24 fiscal year, the sum of one hundred twenty-five million dollars (\$125,000,000) is hereby appropriated from the General Fund to the Energy Commission to fund zero-emission schoolbus charging or fueling infrastructure and related activities, including, but not limited to, charging or fueling stations, equipment, site design, construction, and related infrastructure upgrades, in order to complement the vehicle investments described in subdivision (a). This funding shall be available as grants to local educational agencies for encumbrance until June 30, 2029. Local educational agencies shall have three fiscal years after the fiscal year in which the funds are received to expend the funds. Any funds that are not expended by a local educational agency by the end of that period shall be returned to the state.

(b) It is the intent of the Legislature to appropriate three hundred and seventy-five million dollars (\$375,000,000) in the 2024–25 and 2025–26 fiscal years to the State Air Resources Board, and one hundred twenty-five million dollars (\$125,000,000) in the 2024–25 and 2025–26 fiscal years to the Energy Commission, for purposes of subdivision (a).

(c) The State Air Resources Board and the Energy Commission shall coordinate to offer a single application to cover vehicle purchases, infrastructure investments, and other associated funding requests.

(d) The State Air Resources Board and the Energy Commission shall ensure that the funding provided in this section supports the transition to zero-emission schoolbus fleets by supporting up to the full purchase cost of zero-emission schoolbuses and related schoolbus charging or fueling infrastructure, as well as provide funding support for other associated costs, including workforce development and training.

(e) (1) The State Air Resources Board, in consultation with the Energy Commission, shall prioritize funding zero-emission schoolbuses under this section.

(2) If a local educational agency is able to provide sufficient information to the State Air Resources Board and the Energy Commission to demonstrate significant barriers to the adoption of zero-emission technology at the time of application, and that alternate approaches to decrease internal combustion vehicle use are not appropriate, the State Air Resources Board and the Energy Commission may fund schoolbuses powered by renewable fuel under this section, to the extent and in the time period that these barriers apply to the local educational agency.

(f) Priority shall be given to grantees serving a high percentage of unduplicated pupils, as defined in Section 42238.02 of the Education Code, grantees operating the oldest internal combustion buses, grantees that are small and rural school districts, and grantees purchasing zero-emission buses with bidirectional charging where available.

(g) The State Air Resources Board and the Energy Commission shall create program guidelines relative to their respective activities. Notwithstanding any other law, the Administrative Procedure Act (Chapter 3.5 (commencing with Section 11340) of Part 1 of Division 3 of Title 2 of the Government Code) shall not apply to the development and approval of the guidelines or other standards or requirements adopted or used by the State Air Resources Board or the Energy Commission in administering these funds.

(h) No less than 90 percent of a grantee's grant award shall be expended for the purchase of zero-emission schoolbuses, as well as the supporting charging infrastructure needed to operate the zero-emission schoolbuses and related activities, including, but not limited to, charging or fueling stations, equipment, site design, construction, and related infrastructure upgrades.

(i) Up to 10 percent of a grantee's grant award may be expended to incorporate or supplement funding for the grantee's school transportation program.

Section 121 of AB 181 (Ch. 52, Statutes of 2022), as amended by Section 96 of SB 114 (Ch. 48, Statutes of 2023)

(j) (1) Any schoolbuses that are replaced pursuant to this section shall be scrapped no later than 24 months from date of delivery of the replacement vehicles. Grantees shall provide to the State Air Resources Board proof of scrap of the retired internal combustion schoolbus or schoolbuses.

(2) The grant agreement related to the grant award shall require grantees to submit schoolbus and infrastructure information and documentation resulting from the grants provided in this section to the State Air Resources Board and the Energy Commission.

(k) The Department of General Services, in consultation with the Energy Commission and the California Workforce Development Board, shall establish statewide contracts with manufacturers of zero- or low-emission schoolbuses. These contracts shall satisfy the high road standards pursuant to subdivision (r) of Section 14005 of the Unemployment Insurance Code.

(l) As a condition of entering into a statewide contract with the state, a bidder shall incorporate high road job standards designed to achieve all of the following goals:

(1) Support the creation and retention of quality, nontemporary, and full-time jobs that provide high wages, including benefits and access to training.

(2) Support the hiring of displaced workers and individuals facing barriers to employment.

(3) Encourage the development of the state's long-term, climate-sustainable transportation and related infrastructure and manufacturing sectors.

(4) Protect public health by supporting the adoption of specific protections for worker health and safety.

(m) At a minimum, the contract shall include all of the following terms:

(1) All of the bidder's employees performing work to fulfill the contract shall be paid no less than the minimum trainee wage set by the Employment Training Panel for the county in which the work is performed, or the applicable federal, state, or local minimum wage, whichever is greater. To the extent permissible, health care benefits valued at up to two dollars and fifty cents (\$2.50) per hour may be used to meet this wage requirement.

(2) Any person performing work to fulfill the contract shall be placed in the proper employment classification. This requirement includes, but is not limited to, prohibitions on misclassifying a person performing work to fulfill the contract as an independent contractor.

(3) The bidder and any contractors and subcontractors performing work to fulfill the contract shall comply with all applicable federal, state, and local laws pertaining to paid sick leave, including any antiretaliation provisions contained in such laws.

(4) The bidder and any contractors and subcontractors performing work to fulfill the contract shall comply with all applicable safety and health requirements, and shall comply with Sections 6310 and 6311 of the Labor Code, pertaining to protection of employees who file complaints or refuse to work in the face of hazardous conditions.

(5) The bidder and any contractors and subcontractors comply and shall comply with the federal Americans with Disabilities Act (42 U.S.C. Sec. 12101 et seq.) and all regulations thereunder.

(n) Grants received pursuant to this section shall supplement, not supplant, existing services and funds provided by grantees in support of transportation programs.

(o) For purposes of this section, the following definitions apply:

(1) "Bidder" means a manufacturer of zero-emission schoolbuses that seeks to enter into a statewide contract with the Department of General Services pursuant to this section.

(2) "Energy Commission" means the State Energy Resources Conservation and Development Commission.

(3) "Local educational agency" means any of the following:

(A) A school district, county office of education, or charter school, excluding a charter school classified as a nonclassroom-based charter school as of the 2021–22 fiscal year second principal apportionment certification pursuant to Section 47612.5 of the Education Code, with ownership of title for a schoolbus or schoolbuses.

(B) A school district or charter school, excluding a charter school classified as a nonclassroom-based charter school as of the 2021–22 fiscal year second principal apportionment certification pursuant to Section 47612.5 of the Education Code, that contracts with a county office of education or private contractor for the maintenance and operation of its schoolbuses.

(C) A county office of education that contracts with a private contractor for maintenance and operation of its schoolbuses.

(D) A joint powers authority currently operating home-to-school transportation programs on behalf of school districts, county offices of education, or charter schools, excluding charter schools classified as a nonclassroom-based charter school as of the 2021–22 fiscal year second principal apportionment certification pursuant to Section 47612.5 of the Education Code.

(4) "Rural school district" means a school district with a school with a locale code of 31, 32, 33, 41, 42, or 43, as classified by the National Center for Education Statistics.

(5) "Small school district" means a school district with fewer than 2,501 units of average daily attendance using the most recently reported annual data in the California Longitudinal Pupil Attendance Data System.

(p) If a participating charter school acquires a schoolbus pursuant to this section and the charter school subsequently ceases operation, the schoolbus shall be made available to the State Air Resources Board for reallocation to other eligible local educational agencies.

(q) For purposes of making the computations required by Section 8 of Article XVI of the California Constitution, the appropriations made by paragraphs (1) and (2) of subdivision (a) shall be deemed to be "General Fund revenues appropriated for school districts," as defined in subdivision (c) of Section 41202 of the Education Code, for the 2021–22 fiscal year, and included within the "total allocations to school districts and community college districts from General Fund proceeds of taxes appropriated pursuant to Article XIII B," as defined in subdivision (e) of Section 41202 of the Education Code, for the 2021–22 fiscal year.

(r) The provisions of this section are severable. If any provision of this section or its application is held invalid, that invalidity shall not affect other provisions or applications that can be given effect without the invalid provision or application.

CALIFORNIA SCHOOL DASHBOARD PERFORMANCE DATA

Section 123 of AB 130 (Ch. 44, Statutes of 2021), as amended by Section 104 of AB 181 (Ch. 52, Statutes of 2022)

(a) Notwithstanding subdivision (f) of Section 52064.5 of the Education Code, the State Department of Education shall not publish the California School Dashboard in December 2021 based on performance data on the state and local indicators included in the evaluation rubrics adopted by the State Board of Education.

(b) Notwithstanding Section 60630 of the Education Code, the State Department of Education shall publish any valid and reliable data collected through the California Longitudinal Pupil Achievement Data System or through the collection of local indicator data pursuant to Chapter 10 (commencing with Section 60900) of Part 33 of Division 4 of Title 2 of the Education Code that would have been included in the 2021 California School Dashboard on the DataQuest internet website or by other means.

(c) Notwithstanding Section 52064.5 of the Education Code or any other law, the State Department of Education shall not identify local educational agencies in the 2021–22 school year for technical assistance or intervention pursuant to Sections 47607.3, 52071, 52071.5, 52072, and 52072.5 of the Education Code. A local educational agency identified for technical assistance or intervention based on the 2019 California School Dashboard shall retain that identification until the release of the 2022 California School Dashboard.

(d) For purposes of identifying local educational agencies for technical assistance or intervention pursuant to Sections 47607.3, 52071, 52071.5, 52072, and 52072.5 of the Education Code in December 2022, the State Department of Education shall use performance data on the state and local indicators using data from the 2021–22 school year, with the exception of English Language Proficiency Assessments for California data from the 2020–21 school year for the purposes of producing status for the English Learner Progress Indicator. For purposes of identifying local educational agencies pursuant to Section 52072 of the Education Code, notwithstanding subdivision (b) of paragraph (1) of Section 52072 of the Education Code, the State Department of Education shall do each of the following:

(1) In December 2022, use performance data on the state and local indicators from the 2017, 2018, 2019, and 2022 California School Dashboards.

(2) In December 2023, use performance data on the state and local indicators from the 2018, 2019, 2022, and 2023 California School Dashboards.

(3) In December 2024, use performance data on the state and local indicators from the 2019, 2022, 2023, and 2024 California School Dashboards.

ARTS, MUSIC AND INSTRUCTIONAL MATERIALS BLOCK GRANT

Section 134 of AB 181 (Ch. 52, Statutes of 2022), as amended by Section 56 of AB 185 (Ch. 571, Statutes of 2022), and as further amended by Section 102 of SB 114 (Ch. 48, Statutes of 2023)

(a) For the 2022–23 fiscal year, the sum of three billion five hundred sixty million eight hundred eighty-five thousand dollars (\$3,560,885,000) is hereby appropriated from the General Fund to the State Department of Education to establish the Arts, Music, and Instructional Materials Discretionary Block Grant, for allocation to county offices of education, school districts, charter schools, and the state special schools to:

(1) Obtain standards-aligned professional development and instructional materials, in the following subject areas:

(A) Visual and performing arts.

(B) World languages.

(C) Mathematics.

(D) Science, including environmental literacy.

Section 123 Changes to California School Dashboard performance data

Section 134 Arts, Music and Instructional Materials Block Grant

Broad use of funds

Section 134
Arts, Music and Instructional
Materials Block Grant

(continued)

	<p>(E) English language arts, including early literacy.</p> <p>(F) Ethnic studies.</p> <p>(G) Financial literacy, including the content specified in Section 51284.5 of the Education Code.</p> <p>(H) Media literacy.</p> <p>(I) Computer science.</p> <p>(J) History-social science.</p> <p>(2) Obtain instructional materials and professional development aligned to best practices for improving school climate, including training on deescalation and restorative justice strategies, asset-based pedagogies, antibias, transformative social-emotional learning, media literacy, digital literacy, physical education, and learning through play.</p> <p>(3) Develop diverse book collections and obtain culturally relevant texts, including leveled texts, in both English and pupils' home languages, to support pupils' independent reading. It is the intent of the Legislature that these book collections and culturally relevant texts be used to provide support for pupils through the establishment of site-based school and classroom libraries that are culturally relevant to pupils' home and community experiences and be available in English, pupils' home language, or a combination of more than one language.</p> <p>(4) Operational costs, including but not limited to, retirement and health care cost increases.</p> <p>(5) As related to the COVID-19 pandemic, acquire personal protective equipment, masks, cleaning supplies, COVID-19 tests, ventilation upgrades, and other similar expenditures, if they are necessary to keep pupils and staff safe from COVID-19 and schools open for in-person instruction.</p>
Automatic allocation of grant funds	<p>(b) The Superintendent of Public Instruction shall apportion funds proportionally to county offices of education, school districts, charter schools, and the state special schools on the basis of an equal amount per unit of average daily attendance for kindergarten and grades 1 to 12, inclusive, as those numbers were reported as of the second principal apportionment for the 2021–22 fiscal year. The average daily attendance for each state special school shall be deemed to be 97 percent of the enrollment as reported in the California Longitudinal Pupil Achievement Data System as of the 2021–22 Fall 1 Submission.</p>
Expenditure deadline	<p>(c) Funding appropriated pursuant to this section shall be available for encumbrance through the 2025–26 fiscal year. Local educational agencies are encouraged, but not required, to proportionally use resources received pursuant to this section for the purposes noted in paragraphs (1) to (5), inclusive, of subdivision (a) and to support arts and music education programs.</p> <p>(d) For purposes of this section, standards-aligned instructional materials includes, but is not limited to, books for school and classroom libraries.</p>
Plan for use of funds	<p>(e) The governing board or body of each school district, county office of education, or charter school receiving funds pursuant to this section shall discuss and approve a plan for the expenditure of funds received pursuant to this section at a regularly scheduled public meeting. It is the intent of the Legislature that each school district, county office of education, or charter school expend any resources received pursuant to this section consistent with their governing board- or body-approved plan.</p> <p>(f) The requirements of this section shall not be waived by the State Board of Education pursuant to Section 33050 of the Education Code or any other law.</p> <p>(g) (1) For purposes of making the computations required by Section 8 of Article XVI of the California Constitution, of the amount appropriated from the General Fund in subdivision (a), one hundred forty-nine million forty thousand dollars (\$149,040,000) shall be deemed to be "General Fund revenues appropriated for school districts," as defined in subdivision (c) of Section 41202 of the Education Code, for the 2022–23 fiscal year, and included within the "total allocations to school districts and community college districts from General Fund proceeds of taxes appropriated pursuant to Article XIII B," as defined in subdivision (e) of Section 41202 of the Education Code, for the 2022–23 fiscal year.</p> <p>(2) For purposes of making the computations required by Section 8 of Article XVI of the California Constitution, of the amount appropriated from the General Fund in subdivision (a), two billion eight hundred eighty-one million two hundred nineteen thousand dollars (\$2,881,219,000) shall be deemed to be "General Fund revenues appropriated for school districts," as defined in subdivision (c) of Section 41202 of the Education Code, for the 2021–22 fiscal year, and included within the "total allocations to school districts and community college districts from General Fund proceeds of taxes appropriated pursuant to Article XIII B," as defined in subdivision (e) of Section 41202 of the Education Code, for the 2021–22 fiscal year.</p> <p>(3) For purposes of making the computations required by Section 8 of Article XVI of the California Constitution, of the amount appropriated from the General Fund in subdivision (a), three hundred thirty million six hundred twenty-six thousand dollars (\$330,626,000) shall be deemed to be "General Fund revenues appropriated for school districts," as defined in subdivision (c) of Section 41202 of the Education Code, for the 2020–21 fiscal year, and included within the "total allocations to school districts and community college districts from General Fund proceeds of taxes appropriated pursuant to Article XIII B," as defined in subdivision (e) of Section 41202 of the Education Code, for the 2020–21 fiscal year.</p>

ARTS AND MUSIC IN SCHOOLS – FUNDING GUARANTEE AND ACCOUNTABILITY ACT

Education Code

Section 8820 Conditions for and use of funding

(a) The Arts and Music in Schools—Funding Guarantee and Accountability Act is hereby established for the purpose of providing a minimum source of annual funding K–12 public schools, including public charter schools, to supplement arts education programs for pupils attending those schools.

(b) (1) Commencing with the first fiscal year following enactment of this act, and for each fiscal year thereafter, there shall be continuously appropriated without regard to fiscal years from the General Fund to the department for the purposes of this chapter, an amount which is equal to 1 percent of the total state and local revenues received by local educational agencies in the preceding fiscal year that are included in the calculation of the minimum funding guarantee established by Sections 8 and 8.5 of Article XVI of the California Constitution, excluding the appropriation made pursuant to this chapter.

(2) The Director of Finance shall calculate and publish the amount required to be appropriated by this chapter as part of the annual May Revision of the Governor's Budget. The amount required to be appropriated by this chapter for each subsequent fiscal year shall be considered final as of the annual May Revision of the Governor's Budget for the subsequent fiscal year. The Director of Finance shall publish the required appropriation amount by January 10 each fiscal year as part of the director's duties pursuant to subdivision (d) of Section 41206.01.

(3) Notwithstanding any other law, for purposes of making the computations required by subdivision (b) of Section 8 of Article XVI of the California Constitution:

(A) For the first fiscal year following enactment of this chapter, the appropriations made pursuant to this subdivision shall be deemed supplementary payments in excess of the minimum amount required for that fiscal year pursuant to Section 8 of Article XVI of the California Constitution and shall not be considered towards fulfilling the requirements of Section 8 of Article XVI of the California Constitution for that fiscal year.

(B) For subsequent fiscal years, the appropriations made pursuant to this subdivision shall be considered moneys that were allocated to school districts from General Fund proceeds of taxes ap-proriated pursuant to Article XIII B of the California Constitution.

(C) Commencing with the second fiscal year following the enactment of this act, and each fiscal year thereafter, "the percentage of General Fund revenues appropriated for school districts and community college districts, respectively, in fiscal year 1986–87," for purposes of paragraph (1) of subdivision (b) of Section 8 of Article XVI of the California Constitution, shall be deemed to be the percentage of General Fund revenues that would have been appropriated for those entities if the share of the General Fund of the supplementary payments calculated pursuant to this subdivision in the prior fiscal year had been included in the percentage of General Fund revenues appropriated for school districts and community college districts, respectively, in fiscal year 1986–87.

(c) Funds appropriated pursuant to this chapter shall be allocated by the department to each local educational agency as the sum of the amount calculated pursuant to paragraph (1) and the amount calculated pursuant to paragraph (2) for each schoolsite in that local educational agency, as follows:

(1) An amount equal to the product of 70 percent of the funding appropriated in subdivision (b) times the school's enrollment in the prior fiscal year, divided by the total statewide enrollment in the prior fiscal year of local educational agencies.

(2) An amount equal to the product of 30 percent of the funds appropriated in subdivision (b) times the school's enrollment of economically disadvantaged pupils in the prior fiscal year, divided by the total statewide enrollment of economically disadvantaged pupils in the prior fiscal year of local educational agencies. For schools serving preschool pupils, the enrollment of economically disadvantaged preschool pupils shall be deemed to equal the enrollment of preschool pupils in the prior fiscal year times the same percentage of pupils that are economically disadvantaged at the elementary schoolsite with the highest percentage of economically disadvantaged pupils in the prior year within the preschool's local educational agency. If there is no elementary school within the preschool's local educational agency, the enrollment of economically disadvantaged preschool pupils shall be deemed to equal the enrollment of preschool pupils in the prior fiscal year times the same percentage of pupils that are economically disadvantaged at the elementary schoolsite with the highest percentage of economically disadvantaged pupils in the prior year within the preschool's county.

(d) Local educational agencies shall allocate to each schoolsite an amount equal to the sum of the amount calculated pursuant to paragraph (1) of subdivision (c) and the amount calculated pursuant to paragraph (2) of subdivision (c).

(e) For each schoolsite or preschool, the principal or program director shall develop an expenditure plan for the funds allocated pursuant to subdivision (d).

(f) (1) Funds allocated pursuant to subdivision (d) shall be available for use for up to three fiscal years after which time the unexpended funds shall be reverted to the department, which shall reallocate those funds to all local educational agencies in the following fiscal year pursuant to subdivision (c).

(2) Local educational agencies are required to report to the department the amount of unexpended funds by October 1 following the conclusion of the expenditure period pursuant to paragraph (1).

Section 8820
Conditions for and use of funding

(continued)

If a charter school ceases to operate, a final expenditure report shall be due to the department within 60 days of the effective date of closure and the department shall collect any unexpended amounts.

(3) The department may withhold the release of a local educational agency's allocation pursuant to this section for the fiscal year in which the expenditure report required by paragraph (2) is due until that local educational agency has submitted the required expenditure report.

(g) As a condition of receipt of funds pursuant to this chapter, a local educational agency shall annually:

(1) Certify that all funds will be used to provide arts education programs, and that funds expended in the prior fiscal year were, in fact, used for those purposes, except as provided in paragraph (3). For local educational agencies with an enrollment of 500 or more pupils, the certification shall also ensure that at least 80 percent of funds to be expended will be used to employ certificated or classified employees to provide arts education program instruction and that the remaining funds will be used for training, supplies and materials, and arts educational partnership programs.

(2) Certify that such funds received will be used to supplement funding for arts education programs and that funds expended in the prior fiscal year were, in fact, used to supplement arts education programs.

(3) Certify that no more than 1 percent of funds received will be used for a local educational agency's administrative expenses to implement this chapter and that funds received in the prior fiscal year were, in fact, used within that limit.

(4) Submit an annual board- or body-approved report in a manner determined by the Superintendent, that shall be posted on the local educational agency's and the department's internet websites and that details the type of arts education programs funded by the program, the number of full-time equivalent teachers, classified personnel, and teaching aides, the number of pupils served, and the number of schoolsites providing arts education programs with those funds.

(h) The department may, for good cause shown, provide a waiver from the requirement pursuant to paragraph (1) of subdivision (g) upon written request from the local educational agency.

(i) Annual audits conducted in accordance with Section 41020 shall include all funds received and distributed by the local educational agency pursuant to this section, and shall include a determination of whether the funds were expended pursuant to the certifications submitted and the requirements of this section.

(j) The Legislature may reduce the annual appropriation required by this chapter if the Legislature suspends the operation of Proposition 98 by the enactment of an urgency statute pursuant to subdivision (h) of Section 8 of Article XVI of the California Constitution. The percent of the reduction in the annual appropriation required by this chapter shall not exceed the percent of reduction in funding provided to K-12 schools and community colleges for the fiscal year below the funding level of minimum guarantee that would have been provided pursuant to Section 8 of Article XVI of the California Constitution if the suspension of the operation of Proposition 98 had not occurred.

(k) Nothing in this section prohibits the Legislature from appropriating funds for the program in excess of this minimum annual appropriation.

Section 8821
Definitions

(a) "Arts education program" includes, but is not limited to, instruction and training, supplies, materials, and arts educational partnership programs, for instruction in: dance, media arts, music, theatre, and visual arts, including folk art, painting, sculpture, photography, and craft arts, creative expressions, including graphic arts and design, computer coding, animation, music composition and ensembles, and script writing, costume design, film, and video.

(b) "Economically disadvantaged pupil" means a pupil who is eligible for the federal National School Lunch Act (42 U.S.C. Sec. 1751 et seq.) or any successor program.

(c) "Enrollment" means every preschool, transitional kindergarten, and K-12 pupil enrolled in a local educational agency and schoolsite. A "preschool pupil" means a pupil enrolled in the California state preschool program or a pupil three years of age through five years of age enrolled in a preschool program for pupils with exceptional needs in a local educational agency.

(d) "Local educational agency" includes K-12 school districts, county offices of education, charter schools, and the California school for the blind and the California school for the deaf.

(e) "Supplement" means that the funds appropriated by this chapter shall be used by local educational agencies to increase funding of arts education programs and not to supplant existing funding for those programs.

LITERACY COACHES AND READING SPECIALISTS GRANT PROGRAM

Section 137 of AB 181 (Ch. 52, Statutes of 2022), as amended by Section 57 of AB 185 (Ch. 571, Statutes of 2022), and as further amended by Section 24 of SB 141 (Ch. 194, Statutes of 2023)

(a) The sum of two hundred fifty million dollars (\$250,000,000) is hereby appropriated from the General Fund to the Superintendent of Public Instruction for the Literacy Coaches and Reading Specialists Grant Program, which is hereby established, in the manner and for the purposes set forth in this section. Funds appropriated for this purpose are available for encumbrance through June 30, 2027.

(b) (1) Of the amount appropriated in subdivision (a), two hundred twenty-five million (\$225,000,000) shall be allocated by the Superintendent of Public Instruction to local educational agencies for schools eligible pursuant to paragraph (2), to develop school literacy programs, employ and train literacy coaches and reading and literacy specialists, and develop and implement interventions for pupils in need of targeted literacy support. Local educational agencies may opt not to participate in the program described pursuant to this subdivision by informing the State Department of Education, by September 30, 2022, and via a form provided by the State Department of Education, of their intent to decline program funds for their eligible schoolsites. Local educational agencies who receive funding pursuant to this section may also be eligible for the Reading and Literacy Supplementary Authorization Incentive Grant Program.

(2) Of the amount identified in paragraph (1), the department shall compute an amount per pupil enrolled in kindergarten or any of grades 1 to 3, inclusive, at each eligible schoolsite, such that no local educational agency shall receive less than four hundred fifty thousand dollars (\$450,000) per eligible schoolsite. Grant amounts shall be determined using 2021–22 school enrollment data determined as of the California Longitudinal Pupil Achievement Data System Fall 1 Certification. Local educational agencies receiving an allocation of funds pursuant to this paragraph are encouraged to use these funds over the full grant period, through June 30, 2027. For purposes of allocations and apportionments under this paragraph, a locally-funded charter school shall be included with the chartering authority.

(3) On or before June 30, 2024, a recipient local educational agency shall submit an interim report to the State Department of Education, and a final report on or before June 30, 2027, detailing how it used funds awarded pursuant to this subdivision. The State Department of Education shall create a reporting template for the purposes of this requirement no later than December 31, 2022. Specifically, these reports shall include:

(A) How funds were used to employ literacy coaches and reading and literacy specialists for its eligible schools.

(B) How funds were used to develop and implement school literacy programs.

(C) How expenditures impacted pupils' literacy achievement, including for pupil subgroups.

(D) How the local educational agency plans to continue to fund literacy coaches and reading and literacy specialists past the award period.

(E) Other metrics as determined by the State Department of Education.

(4) On or before July 30, 2024, and again on or before July 30, 2027, the Superintendent of Public Instruction shall provide the interim and final reports submitted by recipient local educational agencies to the grantee selected pursuant to subdivision (c) for an independent evaluation pursuant to subdivision (c) of Section 115 of Chapter 48 of the Statutes of 2023.

(5) On or before December 31, 2025, and again on or before December 31, 2028, the Superintendent of Public Instruction shall provide a comprehensive report to the Department of Finance, State Board of Education, and the appropriate policy and fiscal committees of both houses of the Legislature summarizing the data collected pursuant to paragraph (3) of this subdivision and paragraph (3) of subdivision (b) of Section 115 of Chapter 48 of the Statutes of 2023.

(c) (1) Of the funds appropriated pursuant to subdivision (a), twenty-five million dollars (\$25,000,000) shall be available for the Superintendent of Public Instruction, in collaboration with the Commission on Teacher Credentialing, and subject to the approval of the executive director of the State Board of Education, to select a county office of education, through a competitive process, to develop and provide training for educators to become literacy coaches and reading and literacy specialists. The Superintendent of Public Instruction shall prioritize applicants with demonstrated success in improving literacy, especially among underperforming pupil subgroups, as well as for those planning on partnering with institutions of higher education with demonstrated success in providing statewide professional development for expert literacy practice. Applicants who participate in the training established pursuant to this subdivision may also participate in the Reading and Literacy Supplementary Authorization Incentive Grant Program.

(2) The grantee selected pursuant to paragraph (1) shall consider the preparation program standards set by the Commission on Teacher Credentialing for reading and literacy in developing the standards for educator training developed pursuant to this subdivision.

(d) For purposes of this section, the following definitions apply:

(1) "Eligible schoolsite" means an elementary schoolsite operated by a local educational agency with an unduplicated pupil percentage of 97 percent or greater for pupils enrolled in kindergarten and grades 1 to 3, inclusive, based on 2021–22 Fall 1 census day pupil data submitted through the California Longitudinal Pupil Achievement Data System. The unduplicated pupil percentage

**Section 137
Literacy Coaches and Reading
Specialists Grant Program**

Expenditure Deadline

Automatic allocation of grant funds based on TK-3 pupils

Opt out by September 30, 2022

Report due June 30, 2024

Definitions

Section 137
Literacy Coaches and Reading
Specialists Grant Program
(continued)

for a schoolsite shall be calculated by the sum of the number of unduplicated pupils eligible for free and reduced-price meals, English language learners, and youth in foster care, divided by each schoolsite's total enrollment for kindergarten and grades 1 to 3, inclusive.

(2) "Employ" means that a local educational agency, to the extent feasible, will hire a new literacy coach, reading specialist, or both, train existing staff to become a literacy coach, or support existing staff in obtaining a reading specialist credential or authorization. Funds shall not be used to support the salaries of existing literacy coaches and reading specialists.

(3) "Local educational agency" means an elementary or unified school district, county office of education, or charter school.

(4) "School" and "schoolsites" means an elementary school of a local educational agency.

(5) "School literacy program" means a program that includes all of the following:

(A) A school literacy plan that includes goals and actions to improve literacy acquisition for pupils in preschool, if applicable, and kindergarten or any of grades 1 to 3, inclusive. The plan shall identify metrics to measure progress toward the goals and actions.

(B) At least one literacy coach or reading and literacy specialist per school to support educators and pupils in improving literacy instruction and pupil outcomes.

(C) Increased access to evidence-based literacy instruction, through strategies, including, but not limited to, any of the following:

(i) Providing bilingual reading specialists to support dual language acquisition and English language development programs.

(ii) Developing and implementing culturally responsive curriculum and instruction.

(iii) Providing professional development for educators and school leaders in literacy instruction and the use of data to identify and support struggling pupils.

(iv) Providing professional development for educators and school leaders regarding implementation of the curriculum framework for English Language Arts/English Language Development adopted by the State Board of Education pursuant to Section 60207 of the Education Code and the use of data to support effective instruction.

(v) Establishing an evidence-based family literacy initiative, which may include, but is not limited to, any of the following:

(I) Family literacy plans that identify literacy and biliteracy goals, benchmarks, and roles for all family members.

(II) Family literacy home visiting programs, including, but not limited to, "promotora" family literacy outreach specialists. Local educational agencies may establish literacy and biliteracy home visits to engage families in how to best support their pupils and every family member in reaching their literacy goals.

(III) Extended-day, summer, or weekend family institutes related to literacy and biliteracy. Local educational agencies are encouraged to work with in-house expanded learning programs to establish literacy and biliteracy support programs and literacy enrichment programs during after school, weekend, and summer hours.

(IV) Public library family literacy partnerships, including, but not limited to, digital tools to support whole family literacy.

(e) For purposes of making the computations required by Section 8 of Article XVI of the California Constitution, the appropriation made pursuant to subdivision (a) shall be deemed to be "General Fund revenues appropriated for school districts," as defined in subdivision (c) of Section 41202 of the Education Code, for the 2020–21 fiscal year, and included within the "total allocations to school districts and community college districts from General Fund proceeds of taxes appropriated pursuant to Article XIII B," as defined in subdivision (e) of Section 41202 of the Education Code, for the 2020–21 fiscal year.

Section 115 of SB 114 (Ch. 48,
Statutes of 2023)
Reporting Obligations under the
Literacy Coaches and Reading
Specialists Grant Program

(a) The sum of two hundred fifty million dollars (\$250,000,000) is hereby appropriated from the General Fund to the Superintendent of Public Instruction to augment the Literacy Coaches and Reading Specialists Grant Program, established pursuant to Section 137 of Chapter 52 of the Statutes of 2022, as amended by Section 104 of the act adding this section. Funds appropriated for this purpose are available for encumbrance through June 30, 2028.

(b) (1) Of the amount appropriated in subdivision (a), two hundred forty-eight million dollars (\$248,000,000) shall be allocated by the Superintendent of Public Instruction to local educational agencies for schools eligible pursuant to paragraph (2), to develop school literacy programs, employ and train literacy coaches and reading and literacy specialists, and develop and implement interventions for pupils in need of targeted literacy support. Local educational agencies may opt not to participate in the program described pursuant to this subdivision by informing the State Department of Education, by September 30, 2023, and via a form provided by the State Department of Education, of their intent to decline program funds for their eligible schoolsites. Local educational agencies who receive funding pursuant to this section may also be eligible for the Reading and Literacy Supplementary Authorization Incentive Grant Program.

(2) Of the amount identified in paragraph (1), the State Department of Education shall compute an amount per pupil enrolled in kindergarten or any of grades 1 to 3, inclusive, at each eligible

May 1 charter response

schoolsite, in a manner that also ensures that no local educational agency shall receive less than four hundred fifty thousand dollars (\$450,000) per eligible schoolsite. Grant amounts shall be determined using 2022–23 school enrollment data determined as of the California Longitudinal Pupil Achievement Data System Fall 1 Certification. Local educational agencies receiving an allocation of funds pursuant to this paragraph are encouraged to use these funds over the full grant period, through June 30, 2028. For purposes of allocations and apportionments under this paragraph, a locally funded charter school shall be included with the chartering authority.

(3) On or before June 30, 2025, a recipient local educational agency receiving funds pursuant to this section shall submit an interim report to the State Department of Education, and a final report on or before June 30, 2028, detailing how it used funds awarded pursuant to this subdivision. The State Department of Education shall use the existing reporting template described in paragraph (3) of subdivision (b) of Section 137 of Chapter 52 of the Statutes of 2022, as amended by Section 104 of the act adding this section, for the purposes of this requirement. Specifically, these reports shall include all of the following:

(A) How funds were used to employ literacy coaches and reading and literacy specialists for its eligible schools.

(B) How funds were used to develop and implement school literacy programs.

(C) How expenditures impacted pupils' literacy achievement, including for pupil subgroups.

(D) How the local educational agency plans to continue to fund literacy coaches and reading and literacy specialists beyond the award period.

(E) Other metrics as determined by the State Department of Education.

(4) On or before July 30, 2025, and again on or before July 30, 2028, the Superintendent of Public Instruction shall provide the interim and final reports submitted by recipient local educational agencies to the grantee selected pursuant to subdivision (c) of Section 137 of Chapter 52 of the Statutes of 2022, as amended by Section 104 of the act adding this section, for the independent evaluation pursuant to subdivision (c).

(5) On or before December 31, 2025, and again on or before December 31, 2028, the Superintendent of Public Instruction shall provide a comprehensive report to the Department of Finance, State Board of Education, and the appropriate policy and fiscal committees of both houses of the Legislature summarizing the data collected pursuant to paragraph (3) of this subdivision and paragraph (3) of subdivision (b) of Section 137 of Chapter 52 of the Statutes of 2022, as amended by Section 104 of the act adding this section.

(c) (1) Of the funds appropriated pursuant to subdivision (a), two million dollars (\$2,000,000) shall be available to the grantee selected pursuant to subdivision (c) of Section 137 of Chapter 52 of the Statutes of 2022, as amended by Section 104 of the act adding this section, to provide additional training for educators to become literacy coaches and reading and literacy specialists, consistent with the training developed for the Literacy Coaches and Reading Specialists Grant program pursuant to Section 137 of Chapter 52 of the Statutes of 2022, as amended by Section 104 of the act adding this section, and to contract for an independent evaluation pursuant to paragraph (2).

(2) The grantee selected pursuant to subdivision (c) of Section 137 of Chapter 52 of the Statutes of 2022, as amended by Section 104 of the act adding this section, shall, in consultation with, and subject to the approval of, the executive director of the State Board of Education and the Superintendent of Public Instruction, issue a request for proposals and contract for an independent evaluation of the effectiveness of the funding provided pursuant to this section, as well as the funding appropriated pursuant to Section 137 of Chapter 52 of the Statutes of 2022, as amended by Section 104 of the act adding this section. The grantee shall use up to five hundred thousand dollars (\$500,000) of the funding appropriated pursuant to paragraph (1) for the independent evaluation.

(3) The evaluation conducted pursuant to paragraph (2) shall include an examination of the following:

(A) Data collected from recipient local educational agencies pursuant to subdivision (b) of this section and subdivision (b) of Section 137 of Chapter 52 of the Statutes of 2022, as amended by Section 104 of the act adding this section, including, but not limited to, the following:

(i) How funds were used to employ literacy coaches and reading and literacy specialists.

(ii) How funds were used to develop and implement school literacy programs.

(iii) How expenditures impacted pupils' literacy achievement, including for pupil subgroups.

(iv) How the local educational agencies plan to continue to fund literacy coaches and reading and literacy specialists beyond the award period.

(B) How the trainings developed and provided by the grantee selected pursuant to subdivision (c) of Section 137 of Chapter 52 of the Statutes of 2022, as amended by Section 104 of the act adding this section, impacted the training of literacy coaches and literacy and reading specialists.

(4) On or before June 30, 2029, the grantee selected pursuant to subdivision (c) of Section 137 of Chapter 52 of the Statutes of 2022, as amended by Section 104 of the act adding this section, shall provide the evaluation report to the chairs of the relevant policy committees and budget subcommittees of the Legislature, the executive director of the State Board of Education or their designee, the Superintendent of Public Instruction, and the Director of Finance.

**Section 115 of SB 114 (Ch. 48,
Statutes of 2023)
Reporting Obligations under the
Literacy Coaches and Reading
Specialists Grant Program**
(continued)

(d) For purposes of this section, the following definitions apply:

(1) "Eligible schoolsite" means an elementary schoolsite operated by a local educational agency with an unduplicated pupil percentage of 95 percent or greater for pupils enrolled in kindergarten and grades 1 to 3, inclusive, based on 2022–23 Fall 1 census day pupil data submitted through the California Longitudinal Pupil Achievement Data System that did not receive funding pursuant to Section 137 of Chapter 52 of the Statutes of 2022, as amended by Section 104 of the act adding this section. The unduplicated pupil percentage for a schoolsite shall be calculated by the sum of the number of unduplicated pupils eligible for free and reduced-price meals, English language learners, and youth in foster care, divided by each schoolsite's total enrollment for kindergarten and grades 1 to 3, inclusive.

(2) "Local educational agency" means an elementary or unified school district, county office of education, or charter school.

(3) "School" and "schoolsite" means an elementary school of a local educational agency.

(4) "School literacy program" means a program that includes all of the following:

(A) A school literacy plan that includes goals and actions to improve literacy acquisition for pupils in preschool, if applicable, and kindergarten or any of grades 1 to 3, inclusive. The plan shall identify metrics to measure progress toward the goals and actions.

(B) At least one literacy coach or reading and literacy specialist per school to support educators and pupils in improving literacy instruction and pupil outcomes.

(C) Increased access to evidence-based literacy instruction through strategies, including, but not limited to, any of the following:

(i) Providing bilingual reading specialists to support dual language acquisition and English language development programs.

(ii) Developing and implementing culturally responsive curriculum and instruction.

(iii) Providing professional development for educators and school leaders in literacy instruction and the use of data to identify and support struggling pupils.

(iv) Providing professional development for educators and school leaders regarding implementation of the curriculum framework for English language arts and English language development adopted by the State Board of Education pursuant to Section 60207 of the Education Code and the use of data to support effective instruction.

(v) Establishing an evidence-based family literacy initiative, which may include, but is not limited to, any of the following:

(I) Family literacy plans that identify literacy and biliteracy goals, benchmarks, and roles for all family members.

(II) Family literacy home visiting programs, including, but not limited to, "promotora" family literacy outreach specialists. Local educational agencies may establish literacy and biliteracy home visits to engage families in how to best support their pupils and every family member in reaching their literacy goals.

(III) Extended-day, summer, or weekend family institutes related to literacy and biliteracy. Local educational agencies are encouraged to work with in-house expanded learning programs to establish literacy and biliteracy support programs and literacy enrichment programs during after school, weekend, and summer hours.

(IV) Public library family literacy partnerships, including, but not limited to, digital tools to support whole family literacy.

(e) For purposes of making the computations required by Section 8 of Article XVI of the California Constitution, the appropriation made pursuant to subdivision (a) shall be deemed to be "General Fund revenues appropriated for school districts," as defined in subdivision (c) of Section 41202 of the Education Code, for the 2021–22 fiscal year, and included within the "total allocations to school districts and community college districts from General Fund proceeds of taxes appropriated pursuant to Article XIII B," as defined in subdivision (e) of Section 41202 of the Education Code, for the 2021–22 fiscal year.

**CHARTER SCHOOL BOARD ETHICS TRAINING
Government Code**

For purposes of this article, the following definitions apply:

(a) "Legislative body" has the same meaning as specified in Section 54952.

(b) "Local agency" means a city, county, city and county, charter city, charter county, charter city and county, school district, county office of education, charter school, or special district.

(c) "Local agency official" means any of the following:

(1) A member of a local agency legislative body or an elected local agency official who receives any type of compensation, salary, or stipend or reimbursement for actual and necessary expenses incurred in the performance of official duties.

(2) An employee designated by a local agency governing body to receive the training specified under this article.

(3) A member of the governing board of a school district, a county board of education, or the governing body of a charter school, whether or not that member receives any type of

**Section 53234
Definitions**

Section 53234

Definitions

(continued)

compensation, salary, or stipend or reimbursement for actual and necessary expenses incurred in the performance of official duties.

(d) "Ethics laws" include, but are not limited to, the following:

(1) Laws relating to personal financial gain by public servants, including, but not limited to, laws prohibiting bribery and conflict-of-interest laws.

(2) Laws relating to claiming perquisites of office, including, but not limited to, gift and travel restrictions, prohibitions against the use of public resources for personal or political purposes, prohibitions against gifts of public funds, mass mailing restrictions, and prohibitions against acceptance of free or discounted transportation by transportation companies.

(3) Government transparency laws, including, but not limited to, financial interest disclosure requirements and open government laws.

(4) Laws relating to fair processes, including, but not limited to, common law bias prohibitions, due process requirements, incompatible offices, competitive bidding requirements for public contracts, and disqualification from participating in decisions affecting family members.

(a) (1) If a local agency provides any type of compensation, salary, or stipend to a member of a legislative body, or provides reimbursement for actual and necessary expenses incurred by a member of a legislative body in the performance of official duties, then all local agency officials shall receive training in ethics pursuant to this article.

(2) All local agency officials who are members of the governing board of a school district, a county board of education, or the governing body of a charter school shall receive training in ethics pursuant to this article, whether or not any member receives any type of compensation, salary, or stipend or reimbursement for actual and necessary expenses incurred in the performance of official duties.

(b) Each local agency official shall receive at least two hours of training in general ethics principles and ethics laws relevant to the official's public service every two years.

(c) If an entity develops curricula to satisfy the requirements of this section, then the Fair Political Practices Commission and the Attorney General shall be consulted regarding the sufficiency and accuracy of the proposed course content. When reviewing any proposed course content the Fair Political Practices Commission and the Attorney General shall not preclude an entity from also including local ethics policies in the curricula.

(d) A local agency or an association of local agencies may offer one or more training courses, or sets of self-study materials with tests, to meet the requirements of this section. These courses may be taken at home, in-person, or online.

(e) A provider of training courses to meet the requirements of this article shall provide participants with proof of participation to meet the requirements of Section 53235.2.

(f) A local agency shall provide information on training available to meet the requirements of this article to its local officials at least once annually.

Section 53235

Ethics training requirements

Applies to all charter school board members

Two hours every two years

Must provide information on trainings to board members annually

(a) Each local agency official in local agency service as of January 1, 2006, except for officials whose term of office ends before January 9, 2007, shall receive the training required by subdivision (a) of Section 53235 before January 1, 2007. Thereafter, each local agency official shall receive the training required by subdivision (a) of Section 53235 at least once every two years.

(b) (1) Except as provided in paragraph (2), each local agency official who commences service with a local agency on or after January 1, 2006, shall receive the training required by subdivision (a) of Section 53235 no later than one year from the first day of service with the local agency. Thereafter, each local agency official shall receive the training required by subdivision (a) of Section 53235 at least once every two years.

(2) Each local agency official who, as of January 1, 2025, is a member of the governing board of a school district, a county board of education, or the governing body of a charter school, except for officials whose term of office ends before January 1, 2026, shall receive the training required by paragraph (2) of subdivision (a) of Section 53235 before January 1, 2026. Thereafter, each local agency official who is a member of the governing board of a school district, a county board of education, or the governing body of a charter school shall receive the training required by paragraph (2) of subdivision (a) of Section 53235 at least once every two years.

(c) A local agency official who serves more than one local agency shall satisfy the requirements of this article once every two years without regard to the number of local agencies with which the official serves.

Section 53235.1 Training required

Starts for board members in service as of January 1, 2025
Initial training due by

(a) A local agency that requires its local agency officials to complete the ethical training prescribed by this article shall maintain records indicating both of the following:

(1) The dates that local officials satisfied the requirements of this article.

(2) The entity that provided the training.

(b) Notwithstanding any other provision of law, a local agency shall maintain these records for at least five years after local officials receive the training. These records are public records subject to disclosure under the California Public Records Act (Chapter 3.5 (commencing with Section 6250) of Division 7 of Title 1)

Section 53235.2 Maintain training records

PART III: REGULATIONS RELATED TO CHARTER SCHOOLS

CHARTER SCHOOL AVERAGE DAILY ATTENDANCE

California Code of Regulations, Title 5

Section 11960

Average daily attendance (ADA)

Reduction for fewer than 175 days

Age limits

(a) As used in Education Code section 47612, "attendance" means the attendance of charter school pupils while engaged in educational activities required of them by their charter schools, on days when school is actually taught in their charter schools. "Regular average daily attendance" shall be computed by dividing a charter school's total number of pupil-days of attendance by the number of calendar days on which school was actually taught in the charter school. For purposes of determining a charter school's total number of pupil-days of attendance, no pupil may generate more than one day of attendance in a calendar day.

(b) The State Superintendent of Public Instruction shall proportionately reduce the amount of funding that would otherwise have been apportioned to a charter school on the basis of average daily attendance for a fiscal year, if school was actually taught in the charter school on fewer than 175 calendar days during that fiscal year.

(c) (1) Beginning in 2004-05, a pupil who is over the age of 19 years may generate attendance for apportionment purposes in a charter school only if both of the following conditions are met:

(A) The pupil was enrolled in a public school in pursuit of a high school diploma (or, if a student in special education, an individualized education program (IEP)) while 19 years of age and, without a break in public school enrollment since that time, is enrolled in the charter school and is making satisfactory progress towards award of a high school diploma (or, if a student in special education, satisfactory progress in keeping with an IEP)

consistent with the definition of satisfactory progress set forth in subdivision (h) of section 11965.

(B) The pupil is not over the age of 22 years.

(2) This subdivision shall not apply to a charter school program specified in Education Code section 47612.1. A charter school program as specified in Education Code section 47612.1 may be either:

(A) the whole of a charter school, if the school has an exclusive partnership agreement with one or more of the programs specified in Education Code section 47612.1 and serves no other pupils; or

(B) an instructional program operated by a charter school that is exclusively dedicated to pupils who are also participating in one of the programs specified in Education Code section 47612.1, provided that arrangement is set forth in an exclusive partnership agreement between the charter school and one or more of the programs specified in Education Code section 47612.1.

(d) No individual who is ineligible to generate attendance for apportionment purposes in a charter school pursuant to subdivision (c) may be claimed as regular attendance for apportionment purposes by a local education agency that is authorized by law to grant charters. This subdivision shall not apply to claims other than claims for regular attendance for apportionment purposes.

CLOSURE PROCEDURES

California Code of Regulations, Title 5

Section 11962

Definition of procedures for school closure

As used in Education Code sections 47605(c)(5)(O) and 47605.6(b)(5)(P), "procedures" means, at a minimum, each of the following:

(a) Designation of a responsible entity to conduct closure-related activities.

(b) Notification of the closure of the charter school to parents (guardians) of pupils, the authorizing entity, the county office of education (unless the county board of education is the authorization entity), the special education local plan area in which the school participates, the retirement systems in which the school's employees participate (e.g., Public Employees' Retirement System, State Teachers' Retirement System, and federal social security), and the California Department of Education, providing at least the following:

(1) The effective date of the closure;

(2) The name(s) of and contact information for the person(s) to whom reasonable inquiries may be made regarding the closure;

(3) The pupils' school districts of residence; and

(4) The manner in which parents (guardians) may obtain copies of pupil records, including specific information on completed courses and credits that meet graduation requirements.

(c) Provision of a list of pupils in each grade level and the classes they have completed, together with information on the pupils' district of residence, to the responsible entity designated in subdivision (a).

(d) Transfer and maintenance of all pupil records, all state assessment results, and any special education records to the custody of the responsible entity designated in subdivision (a), except for records and/or assessment results that the charter may require to be transferred to a different entity.

(e) Transfer and maintenance of personnel records in accordance with applicable law.

(f) Completion of an independent final audit within six months after the closure of the school that may function as the annual audit, and that includes at least the following:

(1) An accounting of all financial assets, including cash and accounts receivable and an inventory of property, equipment, and other items of material value.

Section 11962
Definition of
procedures for school closure
(continued)

- (2) An accounting of the liabilities, including accounts payable and any reduction in apportionments as a result of audit findings or other investigations, loans, and unpaid staff compensation.
- (3) An assessment of the disposition of any restricted funds received by or due to the charter school.
- (g) Disposal of any net assets remaining after all liabilities of the charter school have been paid or otherwise addressed, including but not limited to, the following:
 - (1) The return of any grant funds and restricted categorical funds to their source in accordance with the terms of the grant or state and federal law, as appropriate, which may include submission of final expenditure reports for entitlement grants and the filing of any required Final Expenditure Reports and Final Performance Reports.
 - (2) The return of any donated materials and property in accordance with any conditions established when the donation of such materials or property was accepted.
- (h) Completion and filing of any annual reports required pursuant to Education Code section 47604.33.
- (i) Identification of funding for the activities identified in subdivisions (a) through (h).

- (a) "Notification" as used in Education Code section 47604.32(a)(5) means the transmission to the California Department of Education of at least the following:
 - (1) A description of the circumstances of the closure;
 - (2) The effective date of the closure; and
 - (3) The location of pupil records and personnel records.
- (b) "Personnel records" as used in subdivision (a) means any records the charter school has relevant to its employees, including, but not limited to, records related to performance and grievance as specified in Labor Code section 1198.5.
- (c) "Pupil records" as used in subdivision (a) has the same meaning as per Education Code section 49061(b).
- (d) "Timely" as used in Education Code section 47604.32(a)(5) means receipt of the evidence transmitted pursuant to subdivision (a) within ten calendar days of the official action taken by the chartering authority.

Section 11962.1
Definitions related to the
duties of a chartering authority

DEFINITIONS
California Code of Regulations, Title 5

For the purposes of Articles 1, 2 and 2.5, the following definitions shall apply:

- (a) "Chartering authority" means the entity that grants a school's charter and includes the following:
 - (1) "County chartering authority" means a county board of education that has granted a school's charter. In making specific the provisions of Education Code section 47607(i)(1), these regulations use the term "county chartering authority" where Education Code section 47607(i)(1) uses the term "county board of education."
 - (2) "District chartering authority" means the governing board of a school district that has granted a school's charter. In making specific the provisions of Education Code section 47607(i)(1), these regulations use the term "district chartering authority" where Education Code section 47607(i)(1) uses the term "school district."
 - (3) "State chartering authority" is the State Board of Education (SBE) when the SBE has granted a school's charter. The SBE acts as a state chartering authority when it approves the operation of a charter school that has been denied by a local educational agency (LEA) and when it approves the operation of a state charter school pursuant to Education Code section 47605.8.
- (b) "Final Decision" means the final written decision of the chartering authority to either revoke or decline to revoke a school's charter.
- (c) "Notice of Appeal" means a written document notifying the county board of education or the SBE, as appropriate, that the charter school's governing body as described in the school's charter, or the district chartering authority is appealing the decision to revoke or reverse the revocation of a school's charter.
- (d) "Notice of Intent to Revoke" means the written notice of a chartering authority's decision to pursue revocation of a school's charter due to the charter school's failure to remedy one or more violations identified in the Notice(s) of Violation. This notice shall identify all of the following:
 - (1) All evidence relied upon by the chartering authority in determining that the charter school failed to remedy a violation pursuant to this section;
 - (2) The date and time at which the chartering authority will hold a public hearing concerning revocation, which shall be held no more than 30 calendar days after the chartering authority issues this notice.
- (e) "Notice of Revocation by Determination of a Severe and Imminent Threat to Pupil Health or Safety" means the written notice of a chartering authority's decision to revoke a school's charter due to a severe and imminent threat to the health or safety of the pupils. This notice shall identify all of the following:

Section 11965
Definitions

Final Decision (revocation)

Notice of Appeal (revocation)

Notice of Intent to Revoke

Notice of Revocation
based on threat to health and safety

Section 11965

Definitions

(continued)

Notice of Violation (revocation)

- (1) The location of the facility;
- (2) The provisions of Education Code section 47607(f) that the charter school has violated and a description of the emergency or urgent conditions that have resulted from this violation;
- (3) A description of how the condition(s) identified in subdivision (2) severely and imminently threatens the health or safety of pupils.
- (4) For purposes of this article, “a severe and imminent threat to pupil health or safety” occurs when a charter school’s structures, systems or practices are in a condition that poses a severe and imminent threat to the health or safety of pupils while at school, and where the charter school has made no reasonable attempt to remedy the condition or no remedy exists to cure the condition.
- (5) For purposes of this article, “a severe and imminent threat to pupil health or safety” does not include any cosmetic or nonessential repairs or severe threats for which the school has initiated corrective action and has removed the pupils from any immediate danger.

Satisfactory progress

- (f) “Notice of Violation” means the written notice of a chartering authority’s identification of one or more specific alleged violations by the charter school based on the grounds for revocation specified in Education Code section 47607(c). This notice shall identify all of the following:
 - (1) The charter school’s alleged specific material violation of a condition, standard, or procedure set out in the school’s charter pursuant to Education Code section 47607(f)(1); the specific pupil outcome(s) identified in the school’s charter that the charter school allegedly failed to meet or pursue pursuant to Education Code section 47607(f)(2); the charter school’s alleged fiscal mismanagement or specific failure to follow generally accepted accounting principles pursuant to Education Code section 47607(f)(3); or the specific provision(s) of law that the charter school allegedly failed to follow pursuant to Education Code section 47607(f)(4), as appropriate.
 - (2) All evidence relied upon by the chartering authority in determining the charter school engaged in any of the acts or omissions identified in subdivision (f)(1) including the date and duration of the alleged violation(s), showing the violation(s) is/are both material and uncured, and that the alleged violation(s) occurred within a reasonable period of time before a notice of violation is issued; and
 - (3) The period of time that the chartering authority has concluded is a reasonable period of time for the charter school to remedy or refute the identified violation(s). In identifying the time period that will serve as the charter school’s reasonable opportunity to remedy the identified violation(s), the chartering authority shall consider the amount of time reasonably necessary to remedy each identified violation, which may include the charter school’s estimation as to the anticipated remediation time.
- (g) “Private school” as that term is used in Education Code section 47602(b) means a school that meets the requirements set forth in Education Code sections 48222 and 48223.
- (h) For each charter school, “satisfactory progress,” as that term is used in Education Code section 47612, means uninterrupted progress (1) towards completion, with passing grades, of the substance of the course of study that is required for graduation from a non-charter comprehensive high school of the school district that authorized the charter school’s charter, that the pupil has not yet completed, (2) at a rate that is at least adequate to allow the pupil to successfully complete, through full-time attendance, all of that uncompleted coursework within the aggregate amount of time assigned by the chartering agency for the study of that particular quantity of coursework within its standard academic schedule. If the chartering authority is not a school district having at least one non-charter comprehensive high school, the applicable high school graduation requirements and associated time assignments shall be those for the comprehensive high school(s) of the largest unified school district, as measured by average daily attendance, in the county or counties in which the charter school operates. For individuals with exceptional needs, as defined in Education Code section 56026, “satisfactory progress,” as that term is used in Education Code section 47612, means uninterrupted maintenance of progress towards meeting the goals and benchmarks or short-term objectives specified in his or her individualized education program made pursuant to 20 U.S.C. Section 1414(d) until high school graduation requirements have been met, or until the pupil reaches an age at which special education services are no longer required by law.
- (i) “School’s charter” is the document approved by the chartering authority, including any material revisions that have been approved by the chartering authority.
- (j) “Statewide benefit charter” is a charter school authorized by the SBE to operate at multiple sites throughout the state pursuant to Education Code section 47605.8. In making specific the provisions of Education Code section 47605.8, these regulations use the term “statewide benefit charter” where Education Code section 47605.8 uses the term “state charter school.”

CERTIFYING ATTENDANCE

California Code of Regulations, Title 5

Section 11966

Certification required for attendance reports

On each occasion that a charter school reports attendance to the California Department of Education for purposes of the calculation of state funding for the charter school, an official of the charter school who is responsible for reporting attendance shall specifically certify that all of the attendance then reported is for pupils whose attendance is eligible for public funding pursuant to Education Code section 47602(b). The Superintendent of Public Instruction shall not apportion state funds to any charter school that fails to make the certification required by this section.

RENEWALS, APPEALS & STATEWIDE BENEFIT CHARTER SCHOOLS
California Code of Regulations, Title 5

(a) A petition for renewal submitted pursuant to Education Code section 47607 shall be considered by the district governing board upon receipt of the petition with all of the requirements set forth in this subdivision:

(1) Documentation that the charter school meets at least one of the criteria specified in Education Code section 47607(b).

(2) A copy of the renewal charter petition including a reasonably comprehensive description of how the charter school has met all new charter school requirements enacted into law after the charter was originally granted or last renewed.

(A) The signature requirement set forth in Education Code section 47605(a) is not applicable to a petition for renewal.

(b) (1) When considering a petition for renewal, the district governing board shall consider the past performance of the school's academics, finances, and operation in evaluating the likelihood of future success, along with future plans for improvement if any.

(2) The district governing board may deny a petition for renewal of a charter school only if the district governing board makes written factual findings, specific to the particular petition, setting forth specific facts to support one or more of the grounds for denial set forth in Education Code section 47605(b) or facts to support a failure to meet one of the criteria set forth in Education Code section 47607(b).

(c) If within 60 days of its receipt of a petition for renewal, a district governing board has not made a written factual finding as mandated by Education Code section 47605(b), the absence of written factual findings shall be deemed an approval of the petition for renewal.

(1) The district governing board and charter petitioner may extend this date by an additional 30 days only by written mutual agreement.

(a) When the governing board of a school district denies a charter school's petition for renewal, the charter school may submit a petition for renewal to the county board of education not later than 30 calendar days after the district governing board makes its written factual findings. The county board of education and the charter petitioner may extend this date by an additional 30 days only by written mutual agreement. A petition for renewal not submitted to the county board of education within this time shall be considered denied with no further options for administrative appeal.

(b) A petition for renewal, whether submitted to the county board of education as the chartering authority or on appeal from denial of the renewal petition by the local governing board, shall be considered by the county board of education upon receipt of the petition with all of the requirements set forth in this subdivision.

(1) Documentation that the charter school meets at least one of the criteria specified in Education Code section 47607(b).

(2) A copy of the renewal charter petition, as denied by the local board, including a reasonably comprehensive description of how the charter school has met all new charter school requirements enacted into law after the charter was originally granted or last renewed.

(A) The signature requirement set forth in Education Code section 47605(a) is not applicable to a petition for renewal.

(3) When applicable, a copy of the governing board's denial and supporting written factual findings, if available.

(4) A description of any changes to the renewal petition necessary to reflect the county board of education as the chartering entity.

(c) (1) When considering a petition for renewal, the county board of education shall consider the past performance of the school's academics, finances, and operation in evaluating the likelihood of future success, along with future plans for improvement, if any.

(2) The county board of education may deny a petition for renewal of a charter school only if the county board of education makes written factual findings, specific to the particular petition, setting forth specific facts to support one or more of the grounds for denial set forth, as applicable, in Education Code sections 47605(b) and 47605.6(b), or failure to meet one of the criteria set forth in Education Code section 47607(b).

(d) If within 60 days of a county board of education's receipt of a petition for renewal the county board of education does not grant or deny the petition for the renewal of a charter school, the charter school may submit a petition for renewal to the State Board of Education (SBE). The county board of education and charter petitioner may extend this date by an additional 30 days only by written mutual agreement.

(e) If a county board of education denies a petition for renewal of a countywide charter school established under Education Code section 47605.6, the petitioner may not elect to submit the petition for renewal of the countywide charter school to the SBE.

(a) When the county board of education denies or takes no action on a charter school's petition for renewal, the charter school may submit a petition for renewal to the SBE.

(b) A petition for renewal shall include all of the following and shall be considered received when submitted to the SBE with all of the requirements set forth in this subdivision.

Section 11966.4
Submission of a charter school renewal petition to school district
Submission materials

Past performance and plans for improvement

Written factual findings for denial

Renewal by operation of law

Section 11966.5
Charter petitions that have not been renewed -- submission to county board of education
Timeline

Submission materials

Past performance and plans for improvement

Written factual findings for denial

If no action by county, appeal to SBE

Countywide charter

Section 11966.5

Charter petitions that have not been renewed -- submission to county board of education

(continued)

Submission materials

(1) Documentation that the charter school met at least one of the criteria specified in Education Code section 47607(b).

(2) A copy of the renewal charter petition, as denied, including a reasonably comprehensive description of how the charter school has met all new charter school requirements enacted into law after the charter was originally granted or last renewed.

(A) The signature requirement set forth in Education Code section 47605(a) is not applicable to a petition for renewal.

(3) A copy of district governing board's written factual findings denying the petition for renewal, and evidence of the county governing board's denial or, if the county board of education failed to act, evidence that the timeline set forth in section 11966.5(d) has expired.

(4) A description of any changes to the renewal petition necessary to reflect the SBE as the chartering entity.

Past performance

and plans for improvement

(c) (1) When considering a petition for renewal, the SBE shall consider the past performance of the school's academics, finances, and operation in evaluating the likelihood of future success, along with future plans for improvement, if any.

Written factual findings for denial

(2) The SBE may deny a petition for renewal of a charter school only if the SBE makes written factual findings, specific to the particular petition, setting forth specific facts to support one or more of the grounds for denial set forth in Education Code section 47605(b) or failure to meet one of the criteria set forth in Education Code section 47607(b).

Section 11967

Timeline for appeals of petitions for the establishment of a charter school

Submission materials

(a) A charter school petition that has been previously denied by the governing board of a school district must be received by the county board of education not later than 180 calendar days after the denial. A charter school petition that has been previously denied by a county board of education must be received by the State Board of Education (SBE) not later than 180 calendar days after the denial. Any petition received by the county board of education or SBE more than 180 days after denial shall not be acted upon by the county board of education or the SBE.

(b) When filing a petition with the county board of education or the SBE for the establishment of a charter school, petitioner(s) shall provide the following:

(1) A complete copy of the charter petition as denied, including the signatures required by Education Code section 47605.

(2) Evidence of the governing board's action to deny the petition (e.g. meeting minutes) and the governing board's written factual findings specific to the particular petition, when available, setting forth specific facts to support one or more of the grounds for denial set forth in Education Code section 47605(c).

(3) A signed certification stating that petitioner(s) will comply with all applicable law.

(4) A description of any changes to the petition necessary to reflect the county board of education or the SBE as the chartering entity, as applicable.

(c) The county board of education or SBE shall deny a petition for the establishment of a charter school only if that board makes written factual findings, specific to the particular petition, setting forth specific facts to support one or more of the grounds for denial set forth in Education Code section 47605(c)(1)-(5).

If no action by county, appeal to SBE

(d) If within 60 days of a county board of education's receipt of a petition appealing the denial to establish a charter school, the county board of education does not grant or deny the petition for the establishment of a charter school, the charter school may submit the petition for the establishment of a charter school to the SBE.

The county board of education and charter petitioner may extend this date by an additional 30 days only by written mutual agreement.

If no action by SBE,

may seek judicial review

(e) If, within 120 days of the SBE's receipt of a petition appealing the denial to establish a charter school, the SBE does not grant or deny the charter petition, the decision of the governing board of the school district to deny the petition is subject to judicial review. The SBE and the charter petitioner may extend this date by an additional 30 days only by written mutual agreement.

Review not limited to

reasons for denial

(f) In considering charter petitions that have been previously denied, the county board of education or SBE are not limited to a review based solely on the reasons for denial stated by the school district, but must review the charter school petition pursuant to Education Code section 47605(c).

Section 11967.5

SBE approval of charter school petition on appeal

The State Board of Education shall utilize the criteria set forth in Section 11967.5.1. in reviewing the elements of a charter petition submitted for its approval in accordance with the provisions of Education Code section 47605(c) and (k). The purpose of the criteria is to convey to charter petitioners the State Board of Education's understanding of the meaning of the elements specified in Education Code section 47605(c), or otherwise to convey essential information about the elements. The criteria are intended to require no charter provisions in excess of those that the State Board of Education believes necessary to determine whether each element specified in Education Code section 47605(c) has been satisfactorily addressed. Where the criteria call for judgments to be made, the judgments will be made in such a manner as to be reasonable, rational, and fair to the petitioners and other parties potentially affected by the chartering of the school by the State Board of Education.

(a) For purposes of Education Code section 47605(c), a charter petition shall be “consistent with sound educational practice” if, in the SBE’s judgment, it is likely to be of educational benefit to pupils who attend. A charter school need not be designed or intended to meet the educational needs of every student who might possibly seek to enroll in order for the charter to be granted by the SBE.

(b) For purposes of Education Code section 47605(c)(1), a charter petition shall be “an unsound educational program” if it is any of the following:

(1) A program that involves activities that the SBE determines would present the likelihood of physical, educational, or psychological harm to the affected pupils.

(2) A program that the SBE determines not to be likely to be of educational benefit to the pupils who attend.

(c) For purposes of Education Code section 47605(c)(2), the SBE shall take the following factors into consideration in determining whether charter petitioners are “demonstrably unlikely to successfully implement the program.”

(1) If the petitioners have a past history of involvement in charter schools or other education agencies (public or private), the history is one that the SBE regards as unsuccessful, e.g., the petitioners have been associated with a charter school of which the charter has been revoked or a private school that has ceased operation for reasons within the petitioners’ control.

(2) The petitioners are unfamiliar in the SBE’s judgment with the content of the petition or the requirements of law that would apply to the proposed charter school.

(3) The petitioners have presented an unrealistic financial and operational plan for the proposed charter school. An unrealistic financial and operational plan is one to which any or all of the following applies:

(A) In the area of administrative services, the charter or supporting documents do not adequately:

1. Describe the structure for providing administrative services, including, at a minimum, personnel transactions, accounting and payroll that reflects an understanding of school business practices and expertise to carry out the necessary administrative services, or a reasonable plan and time line to develop and assemble such practices and expertise.

2. For any contract services, describe criteria for the selection of a contractor or contractors that demonstrate necessary expertise and the procedure for selection of the contractor or contractors.

(B) In the area of financial administration, the charter or supporting documents do not adequately:

1. Include, at a minimum, the first-year operational budget, start-up costs, and cash flow, and financial projections for the first three years.

2. Include in the operational budget reasonable estimates of all anticipated revenues and expenditures necessary to operate the school, including, but not limited to, special education, based, when possible, on historical data from schools or school districts of similar type, size, and location.

3. Include budget notes that clearly describe assumptions on revenue estimates, including, but not limited to, the basis for average daily attendance estimates and staffing levels.

4. Present a budget that in its totality appears viable and over a period of no less than two years of operations provides for the amassing of a reserve equivalent to that required by law for a school district of similar size to the proposed charter school.

5. Demonstrate an understanding of the timing of the receipt of various revenues and their relative relationship to timing of expenditures that are within reasonable parameters, based, when possible, on historical data from schools or school districts of similar type, size, and location.

(C) In the area of insurance, the charter and supporting documents do not adequately provide for the acquisition of and budgeting for general liability, workers compensations, and other necessary insurance of the type and in the amounts required for an enterprise of similar purpose and circumstance.

(D) In the area of facilities, the charter and supporting documents do not adequately:

1. Describe the types and potential location of facilities needed to operate the size and scope of educational program proposed in the charter.

2. In the event a specific facility has not been secured, provide evidence of the type and projected cost of the facilities that may be available in the location of the proposed charter school.

3. Reflect reasonable costs for the acquisition or leasing of facilities to house the charter school, taking into account the facilities the charter school may be allocated under the provisions of Education Code section 47614.

(4) The petitioners personally lack the necessary background in the following areas critical to the charter school’s success, and the petitioners do not have a plan to secure the services of individuals who have the necessary background in these areas:

(A) Curriculum, instruction, and assessment.

(B) Finance and business management.

(d) For purposes of Education Code section 47605(c)(3), a charter petition that “does not contain the number of signatures required by subdivision (a)” of Education Code section 47605 shall be a petition that did not contain the requisite number of signatures at the time of the submission of the original charter to a school district governing board pursuant to Education Code section 47605(a). The SBE shall not disregard signatures that may be purported to have been withdrawn or to have been determined to be invalid after the petition was denied by the school district. The signature requirement set forth in Education Code section 47605(a) is not applicable to a petition for renewal.

Section 11967.5.1 SBE approval criteria

What is
“unsound educational program”?

What is
“unlikely to successfully implement”?

What are adequate signatures?

Section 11967.5.1
SBE approval criteria

(continued)

What are adequate affirmations?

(e) For purposes of Education Code section 47605(c)(4), a charter petition that “does not contain an affirmation of each of the conditions described in subdivision (e)” of Education Code section 47605 shall be a petition that fails to include a clear, unequivocal affirmation of each such condition, not a general statement of intention to comply. Neither the charter nor any of the supporting documents shall include any evidence that the charter will fail to comply with the conditions described in Education Code section 47605(e).

What is “reasonably comprehensive”?

(f) For purposes of Education Code section 47605(c)(5), the SBE shall take the following factors into consideration in determining whether a charter petition does not contain a “reasonably comprehensive” description of each of the specified elements.

(1) The description of the educational program of the school, as required by Education Code section 47605(c)(5)(A), at a minimum:

(A) Indicates the proposed charter school’s target student population, including, at a minimum, grade levels, approximate numbers of pupils, and specific educational interests, backgrounds, or challenges.

(B) Specifies a clear, concise school mission statement with which all elements and programs of the school are in alignment and which conveys the petitioners’ definition of an “educated person” in the 21st century, belief of how learning best occurs, and goals consistent with enabling pupils to become or remain self-motivated, competent, and lifelong learners.

(C) Includes a framework for instructional design that is aligned with the needs of the pupils that the charter school has identified as its target student population.

(D) Indicates the basic learning environment or environments (e.g., site-based matriculation, independent study, community-based education, or technology-based education).

(E) Indicates the instructional approach or approaches the charter school will utilize, including, but not limited to, the curriculum and teaching methods (or a process for developing the curriculum and teaching methods) that will enable the school’s pupils to master the content standards for the four core curriculum areas adopted by the SBE pursuant to Education Code section 60605 and to achieve the objectives specified in the charter.

(F) Indicates how the charter school will identify and respond to the needs of pupils who are not achieving at or above expected levels.

(G) Indicates how the charter school will meet the needs of students with disabilities, English learners, students achieving substantially above or below grade level expectations, and other special student populations.

(H) Specifies the charter school’s special education plan, including, but not limited to, the means by which the charter school will comply with the provisions of Education Code section 47641, the process to be used to identify students who qualify for special education programs and services, how the school will provide or access special education programs and services, the school’s understanding of its responsibilities under law for special education pupils, and how the school intends to meet those responsibilities.

(2) Measurable pupil outcomes, as required by Education Code section 47605(c)(5)(B), at a minimum:

(A) Specify skills, knowledge, and attitudes that reflect the school’s educational objectives and can be assessed, at a minimum, by objective means that are frequent and sufficiently detailed enough to determine whether pupils are making satisfactory progress. It is intended that the frequency of objective means of measuring pupil outcomes vary according to such factors as grade level, subject matter, the outcome of previous objective measurements, and information that may be collected from anecdotal sources. To be sufficiently detailed, objective means of measuring pupil outcomes must be capable of being used readily to evaluate the effectiveness of and to modify instruction for individual students and for groups of students.

(B) Include the school’s Academic Performance Index growth target, if applicable.

(3) The method by which pupil progress is to be measured, as required by Education Code section 47605(c)(5)(C), at a minimum:

(A) Utilizes a variety of assessment tools that are appropriate to the skills, knowledge, or attitudes being assessed, including, at a minimum, tools that employ objective means of assessment consistent with paragraph (2)(A) of subdivision (f) of this section.

(B) Includes the annual assessment results from the Statewide Testing and Reporting (STAR) program.

(C) Outlines a plan for collecting, analyzing, and reporting data on pupil achievement to school staff and to pupils’ parents and guardians, and for utilizing the data continuously to monitor and improve the charter school’s educational program.

(4) The governance structure of the school, including, but not limited to, the process to be followed by the school to ensure parental involvement in supporting the school’s effort on behalf of the school’s pupils, as required by Education Code section 47605(c)(5)(D), at a minimum:

- (A) Includes evidence of the charter school's incorporation as a non-profit public benefit corporation, if applicable.
- (B) Includes evidence that the organizational and technical designs of the governance structure reflect a seriousness of purpose necessary to ensure that:
1. The charter school will become and remain a viable enterprise.
 2. There will be active and effective representation of interested parties, including, but not limited to parents (guardians).
 3. The educational program will be successful.
- (5) The qualifications to be met by individuals to be employed by the school, as required by Education Code section 47605(c)(5)(E), at a minimum:
- (A) Identify general qualifications for the various categories of employees the school anticipates (e.g., administrative, instructional, instructional support, non-instructional support). The qualifications shall be sufficient to ensure the health, and safety of the school's faculty, staff, and pupils.
- (B) Identify those positions that the charter school regards as key in each category and specify the additional qualifications expected of individuals assigned to those positions.
- (C) Specify that the requirements for employment set forth in applicable provisions of law will be met, including, but not limited to credentials as necessary.
- (6) The procedures that the school will follow to ensure the health and safety of pupils and staff, as required by Education Code section 47605(c)(5)(F), at a minimum:
- (A) Require that each employee of the school furnish the school with a criminal record summary as described in Education Code section 44237.
- (B) Include the examination of faculty and staff for tuberculosis as described in Education Code section 49406.
- (C) Require immunization of pupils as a condition of school attendance to the same extent as would apply if the pupils attended a non-charter public school.
- (D) Provide for the screening of pupils' vision and hearing and the screening of pupils for scoliosis to the same extent as would be required if the pupils attended a non-charter public school.
- (7) Recognizing the limitations on admissions to charter schools imposed by Education Code section 47605(e), the means by which the school will achieve a racial and ethnic balance among its pupils that is reflective of the general population residing within the territorial jurisdiction of the school district to which the charter petition is submitted, as required by Education Code section 47605(c)(5)(G), shall be presumed to have been met, absent specific information to the contrary.
- (8) To the extent admission requirements are included in keeping with Education Code section 47605(c)(5)(H), the requirements shall be in compliance with the requirements of Education Code section 47605(e) and any other applicable provision of law.
- (9) The manner in which annual, independent, financial audits shall be conducted, which shall employ generally accepted accounting principles, and the manner in which audit exceptions and deficiencies shall be resolved to the satisfaction of the chartering authority, as required by Education Code section 47605(c)(5)(I), at a minimum:
- (A) Specify who is responsible for contracting and overseeing the independent audit.
- (B) Specify that the auditor will have experience in education finance.
- (C) Outline the process of providing audit reports to the SBE, California Department of Education, or other agency as the SBE may direct, and specifying the time line in which audit exceptions will typically be addressed.
- (D) Indicate the process that the charter school will follow to address any audit findings and/or resolve any audit exceptions.
- (10) The procedures by which pupils can be suspended or expelled, as required by Education Code section 47605(c)(5)(J), at a minimum:
- (A) Identify a preliminary list, subject to later revision pursuant to subparagraph (E), of the offenses for which students in the charter school must (where non-discretionary) and may (where discretionary) be suspended and, separately, the offenses for which students in the charter school must (where non-discretionary) or may (where discretionary) be expelled, providing evidence that the petitioners reviewed the offenses for which students must or may be suspended or expelled in non-charter public schools.
- (B) Identify the procedures by which pupils can be suspended or expelled.
- (C) Identify the procedures by which parents, guardians, and pupils will be informed about reasons for suspension or expulsion and of their due process rights in regard to suspension or expulsion.
- (D) Provide evidence that in preparing the lists of offenses specified in subparagraph (A) and the procedures specified in subparagraphs (B) and (C), the petitioners reviewed the lists of offenses and procedures that apply to students attending non-charter public schools, and provide evidence that the charter petitioners believe their proposed lists of offenses and procedures provide adequate safety for students, staff, and visitors to the school and serve the best interests of the school's pupils and their parents (guardians).
- (E) If not otherwise covered under subparagraphs (A), (B), (C), and (D):
1. Provide for due process for all pupils and demonstrate an understanding of the rights of pupils with disabilities in regard to suspension and expulsion.

Section 11967.5.1
SBE approval criteria
(continued)

2. Outline how detailed policies and procedures regarding suspension and expulsion will be developed and periodically reviewed, including, but not limited to, periodic review and (as necessary) modification of the lists of offenses for which students are subject to suspension or expulsion.

(11) The manner by which staff members of the charter schools will be covered by the State Teachers' Retirement System, the Public Employees' Retirement System, or federal social security, as required by Education Code section 47605(c)(5)(K), at a minimum, specifies the positions to be covered under each system and the staff who will be responsible for ensuring that appropriate arrangements for that coverage have been made.

(12) The public school attendance alternatives for pupils residing within the school district who choose not to attend charter schools, as required by Education Code section 47605(c)(5)(L), at a minimum, specify that the parent or guardian of each pupil enrolled in the charter school shall be informed that the pupil has no right to admission in a particular school of any local educational agency (LEA) (or program of any LEA) as a consequence of enrollment in the charter school, except to the extent that such a right is extended by the LEA.

(13) The description of the rights of any employees of the school district upon leaving the employment of the school district to work in a charter school, and of any rights of return to the school district after employment at a charter school, as required by Education Code section 47605(c)(5)(M), at a minimum, specifies that an employee of the charter school shall have the following rights:

(A) Any rights upon leaving the employment of an LEA to work in the charter school that the LEA may specify.

(B) Any rights of return to employment in an LEA after employment in the charter school as the LEA may specify.

(C) Any other rights upon leaving employment to work in the charter school and any rights to return to a previous employer after working in the charter school that the SBE determines to be reasonable and not in conflict with any provisions of law that apply to the charter school or to the employer from which the employee comes to the charter school or to which the employee returns from the charter school.

(14) The procedures to be followed by the charter school and the entity granting the charter to resolve disputes relating to provisions of the charter, as required by Education Code section 47605(c)(5)(N), at a minimum:

(A) Include any specific provisions relating to dispute resolution that the SBE determines necessary and appropriate in recognition of the fact that the SBE is not an LEA.

(B) Describe how the costs of the dispute resolution process, if needed, would be funded.

(C) Recognize that, because it is not an LEA, the SBE may choose to resolve a dispute directly instead of pursuing the dispute resolution process specified in the charter, provided that if the SBE intends to resolve a dispute directly instead of pursuing the dispute resolution process specified in the charter, it must first hold a public hearing to consider arguments for and against the direct resolution of the dispute instead of pursuing the dispute resolution process specified in the charter.

(D) Recognize that if the substance of a dispute is a matter that could result in the taking of appropriate action, including, but not limited to, revocation of the charter in accordance with Education Code section 47604.5, the matter will be addressed at the SBE's discretion in accordance with that provision of law and any regulations pertaining thereto.

(15) The declaration of whether or not the charter school shall be deemed the exclusive public school employer of the employees of the charter school for the purposes of the Educational Employment Relations Act. Education Code section 47605(c)(6) recognizes that the SBE is not an exclusive public school employer. Therefore, the charter school must be the exclusive public school employer of the employees of the charter school for the purposes of the Educational Employment Relations Act (commencing with Government Code section 3540).

(g) A "reasonably comprehensive" description, within the meaning subdivision (f) of this section and Education Code section 47605(c)(5) shall include, but not be limited to, information that:

(1) Is substantive and is not, for example, a listing of topics with little elaboration.

(2) For elements that have multiple aspects, addresses essentially all aspects the elements, not just selected aspects.

(3) Is specific to the charter petition being proposed, not to charter schools or charter petitions generally.

(4) Describes, as applicable among the different elements, how the charter school will:

(A) Improve pupil learning.

(B) Increase learning opportunities for its pupils, particularly pupils who have been identified as academically low achieving.

(C) Provide parents, guardians, and pupils with expanded educational opportunities.

(D) Hold itself accountable for measurable, performance-based pupil outcomes.

(E) Provide vigorous competition with other public school options available to parents, guardians, and students.

(a) A statewide benefit charter school, regardless of the number of individual schools, is treated as a school district for all purposes, including but not limited to, compliance monitoring, data reporting and collection, student performance data, oversight, and apportionments. For purposes of compliance monitoring and oversight, the SBE, in its review, will look at each individual school's independent progress in meeting federal and state growth targets.

(b) Following its submission, a petition to establish a statewide benefit charter school may be modified or new schools added that were not included in the original petition only with the approval of the SBE.

(c) Each statewide benefit charter school shall provide an annual report to the SBE reflecting student achievement data, performance benchmarks, and other pertinent data supporting stated charter goals.

(a) (1) Prior to submitting a petition for a statewide benefit charter school to the SBE, the petitioner shall submit an identical copy of the petition to the county superintendent of schools of each county where the petitioner proposes to locate a school site.

(2) The petitioner shall, with its original petition, submit a written assurance to the SBE that a copy of the petition has been provided to the appropriate county superintendent(s) of school(s).

(b) (1) Prior to submitting a petition for a statewide benefit charter school to the SBE, and no later than 120 days prior to the commencement of instruction, the petitioner shall provide a written notice to the governing board of each school district where the petitioner proposes to locate a school site.

(2) The petitioner shall, with its original petition, submit a written assurance to the SBE that written notice has been provided to the governing board of each school district where the petitioner plans to locate a school site.

(c) (1) Prior to submitting an amendment to the SBE pursuant to section 11967.6(a)(13), adding new schools to the statewide benefit charter school's list of schools, the charter school shall submit an identical copy of the proposed amendment(s) to the county superintendent of schools of each county where the petitioning charter school proposes to locate a new school site and a written notice to the governing board of each school district where the charter school proposes to locate a new school site.

(2) The charter school shall, with its amendment, submit a written assurance to the SBE that a copy of the proposed amendment(s) has been provided to the appropriate county superintendent(s) of schools and that a written notice has been provided to the governing board of each school district where the charter school proposes to locate a new school site.

(d) When the meeting date for the SBE's consideration of an original petition under subdivisions (a) and (b), or a petition to amend under subdivision (c) becomes publicly available, the petitioner shall submit a written notice of the meeting date to the county superintendent of schools of each county where the petitioner proposes to locate a school site, and to the governing board of each school district where the petitioner plans to locate a school site.

(a) The statewide benefit charter school shall notify the California Department of Education at least 60 days prior to proposed commencement of instruction at each individual school, including submission of all documentation required in section 11967.6(a)(14). Within 30 days of the receipt of a complete and documented notice pursuant to this section, the California Department of Education shall evaluate the facilities for the proposed educational program for compliance with local building permits and codes and notify the statewide benefit charter school and any affected local education agency of its determination. The charter school or any affected local education agency may appeal the Department's determination within 10 calendar days of the date of the determination, and the matter will be placed on the agenda of the next regularly scheduled meeting of the State Board of Education. If no action is taken by the State Board of Education, the California Department of Education's determination shall stand. A school may not open in a facility without a positive determination.

(b) A school in its first year of operation may only commence instruction between July 1 and September 30 of the year in which it proposes to commence operation.

(a) A statewide benefit charter school approved pursuant to Education Code section 47605.8 shall be direct-funded pursuant to Chapter 6 of Part 26.8 of the Education Code (commencing with section 47630), with the following exceptions:

(1) A statewide benefit charter school's general-purpose entitlement pursuant to Education Code section 47633 shall be funded entirely from state aid.

(2) A statewide benefit charter school does not have a "sponsoring local education agency" as defined in Education Code section 47632.

(b) The warrant for a statewide benefit charter school shall be drawn in favor of the State Superintendent of Public Instruction and a county office of education as follows:

(1) The State Board of Education may designate a county office of education as the office responsible for establishing the appropriate funds or accounts in the county treasury for the statewide benefit charter school and for making the necessary arrangements for the statewide benefit charter school's participation in the State Teachers' Retirement System and/or the Public Employees' Retirement System. The county office may charge the statewide benefit charter school

Section 11967.6
Statewide benefit charter school
Treated as school district

New schools require SBE approval

Annual report

Section 11967.6.1
Notices required for
statewide benefit charter school
petitions and amendments

Section 11967.7
Evaluation of facilities for
statewide benefit charter schools

Section 11967.8
Funding for
statewide benefit charter schools

Section 11967.8
Funding for
statewide benefit charter schools
(continued)

for the actual cost of services.

(2) In designating a county office of education, the State Board shall give preference to the county office of education of the county that the statewide benefit charter school identifies as the principal location of its business records.

(3) If the county office of education in the county that the statewide benefit charter school identifies as the principal location of its business records declines to accept the responsibility for the statewide benefit charter school, the State Board of Education may designate another county office of education by mutual agreement.

CHARTER SCHOOL AND PETITION NUMBERING
California Code of Regulations, Title 5

Section 11968
Charter school numbering

(a) If a charter school, including a statewide benefit or countrywide charter school, ceases to operate by voluntary surrender, revocation, or non-renewal of its charter, the charter school's number will lapse and will not be reassigned.

(b) On July 1, 1999, and on each succeeding July 1, the limit on the total number of charter schools authorized to operate in this state will be increased by 100.

(c) Whenever the statutory limit on the permissible number of charter schools authorized to operate in this state is reached, requests for new numbers will be placed on a list in the order received by the State Board of Education.

Section 11968.1
Numbering of
charter school petitions

(a) In accordance with subdivision (a) of section 47602 of the Education Code, the California Department of Education (CDE), on behalf of the SBE, shall establish and administer a numbering system to track the total number of charter schools authorized to operate in the state, based on the chronological order of the receipt of a complete charter petition and notification of charter approval by a local educational agency (LEA) or, in the case of a charter petition approved by the SBE, the date and time of the SBE's approval.

(b) When the SBE approves a charter petition or receives notice that a charter petition has been approved by a LEA, the SBE shall assign a number to that charter petition in accordance with section 47602(a)(1) of the Education Code.

REVOCATIONS
California Code of Regulations, Title 5

Section 11968.5.1
Revocation of, or other action
related to, a charter by the SBE

(a) Prior to making a recommendation to the SBE under Education Code sections 47604.5(a) and (b), the SSPI shall deliver a written notice to the charter school's governing body as described in the school's charter and the SBE Executive Director, which identifies one or more specific alleged violations by the charter school based on the grounds specified in Education Code sections 47604.5(a) and (b). This notice shall identify all of the following:

- (1) the charter school's alleged gross financial mismanagement that jeopardizes the financial stability of the charter school pursuant to Education Code section 47604.5(a); or the charter school's alleged illegal or substantially improper use of charter school funds for the personal benefit of any officer, director, or fiduciary of the charter school pursuant to Education Code section 47604.5(b);
- (2) all evidence relied upon by the SSPI in determining the charter school engaged in any of the acts or omissions identified in subdivision (a)(1); and
- (3) the period of time that will serve as the opportunity to remedy or refute the identified violation(s) by the charter school's governing body as described in the school's charter.

(b) Upon receipt of a written notice, the charter school's governing body as described in the school's charter, if it chooses to respond, shall take the following actions:

(1) Submit to the SSPI a detailed, written response to each identified violation which shall include the refutation or remedial action taken by the charter school's governing body as described in the school's charter, specific to each identified violation. The written response shall be due by the end of the remedy period identified in the written notice.

(2) Attach to its written response, supporting evidence of remedial action, if any, including written reports, statements, and other appropriate documentation.

(c) After conclusion of the remedy period, the SSPI shall evaluate the response of the charter school's governing body as described in the school's charter, if submitted, and shall take one of the following actions:

(1) Make a recommendation to the SBE to take appropriate action, including but not limited to, revocation of the school's charter, and provide timely written notice of such action within 30 calendar days to the charter school's governing body as described in the school's charter; or

(2) Discontinue action and provide written notice of such action to the charter school's governing body as described in the school's charter within 10 calendar days.

(d) In making a recommendation to the SBE to take appropriate action, including but not limited to, revocation of the school's charter, the SSPI shall present written findings to the SBE at the next regularly scheduled board meeting.

This section sequentially sets forth procedures the chartering authority and the charter school's governing body as described in the school's charter shall complete for the revocation of a school's charter pursuant to Education Code section 47607, except for charter revocation when the violation constitutes a severe and imminent threat to the health or safety of pupils which is subject to section 11968.5.3 rather than this section.

(a) At least 72 hours prior to any board meeting in which a chartering authority will consider issuing a Notice of Violation, the chartering authority shall provide the charter school with notice and all relevant documents related to the proposed action.

(b) The chartering authority shall deliver a Notice of Violation to the charter school's governing body as described in the school's charter.

(c) Upon receipt of a Notice of Violation, the charter school's governing body as described in the school's charter, if it chooses to respond, shall take the following actions:

(1) Submit to the chartering authority a detailed, written response addressing each identified violation which shall include the refutation, remedial action taken, or proposed remedial action by the charter school specific to each alleged violation. The written response shall be due by the end of the remedy period identified in the Notice of Violation.

(2) Attach to its written response supporting evidence of the refutation, remedial action, or proposed remedial action, if any, including written reports, statements, and other appropriate documentation.

(d) After conclusion of the reasonable opportunity to remedy, the chartering authority shall evaluate the response of the charter school's governing body as described in the school's charter response to the Notice of Violation and any supporting evidence, if submitted, and shall take one of the following actions:

(1) If the chartering authority has substantial evidence that the charter school has failed to refute to the chartering authority's satisfaction, or remedy a violation identified in the Notice of Violation, continue revocation of the school's charter by issuing a Notice of Intent to Revoke to the charter school's governing body as described in the school's charter; or

(2) Discontinue revocation of the school's charter and provide timely written notice of such action to the charter school's governing body as described in the school's charter.

(e) If the chartering authority does not act, as specified in subdivision (d), within 60 calendar days of the conclusion of the remedy period specified in the Notice of Violation, the revocation process is terminated and the Notice of Violation is void.

(f) On the date and time specified in the Notice of Intent to Revoke, the chartering authority shall hold a public hearing concerning revocation. No more than 30 calendar days after the public hearing (or 60 calendar days by written mutual agreement with the charter school) the chartering authority shall issue a Final Decision.

(g) The chartering authority shall provide a copy of the Final Decision to the CDE and its county board of education (unless the county board of education is also the chartering authority), within 10 calendar days of issuing the Final Decision.

(h) If the chartering authority does not act to issue a Final Decision within the timeframe specified in subdivision (f), the revocation process is terminated and the Notice of Intent to Revoke is void.

This section sets forth procedures the chartering authority shall complete for the revocation of a school's charter when the chartering authority has determined that any violation under Education Code section 47607(f) constitutes a severe and imminent threat to the health or safety of pupils and the procedures that a charter school and county office of education and SBE must follow if the charter school elects to appeal a chartering authority's Final Decision to revoke the school's charter.

(a) If there is a severe and imminent threat to pupil health or safety, the chartering authority is exempt from the requirements of section 11968.5.2 and may immediately revoke the school's charter by approving and delivering a Notice of Revocation by Determination of a Severe and Imminent Threat to Pupil Health or Safety to the charter school's governing body as described in the school's charter, the county board of education (unless the county board of education is also the chartering authority), and the CDE.

(b) Following the approval and delivery of the Notice of Revocation by Determination of a Severe and Imminent Threat to Pupil Health or Safety by the chartering authority, the charter school's governing body as described in the school's charter may appeal to the county board of education or the SBE, as applicable, pursuant to Education Code sections 47607(i) and (j).

(c) In an appeal to a county board of education, within 30 calendar days of receipt of a Final Decision revoking the school's charter, the charter school's governing body as described in the school's charter shall approve and deliver a written Notice of Appeal to the county board of education that:

(1) includes a copy of the Notice of Revocation by Determination of a Severe and Imminent Threat to Pupil Health or Safety issued pursuant to this article except that the charter school shall not be responsible for providing this document if the chartering authority did not provide it to the charter school as required in this section;

(2) includes evidence of the final vote of the chartering authority, if available;

(3) includes all evidence relied upon by the chartering authority in determining that a violation under section 11965(e) existed;

Section 11968.5.2 Charter revocation procedure

Notice of Violation

Notice of Intent to Revoke

Public hearing and Final Decision

Notice of Final Decision

Section 11968.5.3 Revocation procedures when there is a severe and imminent threat to the health or safety of pupils

Section 11968.5.3

Revocation procedures when there is a severe and imminent threat to the health or safety of pupils

(continued)

- (4) includes minutes of any public meeting at which the chartering authority considers or makes its decision to revoke the school's charter, if available; and
- (5) includes a written statement explaining why the charter school does not believe the district chartering authority's factual findings are supported by substantial evidence.
- (d) If the county board of education does not issue a written decision that explains whether, in the county board of education's judgment, the district chartering authority's factual findings are supported by substantial evidence within 90 calendar days of receiving a Notice of Appeal that includes the documents listed in subdivision (c) of this section, the district chartering authority's decision is upheld, pending any further appeal.
- (e) In determining whether the district chartering authority's factual findings are supported by substantial evidence, the county board of education shall consider whether the district chartering authority provided the charter school's governing body as described in the school's charter a Notice of Revocation by Determination of a Severe and Imminent Threat to Pupil Health or Safety pursuant to Education Code sections 47607(f) and (g).
- (f) The county board of education shall provide the CDE and the chartering authority a copy of its written decision within 10 calendar days of its action.
- (g) If the district chartering authority or the school's governing body as described in the school's charter elects to appeal to the SBE, the appellant shall approve and deliver a written Notice of Appeal to the SBE within 30 calendar days following the final decision by the county board of education, or within 30 calendar days upon the expiration of 90 calendar days pursuant to subdivision (d) of this section, or within 30 calendar days of a county chartering authority's Final Decision.
- (h) The appellant shall, at the same time it delivers a Notice of Appeal to the SBE, deliver to the SBE the following documents that shall be individually and sequentially numbered, one number per page, and be delivered to the respondent and the county board of education, if applicable, within five calendar days of delivery to the SBE:
 - (1) copies of the Notice of Revocation by Determination of a Severe and Imminent Threat to Pupil Health or Safety, the Final Decision, and the Notice of Appeal delivered to the county board of education, and the county board of education's written decision, as applicable;
 - (2) evidence of the final vote of the chartering authority, if available;
 - (3) evidence relied upon by the chartering authority in determining that a violation under section 11965(e) existed; and
 - (4) minutes of any public meeting at which the chartering authority considers or makes its decision to revoke the school's charter, if available.
- (i) At the same time the appellant submits its Notice of Appeal to the SBE, the appellant shall also submit to the SBE a written argument in the form of a brief or letter that shall be individually and sequentially numbered, one number per page; be delivered to the respondent within five calendar days of delivery to the SBE; and contain the following:
 - (1) a summary of the procedural and substantive facts limited to matters in the record;
 - (2) a summary of the arguments in support of the appellant's position that the chartering authority and/or the county board of education erred in its decision; and
 - (3) specific citations to the administrative record in support of each argument presented.
- (j) If the respondent chooses to submit a written opposition to the SBE, it must do so within 30 calendar days of the delivery of the appellant's written argument to the SBE. This written opposition shall be in the form of a brief or letter that shall be individually and sequentially numbered, one number per page; be delivered to the appellant within five calendar days of delivery to the SBE; and contain the following:
 - (1) a summary of the procedural and substantive facts limited to matters in the record as submitted to the chartering authority and the county board of education, as appropriate;
 - (2) a summary of the arguments in support of the respondent's position that the chartering authority and/or the county board of education did not err in its decision; and
 - (3) specific citations to the administrative record in support of each argument presented.
- (k) Within 15 calendar days of the delivery of the respondent's written opposition to the SBE, the appellant may submit to the SBE a written reply to the respondent's written opposition in the form of a brief or letter. If submitted, this written reply shall be individually and sequentially numbered, one number per page; be delivered to the respondent within five calendar days of delivery to the SBE; and contain the following:
 - (1) a summary of the arguments refuting the arguments raised in the respondent's opposition; and
 - (2) specific citations to the administrative record in support of each argument presented.
- (l) If the SBE does not take action within 120 calendar days of receipt of the appellant's written argument, if submitted pursuant to subdivision (i); or within 150 days of receipt of the respondent's written opposition, if submitted pursuant to subdivision (j); or within 165 days of receipt of the appellant's written reply, if submitted pursuant to subdivision (k); whichever is later, the appellant is deemed to have exhausted its administrative remedies.

This section establishes the procedures that a charter school and county office of education must follow if the charter school elects to appeal to a county board of education a district chartering authority's Final Decision to revoke the school's charter.

(a) Within 30 calendar days of receipt of a Final Decision revoking the school's charter, the charter school's governing body as described in the school's charter, shall approve and deliver a written Notice of Appeal to the county board of education that:

(1) Includes a copy of the Notice of Violation, Notice of Intent to Revoke and the Final Decision issued pursuant to this article except that the charter school shall not be responsible for providing these documents if the chartering authority did not provide them to the charter school as required in section 11968.5.2;

(2) Includes evidence of the final vote of the chartering authority, if available;

(3) Includes all evidence relied upon by the chartering authority in determining whether substantial evidence existed that the charter school failed to remedy one or more violations identified in the Notice(s) of Violation;

(4) Includes all evidence and correspondence submitted by the charter school's governing body as described in the school's charter in response to the chartering authority's Notice of Violation and Notice of Intent to Revoke;

(5) Includes minutes of any public meeting at which the chartering authority considers or makes its decision to revoke the school's charter, if available;

(6) Includes a written statement explaining why the charter school does not believe the district chartering authority's factual findings are supported by substantial evidence; and

(7) Identifies any procedural omissions or errors the charter school alleges to have occurred in the revocation process.

(b) If the county board of education does not issue a written decision that explains whether, in the county board of education's judgment, the district chartering authority's factual findings are supported by substantial evidence within 90 calendar days of receiving a Notice of Appeal that includes the documents listed in subdivision (a) of this section, the district chartering authority's decision is upheld, pending any further appeal.

(1) In determining whether the district chartering authority's factual findings are supported by substantial evidence, the county board of education shall consider whether the district chartering authority provided the charter school's governing body as described in the school's charter a Notice of Violation, a reasonable opportunity to remedy the identified violation(s), a Notice of Intent to Revoke, a public hearing, and Final Decision, pursuant to Articles 2 and 2.5 and Education Code sections 47607(f) through (h), inclusive.

(2) If the charter school submits a response to the Notice of Violation pursuant to section 11968.5.2(c), the county board of education shall, in determining whether the district chartering authority's factual findings are supported by substantial evidence, consider whether the charter school complied with the procedures set forth in that section.

(3) The county board of education shall also consider whether an alleged procedural deficiency negatively impacted the charter school's ability to refute or remedy the alleged violation or the chartering authority's ability to comply with its procedural obligations or authorizing duties.

(c) The county board of education shall provide the CDE and the chartering authority a copy of its written decision within 10 calendar days of its action.

(d) An appeal to a county board of education of a Notice of Revocation by Determination of a Severe and Imminent Threat to Pupil Health or Safety is subject to section 11968.5.3 rather than this section.

(a) If the district chartering authority or the charter school's governing body as described in the school's charter elects to appeal to the SBE, the appellant shall approve and deliver a written Notice of Appeal to the SBE within 30 calendar days of receiving a written decision by the county board of education, within 30 calendar days upon the expiration of 90 calendar days pursuant to section 11968.5.4(b), or within 30 calendar days of a county chartering authority's Final Decision.

(b) The appellant shall, at the same time it delivers a Notice of Appeal to the SBE, deliver to the SBE the following documents that shall be individually and sequentially numbered, one number per page, and be delivered to the respondent and the county board of education, if applicable, within five calendar days of delivery to the SBE:

(1) copies of the Notice of Violation, Notice of Intent to Revoke, the Final Decision, the Notice of Appeal to the county board of education, and the county board of education's written decision, as applicable;

(2) evidence of the final vote of the chartering authority if available;

(3) evidence relied upon by the chartering authority in determining whether substantial evidence existed that the charter school failed to refute to the chartering authority's satisfaction or remedy one or more violations identified in the Notice(s) of Violation;

(4) evidence and correspondence submitted by the charter school's governing body as described in the school's charter in response to the chartering authority's Notice of Violation and Notice of Intent to Revoke; and

(5) minutes of any public meeting at which the chartering authority considers or makes its decision to revoke the school's charter if available.

(c) At the same time the appellant submits its Notice of Appeal to the SBE, the appellant shall also submit to the SBE a written argument in the form of a brief or letter that shall be individually

Section 11968.5.4 Appeal of a district charter revocation to a county board of education

Section 11968.5.5 Appeal of charter revocation to the SBE and submission of the administrative record

Section 11968.5.5
Appeal of charter revocation to the SBE and submission of the administrative record
(continued)

- and sequentially numbered, one number per page; be delivered to the respondent within five calendar days of delivery to the SBE; and contain the following:
- (1) a summary of the procedural and substantive facts limited to matters in the record;
 - (2) a summary of the arguments in support of the appellant's position that the chartering authority and/or the county board of education erred in its decision; and
 - (3) specific citations to the administrative record in support of each argument presented.
- (d) If the respondent chooses to submit a written opposition to the SBE, it must do so within 30 calendar days of the delivery of the appellant's written argument to the SBE. This written opposition shall be in the form of a brief or letter that shall be individually and sequentially numbered, one number per page; be delivered to the appellant within five calendar days of delivery to the SBE; and contain the following:
- (1) a summary of the procedural and substantive facts limited to matters in the record as submitted to the chartering authority and the county board of education, as appropriate;
 - (2) a summary of the arguments in support of the respondent's position that the chartering authority and/or the county board of education did not err in its decision; and
 - (3) specific citations to the administrative record in support of each argument presented.
- (e) Within 15 calendar days of the delivery of the respondent's written opposition to the SBE, the appellant may submit to the SBE a written reply to the respondent's written opposition in the form of a brief or letter. If submitted, this written reply shall be individually and sequentially numbered, one number per page; be delivered to the respondent within five calendar days of delivery to the SBE; and contain the following:
- (1) a summary of the arguments refuting the arguments raised in respondent's opposition; and
 - (2) specific citations to the administrative record in support of each argument presented.
- (f) If the SBE does not take action within 120 calendar days of receipt of the appellant's written argument, if submitted pursuant to subdivision (c); or within 150 days of receipt of the respondent's written opposition, if submitted pursuant to subdivision (d); or within 165 days of receipt of the appellant's written reply, if submitted pursuant to subdivision (e); whichever is later, the appellant is deemed to have exhausted its administrative remedies.
- (g) An appeal to the SBE of a Notice of Revocation by Determination of a Severe and Imminent Threat to Pupil Health or Safety is subject to section 11968.5.3 rather than this section.

IMPLEMENTATION OF PROPOSITION 39
California Code of Regulations, Title 5

Section 11969.1
Alternative agreement permitted

- (a) This article governs provision of facilities by school districts to charter schools under Education Code section 47614.
- (b) If a charter school and a school district mutually agree to an alternative to specific compliance with any of the provisions of this article, nothing in this article shall prohibit implementation of that alternative, including, for example, funding in lieu of facilities in an amount commensurate with local rental or lease costs for facilities reasonably equivalent to facilities of the district.

Section 11969.2
Definitions
Average Daily Classroom Attendance

- (a) Average Daily Classroom Attendance. As used in Education Code section 47614(b), "average daily classroom attendance," or "classroom ADA," is average daily attendance (ADA) for classroom-based apportionments as used in Education Code section 47612.5. "In-district classroom ADA" is classroom ADA attributable to in-district students. Nothing in this article shall prohibit a school district from allowing a charter school to include nonclassroom-based ADA in average daily classroom attendance, but only:

Operating in the school district

- (1) to the extent of the instructional time that the students generating the nonclassroom-based ADA are actually in the classroom under the direct supervision and control of an employee of the charter school; and
- (2) if the school district and charter school agree upon the time(s) that facilities devoted to students generating nonclassroom-based ADA will be used.

In-district students

- (b) Operating in the School District. As used in Education Code section 47614(b), a charter school is "operating in the school district" if the charter school meets the requirements of Education Code section 47614(b)(5) regardless of whether the school district is or is proposed to be the authorizing entity for the charter school and whether the charter school has a facility inside the school district's boundaries.

Contiguous

- (c) In-district Students. As used in Education Code section 47614(b), a student attending a charter school is an "in-district student" of a school district if he or she is entitled to attend the schools of the school district and could attend a school district-operated school, except that a student eligible to attend the schools of the school district based on interdistrict attendance pursuant to Education Code section 46600-46611 or based on parental employment pursuant to Education Code section 48204(b) shall be considered a student of the school district where he or she resides.
- (d) Contiguous. As used in Education Code section 47614(b), facilities are "contiguous" if they are contained on the school site or immediately adjacent to the school site. If the in-district average daily classroom attendance of the charter school cannot be accommodated on any single school district school site, contiguous facilities also includes facilities located at more than one site,

Section 11969.2

Definitions

(continued)

provided that the school district shall minimize the number of sites assigned and shall consider student safety. In evaluating and accommodating a charter school's request for facilities pursuant to Education Code section 47614, the charter school's in-district students must be given the same consideration as students in the district-run schools, subject to the requirement that the facilities provided to the charter school must be contiguous. If a school district's preliminary proposal or final notification presented pursuant to subdivisions (f) or (h) of section 11969.9 does not accommodate a charter school at a single school site, the district's governing board must first make a finding that the charter school could not be accommodated at a single site and adopt a written statement of reasons explaining the finding.

(e) **Furnished and Equipped.** As used in Education Code section 47614(b), a facility is "furnished and equipped" if it includes reasonably equivalent furnishings necessary to conduct classroom instruction and to provide for student services that directly support classroom instruction as found in the comparison group schools established under section 11969.3(a), and if it has equipment that is reasonably equivalent to that in the comparison group schools. "Equipment" means property that does not lose its identity when removed from its location and is not changed materially or consumed immediately (e.g., within one year) by use. Equipment has relatively permanent value, and its purchase increases the total value of a Local Educational Agency's (LEA's) physical properties. Examples include furniture, vehicles, machinery, motion picture film, videotape, furnishings that are not an integral part of the building or building system, and certain intangible assets, such as major software programs. Furnishings and equipment acquired for a school site with non-district resources are excluded when determining reasonable equivalence.

Furnished and equipped

(f) **General Fund.** As used in Education Code section 47614(b)(1), "general fund" means the main operating fund of the LEA. It is used to account for all activities except those that are required to be accounted for in another fund. In keeping with the minimum number of funds principle, all of an LEA's activities are reported in the general fund unless there is a compelling reason to account for an activity in another fund. An LEA may have only one general fund.

General fund

(g) **Unrestricted Revenues.** As used in Education Code section 47614(b)(1), "unrestricted revenues" are those funds whose uses are not subject to specific constraints and that may be used for any purposes not prohibited by law. Restricted revenues are those funds received from external sources that are legally restricted or that are restricted by the donor to specific purposes. Programs funded by a combination of restricted and unrestricted sources will be accounted for and reported as restricted. Funds or activities that are not restricted or designated by the donor, but rather by the LEA's governing board, will be accounted for and reported as unrestricted.

Unrestricted revenues

(h) **Facilities Costs.** As used in Education Code section 47614(b)(1), "facilities costs" are those activities concerned with keeping the physical plant open, comfortable, and safe for use and keeping the grounds, buildings, and equipment in working condition and a satisfactory state of repair. These include the activities of maintaining safety in buildings, on the grounds, and in the vicinity of schools. This includes plant maintenance and operations, facilities acquisition and construction, and facilities rents and leases.

Facilities costs

The following provisions shall be used to determine whether facilities provided to a charter school are sufficient to accommodate charter school students in conditions reasonably equivalent to those in which the students would be accommodated if they were attending public schools of the school district providing facilities, as required by Education Code section 47614(b).

Section 11969.3

Conditions reasonably equivalent

(a) **Comparison Group.**

Comparison group

(1) The standard for determining whether facilities are sufficient to accommodate charter school students in conditions reasonably equivalent to those in which the students would be accommodated if they were attending public schools of the school district providing facilities shall be a comparison group of district-operated schools with similar grade levels. If none of the district-operated schools has grade levels similar to the charter school, then a contiguous facility within the meaning of subdivision (d) of section 11969.2 shall be an existing facility that is most consistent with the needs of students in the grade levels served at the charter school. The district is not obligated to pay for the modification of an existing school site to accommodate the charter school's grade level configuration.

(2) The comparison group shall be the school district-operated schools with similar grade levels that serve students living in the high school attendance area, as defined in Education Code section 17070.15(b), in which the largest number of students of the charter school reside. The number of charter school students residing in a high school attendance area shall be determined using in-district classroom ADA projected for the fiscal year for which facilities are requested.

(3) For school districts whose students do not attend high school based on attendance areas, the comparison group shall be three schools in the school district with similar grade levels that the largest number of students of the charter school would otherwise attend. For school districts with fewer than three schools with similar grade levels, the comparison group shall be all schools in the school district with similar grade levels.

(4) Although the district is not obligated to pay for the modification of an existing school site to accommodate the charter school's grade level configuration, nothing in this article shall preclude the district from entering into an agreement with the charter school to modify an existing school

Section 11969.3

Conditions reasonably equivalent

(continued)

Capacity

site, with the costs of the modifications being paid exclusively by the charter school or by the school district, or paid jointly by the district and the charter school.

(b) Capacity.

(1) Facilities made available by a school district to a charter school shall be provided in the same ratio of teaching stations (classrooms) to ADA as those provided to students in the school district attending comparison group schools. School district ADA shall be determined using projections for the fiscal year and grade levels for which facilities are requested. Charter school ADA shall be determined using in-district classroom ADA projected for the fiscal year and grade levels for which facilities are requested. The number of teaching stations (classrooms) shall be determined using the classroom inventory prepared pursuant to California Code of Regulations, title 2, section 1859.31, adjusted to exclude classrooms identified as interim housing. "Interim housing" means the rental or lease of classrooms used to house pupils temporarily displaced as a result of the modernization of classroom facilities, as defined in California Code of Regulations, title 2, section 1859.2, and classrooms used as emergency housing for schools vacated due to structural deficiencies or natural disasters.

(2) If the school district includes specialized classroom space, such as science laboratories, in its classroom inventory, the space allocation provided pursuant to paragraph (1) of subdivision (b) shall include a share of the specialized classroom space and/or a provision for access to reasonably equivalent specialized classroom space. The amount of specialized classroom space allocated and/or the access to specialized classroom space provided shall be determined based on three factors:

(A) the grade levels of the charter school's in-district students;

(B) the charter school's total in-district classroom ADA; and

(C) the per-student amount of specialized classroom space in the comparison group schools.

(3) The school district shall allocate and/or provide access to non-teaching station space commensurate with the in-district classroom ADA of the charter school and the per-student amount of non-teaching station space in the comparison group schools. Non-teaching station space is all of the space that is not identified as teaching station space or specialized classroom space and includes, but is not limited to, administrative space, kitchen, multi-purpose room, and play area space. If necessary to implement this paragraph, the district shall negotiate in good faith with the charter school to establish time allocations and schedules so that educational programs of the charter school and school district are least disrupted.

Condition

(c) Condition.

(1) All of the factors listed below shall be used by the school district and charter school to determine whether the condition of facilities provided to a charter school is reasonably equivalent to the condition of comparison group schools. Condition is determined by assessing such factors as age (from latest modernization), quality of materials, and state of maintenance.

(A) School site size.

(B) The condition of interior and exterior surfaces.

(C) The condition of mechanical, plumbing, electrical, and fire alarm systems, including conformity to applicable codes.

(D) The availability and condition of technology infrastructure.

(E) The condition of the facility as a safe learning environment including, but not limited to, the suitability of lighting, noise mitigation, and size for intended use.

(F) The condition of the facility's furnishings and equipment.

(G) The condition of athletic fields and/or play area space.

(2) Notwithstanding paragraph (1) of subdivision (c), at a charter school established at an existing public school site pursuant to Education Code sections 47605(a)(2), 52055.5, 52055.55, or 52055.650, the condition of the facility previously used by the school district at the site shall be considered to be reasonably equivalent to the condition of school district facilities for the first year the charter school uses the facility. During its first year of operation, the charter school shall be subject to charges for pro rata costs pursuant to section 11969.7, but shall not be subject to reimbursement for over-allocated space pursuant to section 11969.8.

(d) Additional Provisions Relating to a Charter School Established at an Existing Public School Site. The following provisions apply only to a charter school established at an existing public school site pursuant to Education Code sections 47605(a)(2), 52055.5, 52055.55, or 52055.650 and that operated at the site in its first year pursuant to paragraph (2) of subdivision (c).

(1) The school site, as identified in the school's charter, shall be made available to the school for its second year of operation and thereafter upon annual request pursuant to Education Code section 47614. The district is entitled to charge the charter school pro rata costs for the school site pursuant to section 11969.7, and the district is entitled to receive reimbursement for over-allocated space from the charter school pursuant to section 11969.8, except as provided in paragraph (3).

(2) (A) If, by material revision of the charter, the location of a charter school is changed, or if one or more additional sites are approved pursuant to Education Code section 47605(a)(4), then the school is entitled to request and the district shall provide for the use of facilities by the school in accordance with the revised charter, Education Code section 47614, and the provisions of this article .

Section 11969.3
Conditions reasonably equivalent
(continued)

(B) If the charter school was established pursuant to Education Code section 47605(a)(2), the district shall change the school's attendance area only if a waiver is first secured from the State Board of Education (SBE) pursuant to Education Code sections 33050-33053 of the requirement in Education Code section 47605(e)(1) that the school continuously give admission preference to students residing in the former attendance area of the school site.

(C) If the charter school was established pursuant to Education Code sections 52055.5, 52055.55, or 52055.650, the district shall relocate the school or change the school's attendance area only if a waiver is first secured from the SBE pursuant to Education Code sections 33050-33053 of the provision of statute binding the school to the existing school site.

(D) If a school district decides to change a charter school's attendance area as provided in subparagraphs (B) or (C), and if the decision occurs between November 1 and June 30 and becomes operative in the forthcoming fiscal year, then the space allocated to the charter school is not subject to reimbursement for over-allocated space pursuant to section 11969.8 in the forthcoming fiscal year.

(3) If, by February 1 of its first year of operation, a charter school notifies the district that it will have over-allocated space in the following fiscal year, the space identified is not subject to reimbursement for over-allocated space pursuant to section 11969.8 in the following year or thereafter, and the district is entitled to occupy all or a portion of the space identified. To recover space surrendered to the district pursuant to this paragraph, a charter school must apply to the district. An application to recover surrendered space shall be evaluated by the district in accordance with the provisions of this article.

(a) Facilities and furnishings and equipment provided to a charter school by a school district shall remain the property of the school district.

(b) The ongoing operations and maintenance of facilities and furnishings and equipment is the responsibility of the charter school. Projects eligible to be included in the school district deferred maintenance plan established pursuant to Education Code section 17582 and the replacement of furnishings and equipment supplied by the school district in accordance with school district schedules and practices, shall remain the responsibility of the school district. The charter school shall comply with school district policies regarding the operations and maintenance of the school facility and furnishings and equipment, except to the extent variation is approved by the district. However, the charter school need not comply with policies in cases where actual school district practice substantially differs from official policies.

Section 11969.4
Operations and maintenance

The space allocated for use by the charter school, subject to sharing arrangements, shall be available for the charter school's entire school year regardless of the school district's instructional year or class schedule and may not be sublet or used for purposes other than those that are consistent with school district policies and practices for use of other public schools of the school district without permission of the school district.

Section 11969.5
Availability

A school district may satisfy the requirements of Education Code section 47614 by providing facilities that are located outside the school district's boundaries, subject to other provisions of this article and subject to the restrictions on location of charter schools established in Education Code sections 47605 and 47605.1. No school district is required to provide facilities that are located outside the school district's boundaries to a charter school.

Section 11969.6
Location

If the school district charges the charter school a pro rata share of its facilities costs for the use of the facilities, the pro rata share shall not exceed (1) a per-square-foot amount equal to those school district facilities costs that the school district pays for with unrestricted revenues from the district's general fund, as defined in sections 11969.2(f) and (g) and hereinafter referred to as "unrestricted general fund revenues," divided by the total space of the school district times (2) the amount of space allocated by the school district to the charter school. The following provisions shall apply to the calculation of the pro rata share of facilities costs:

Section 11969.7
Charges for facilities costs

(a) For purposes of this section, facilities costs that the school district pays with unrestricted general fund revenues includes those costs associated with plant maintenance and operations, facilities acquisition and construction, and facilities rents and leases, as defined in section 11969.2(h). For purposes of this section, facilities costs also includes:

(1) contributions from unrestricted general fund revenues to the school district's Ongoing and Major Maintenance Account (Education Code section 17070.75), Routine Restricted Maintenance Account (Education Code section 17014), and/or deferred maintenance fund,

(2) costs paid from unrestricted general fund revenues for projects eligible for funding but not funded from the deferred maintenance fund, and

(3) costs paid from unrestricted general fund revenue for replacement of facilities-related furnishings and equipment, that have not been included in paragraphs (1) and (2), according to school district schedules and practices. For purposes of this subdivision, facilities costs do not include any costs that are paid by the charter school, including, but not limited to, costs associated with ongoing operations and maintenance and the costs of any tangible items adjusted in keeping

Section 11969.7
Charges for facilities costs

(continued)

with a customary depreciation schedule for each item.

(b) For purposes of this section, the cost of facilities shall include debt service costs.

(c) "Space allocated by the school district to the charter school" shall include a portion of shared space where a charter school shares a campus with a school district-operated program. Shared space includes, but is not limited to, those facilities needed for the overall operation of the campus, whether or not used by students. The portion of the shared space to be included in the "space allocated by the school district to the charter school" shall be calculated based on the amount of space allocated for the exclusive use of the charter school compared to the amount of space allocated to the exclusive use of the school-district-operated program.

(d) The per-square-foot charge shall be determined using actual facilities costs in the year preceding the fiscal year in which facilities are provided and the largest amount of total space of the school district at any time during the year preceding the fiscal year in which facilities are provided.

(e) The per-square-foot charge shall be applied equally by the school district to all charter schools that receive facilities under this article, and a charter school using school district facilities pursuant to Education Code section 47614 shall report the per-square-foot charge it is paying in the current fiscal year to the California Department of Education (CDE) in any notification the charter school makes to the CDE pursuant to Education Code section 47630.5(b). The CDE shall post the per-square-foot amounts reported by charter schools on its publicly accessible Web site. The CDE shall offer the opportunity to each school district to provide explanatory information regarding its per-square-foot charge and shall post any information received.

(f) If a school district charges a charter school for facilities costs pursuant to this article, and if the district is the charter school's authorizing entity, the facilities are not substantially rent free within the meaning of Education Code section 47613, and the district may only charge for the actual costs of supervisory oversight of the charter school not to exceed one percent of the school's revenue.

Section 11969.8
Reimbursement rates
for over-allocated space

(a) Space is considered to be over-allocated if (1) the charter school's actual in-district classroom ADA is less than the projected in-district classroom ADA upon which the facility allocation was based and (2) the difference is greater than or equal to a threshold ADA amount of 25 ADA or 10 percent of projected in-district classroom ADA, whichever is greater. The per-pupil rate for over-allocated space shall be equal to the statewide average cost avoided per pupil set pursuant to Education Code section 42263 for 2005-06, adjusted annually thereafter by the CDE by the annual percentage change in the general-purpose entitlement to charter schools calculated pursuant to Education Code section 47633, rounded to the next highest dollar, and posted on the CDE Web site. The reimbursement amount owed by the charter school for over-allocated space shall be equal to (1) this rate times the difference between the charter school's actual in-district classroom ADA and the projected in-district classroom ADA upon which the facility allocation was based, less (2) this rate times one-half the threshold ADA. For purposes of this subdivision, the actual in-district classroom ADA shall be determined using the report submitted pursuant to section 11969.9(f) in conjunction with the second principal apportionment under Education Code section 41601.

(b) A charter school must notify the school district when it anticipates that it will have over-allocated space that could be used by the school district. Upon notification by a charter school that the charter school anticipates having over-allocated space, a school district may elect to use the space for school district programs. The school district must notify the charter school whether or not it intends to use the over-allocated space within 30 days of the notification by the charter school. If the school district notifies the charter school that it intends to use all or a portion of the over-allocated space, payments for over-allocated space and pro rata share payments shall be reduced accordingly beginning at the time of the school district notification to use the space. If the school district notifies the charter school that it does not intend to use the space, the charter school must continue to make payments for over-allocated space and pro rata share payments. The school district may, at its sole discretion, reduce the amounts owed by the charter school.

(c) With respect to charter schools established at existing public school sites pursuant to Education Code sections 47605(a)(2), 52055.5, 52055.55, or 52055.650, the provisions of this section are limited by the applicable provisions of subdivisions (c) and (d) of section 11969.3.

Section 11969.9
Procedures and timelines for
the request for, reimbursement
for, and provision of, facilities

(a) A charter school must be operating in the school district as defined in Education Code section 47614 before it submits a request for facilities. A new or proposed new charter school is operating within the school district and, therefore, eligible to request facilities for a particular fiscal year only if it submitted its charter petition pursuant to Education Code sections 47605, 47605.5, 47605.6, or 47605.8 on or before November 1 of the fiscal year preceding the year for which facilities are requested. A new charter school is entitled to be allocated and/or provided access to facilities only if it receives approval of the petition before March 15 of the fiscal year preceding the year for which facilities are requested.

(b) To receive facilities during a particular fiscal year, a charter school must submit a written facilities request to the school district on or before November 1 of the preceding fiscal year.

November 1 charter
facilities request

Section 11969.9
Procedures and timelines for
the request for, reimbursement
for, and provision of, facilities
(continued)

(c)(1) The written facilities request consists of:

(A) reasonable projections of in-district and total ADA and in-district and total classroom ADA, based on ADA claimed for apportionment, if any, in the fiscal year prior to the fiscal year in which the facilities request is made, adjusted for expected changes in enrollment in the forthcoming fiscal year;

(B) a description of the methodology for the projections;

(C) if relevant (i.e., when a charter school is not yet open or to the extent an operating charter school projects a substantial increase in in-district ADA), documentation of the number of in-district students meaningfully interested in attending the charter school that is sufficient for the district to determine the reasonableness of the projection, but that need not be verifiable for precise arithmetical accuracy;

(D) the charter school's operational calendar;

(E) information regarding the district school site and/or general geographic area in which the charter school wishes to locate; and

(F) information on the charter school's educational program, if any, that is relevant to assignment of facilities.

(2) Projections of in-district ADA, in-district classroom ADA, and the number of in-district students shall be broken down by grade level and by the school in the school district that the student would otherwise attend.

(3) School districts may require the charter school to submit its facilities request containing the information specified in paragraphs (1) and (2) on a form available from the CDE and developed in consultation with the Advisory Commission on Charter Schools (ACCS) or another form specified by the school district. School districts may also require the charter school either to distribute a reasonable number of copies of the written facilities request for review by other interested parties, such as parents and teachers, or to otherwise make the request available for review.

(d) The school district shall review the charter school's projections of in-district and total ADA and in-district and total classroom ADA and, on or before December 1, express any objections in writing and state the projections the district considers reasonable. If the district does not express objections in writing and state its own projections by the deadline, the charter school's projections are no longer subject to challenge, and the school district shall base its offer of facilities on those projections.

December 1 district objections

(e) On or before January 2, the charter school shall respond to any objections expressed by the school district and to the district's projections provided pursuant to subdivision (d). The charter school shall reaffirm or modify its previous projections as necessary to respond to the information received from the district pursuant to subdivision (d). If the charter school does not respond by the deadline, the district's projections provided pursuant to subdivision (d) are no longer subject to challenge, and the school district shall base its offer of facilities on those projections.

January 2 charter
response to district objections

(f) On or before February 1, the school district shall prepare in writing a preliminary proposal regarding the space to be allocated to the charter school and/or to which the charter school is to be provided access. At a minimum, the preliminary proposal shall include (1) the projections of in-district classroom ADA on which the proposal is based, (2) the specific location or locations of the space, (3) all conditions pertaining to the space, including a draft of any proposed agreement pertaining to the charter school's use of the space, and (4) the projected pro rata share amount and a description of the methodology used to determine that amount. The district shall also provide the charter school a list and description of the comparison group schools used in developing its preliminary proposal, and a description of the differences between the preliminary proposal and the charter school's facilities request as submitted pursuant to subdivision (b).

February 1 preliminary proposal

(g) On or before March 1, the charter school shall respond in writing to the school district's preliminary proposal made pursuant to subdivision (f), expressing any concerns, addressing differences between the preliminary proposal and the charter school's facilities request as submitted pursuant to subdivision (b), and/or making counter proposals.

(h) On or before April 1, having reviewed any concerns and/or counter proposals made by the charter school pursuant to subdivision (g), the school district shall submit in writing a final notification of the space offered to the charter school. The notification shall include a response to the charter school's concerns and/or counter proposals (if any). The notification shall specifically identify:

April 1 district final notification

(1) the teaching station, specialized classroom space, and non-teaching station space offered for the exclusive use of the charter school and the teaching station, specialized classroom space, and non-teaching station space to which the charter is to be provided access on a shared basis with district-operated programs;

(2) for shared space, the arrangements for sharing;

(3) the in-district classroom ADA assumptions for the charter school upon which the allocation is based and, if the assumptions are different than those submitted by the charter school pursuant to subdivision (e), a written explanation of the reasons for the differences;

(4) the specific location or locations of the space;

(5) all conditions pertaining to the space;

(6) the pro rata share amount; and

Section 11969.9
Procedures and timelines for
the request for, reimbursement
for, and provision of, facilities
(continued)

Use agreements

(7) the payment schedule for the pro rata share amount, which shall take into account the timing of revenues from the state and from local property taxes.

(i) The charter school must notify the school district in writing whether or not it intends to occupy the offered space. This notification must occur by May 1 or 30 days after the school district notification pursuant to subdivision (h), whichever is later. The charter school's notification can be withdrawn or modified before this deadline. After the deadline, if the charter school has notified the school district that it intends to occupy the offered space, the charter school is committed to paying the pro rata share amount as identified. If the charter school does not notify the school district by this deadline that it intends to occupy the offered space, then the space shall remain available for school district programs and the charter school shall not be entitled to use facilities of the school district in the following fiscal year.

(j) The space allocated to the charter school by the school district (or to which the school district provides the charter school access) must be furnished, equipped and available for occupancy by the charter school for a period of at least ten working days prior to the first day of instruction of the charter school. For good cause, the period is subject to reduction by the school district, but to no fewer than seven working days.

(k) The school district and the charter school shall negotiate an agreement regarding use of and payment for the space. The agreement shall contain at a minimum, the information included in the notification provided by the school district to the charter school pursuant to subdivision (h). In addition:

(1) The charter school shall maintain general liability insurance naming the school district as an additional insured to indemnify the school district for damage and losses for which the charter school is liable. The school district shall maintain first party property insurance for the facilities allocated to the charter school.

(2) The charter school shall comply with school district policies regarding the operations and maintenance of the school facility and furnishings and equipment.

(3) A reciprocal hold-harmless/indemnification provision shall be established between the school district and the charter school.

(4) The school district shall be responsible for any modifications necessary to maintain the facility in accordance with Education Code section 47610(d) or 47610.5.

(l) The charter school must report actual ADA to the school district every time that the charter school reports ADA for apportionment purposes. The reports must include in-district and total ADA and in-district and total classroom ADA. The charter school must maintain records documenting the data contained in the reports. These records shall be available on request by the school district.

Section 11969.10
Mediation of disputes

If a dispute arises between a school district and a charter school concerning the provisions of Education Code section 47614 or this article, nothing in this article shall preclude the dispute being subject to mediation in accordance with the procedures set forth in this section, if agreeable to both parties. Mediation consists of the following:

(a) The initiating party shall select a mediator, subject to the agreement of the responding party. If, though agreeing to mediation, the parties are unable to agree upon a mediator, the CDE shall be requested by the initiating party to appoint a mediator within seven days to assist the parties in resolving the dispute. The mediator shall meet with the parties as quickly as possible.

(b) Within seven days of the selection or appointment of the mediator, the party initiating the dispute resolution process shall prepare and send to both the responding party and the mediator a notice of dispute that shall include the following information:

(1) The name, address, and phone numbers of designated representatives of the parties;

(2) A statement of the facts of the dispute, including information regarding the parties' attempts to resolve the dispute;

(3) The specific sections of the statute or regulations that are in dispute; and

(4) The specific resolution sought by the initiating party.

(c) Within seven days of receiving the information specified in subdivision (b), the responding party shall file a written response.

(d)(1) The mediation procedure shall be entirely informal in nature. However, copies of exhibits upon which either party bases its case shall be shared with the other party. The relevant facts shall be elicited in a narrative fashion to the extent possible, rather than through examination and cross-examination of witnesses. The rules of evidence will not apply and no record of the proceedings will be made.

(2) If an agreement is reached, the agreement shall be reduced to writing and shall be signed by the school district and the charter school. The agreement shall not set a precedent for any other case.

(3) If the school district and the charter school fail to meet within the specified time line, have not reached an agreement within 15 days from the first meeting held by the mediator, or if the mediator declares the parties at impasse, the mediation is terminated.

(e) The costs of the mediation shall be divided equally by the two parties and paid promptly.

**LCAP AND SPENDING REQUIREMENTS FOR SUPPLEMENTAL AND CONCENTRATION GRANTS
California Code of Regulations, Title 5**

- (a) This chapter applies to all local educational agencies (LEAs) as defined in section 15495(d).
- (b) Funding restrictions specified in Education Code section 42238.07 apply to local control funding formula (LCFF) funds apportioned on the basis of unduplicated pupils pursuant to Education Code sections 2574, 2575, 42238.02, and 42238.03.
- (c) The local control and accountability plan (LCAP) shall demonstrate how services are provided according to this chapter to meet the needs of unduplicated pupils and improve the performance of all pupils in the state priority areas.

**Section 15494
Purpose**

In addition to those found in Education Code sections 2574, 42238.01, and 42238.02, the following definitions are provided:

- (a) "Consult with pupils," as used in Education Code sections 52060, 52066, and 47606.5, means a process to enable pupils, including unduplicated pupils and other numerically significant pupil subgroups, to review and comment on the development of the LCAP. This process may include surveys of pupils, forums with pupils, pupil advisory committees, or meetings with pupil government bodies or other groups representing pupils.
- (b) "English learner parent advisory committee," as used in Education Code sections 52063 and 52069 for those school districts or schools and programs operated by county superintendents of schools whose enrollment includes at least 15 percent English learners and at least 50 pupils who are English learners, shall be composed of a majority of parents, as defined in subdivision (e), of pupils to whom the definition in Education Code section 42238.01(c) applies. A governing board of a school district or a county superintendent of schools shall not be required to establish a new English learner parent advisory committee if a previously established committee meets these requirements.
- (c) "Local control and accountability plan (LCAP)" means the plan created by an LEA pursuant to Education Code sections 47606.5, 52060, or 52066.
- (d) "Local educational agency (LEA)" means a school district, county office of education, or charter school.
- (e) "Parents" means the natural or adoptive parents, legal guardians, or other persons holding the right to make educational decisions for the pupil pursuant to Welfare and Institutions Code section 361 or 727 or Education Code sections 56028 or 56055, including foster parents who hold rights to make educational decisions.
- (f) "Parent advisory committee," as used in Education Code sections 52063 and 52069, shall be composed of a majority of parents, as defined in subdivision (e), of pupils and include parents of pupils to whom one or more of the definitions in Education Code section 42238.01 apply. A governing board of a school district or a county superintendent of schools shall not be required to establish a new parent advisory committee if a previously established committee meets these requirements, including any committee established to meet the requirements of the federal No Child Left Behind Act of 2001 (Public Law 107-110) pursuant to Section 1112 of Subpart 1 of Part A of Title I of that act.
- (g) "Prior year" means one fiscal year immediately preceding the fiscal year for which an LCAP is approved.
- (h) "Services" as used in Education Code section 42238.07 may include, but are not limited to, services associated with the delivery of instruction, administration, facilities, pupil support services, technology, and other general infrastructure necessary to operate and deliver educational instruction and related services.
- (i) "State priority areas" means the priorities identified in Education Code sections 52060 and 52066. For charter schools, "state priority areas" means the priorities identified in Education Code section 52060 that apply for the grade levels served or the nature of the program operated by the charter school.
- (j) "Subgroup" means the numerically significant pupil subgroups identified pursuant to Education Code section 52052.
- (k) "to improve services" means to grow services in quality.
- (l) "to increase services" means to grow services in quantity.
- (m) "unduplicated pupil" means any of those pupils to whom one or more of the definitions included in Education Code section 42238.01 apply, including pupils eligible for free or reduced price meals, foster youth, and English learner.

**Section 15495
Definitions**

- (a) An LEA shall provide evidence in its LCAP to demonstrate how funding apportioned on the basis of the number and concentration of unduplicated pupils, pursuant to Education Code sections 2574, 2575, 42238.02, and 42238.03 is used to support such pupils. This funding shall be used to increase or improve services for unduplicated pupils as compared to the services provided to all pupils in proportion to the increase in funds apportioned on the basis of the number and concentration of unduplicated pupils as required by Education Code section 42238.07(a)(1). An LEA shall include in its LCAP an explanation of how expenditures of such funding meet the LEA's goals for its unduplicated pupils in the state priority areas. An LEA shall determine the percentage by which services for unduplicated pupils must be increased or improved above services provided

**Section 15496
Requirement to demonstrate increased or improved services for unduplicated pupils in proportion to the increase in funds apportioned for supplemental and concentration grants**

Section 15496
Requirement to demonstrate
increased or improved services
for unduplicated pupils in
proportion to the increase in funds
apportioned for supplemental and
concentration grants
(continued)

to all pupils in the fiscal year as follows:

(1) Estimate the amount of the LCFF target attributed to the supplemental and concentration grants for the LEA calculated pursuant to Education Code sections 42238.02 and 2574 in the fiscal year for which the LCAP is adopted.

(2) Estimate the amount of LCFF funds expended by the LEA on services for unduplicated pupils in the prior year that is in addition to what was expended on services provided for all pupils. The estimated amount of funds expended in 2013-14 shall be no less than the amount of Economic Impact Aid funds the LEA expended in the 2012-13 fiscal year.

(3) Subtract subdivision (a)(2) from subdivision (a)(1).

(4) Multiply the amount in subdivision (a)(3), by the most recent percentage calculated by the Department of Finance that represents how much of the statewide funding gap between current funding and full implementation of LCFF is eliminated in the fiscal year for which the LCAP is adopted.

(5) Add subdivision (a)(4) to subdivision (a)(2).

(6) Subtract subdivision (a)(5) from the LEA's total amount of LCFF funding pursuant to Education Code sections 42238.02 and 2574, as implemented by Education Code sections 42238.03 and 2575 respectively, excluding add-ons for the Targeted Instructional Improvement Grant program and the Home to School Transportation program, in the fiscal year for which the LCAP is adopted.

(7) Divide the amount in subdivision (a)(5) by the amount in subdivision (a)(6).

(8) If the calculation in subdivision (a)(3) yields a number less than or equal to zero or when LCFF is fully implemented statewide, then an LEA shall determine its percentage for purposes of this section by dividing the amount of the LCFF target attributed to the supplemental and concentration grant for the LEA calculated pursuant to Education Code sections 42238.02 and 2574 in the fiscal year for which the LCAP is adopted by the remainder of the LEA's LCFF funding, excluding add-ons for the Targeted Instructional Improvement Grant program and the Home to School Transportation program.

(b) This subdivision identifies the conditions under which an LEA may use funds apportioned on the basis of the number and concentration of unduplicated pupils for districtwide, schoolwide, countywide, or charterwide purposes: Pursuant to Education Code section 42238.07(a)(2), an LEA may demonstrate it has increased or improved services for unduplicated pupils under subdivision (a) of this section by using funds to upgrade the entire educational program of a school site, a school district, a charter school, or a county office of education as follows:

(1) A school district that has an enrollment of unduplicated pupils of 55 percent or more of the district's total enrollment in the fiscal year for which an LCAP is adopted or in the prior year may expend supplemental and concentration grant funds on a districtwide basis. A school district expending funds on a districtwide basis shall do all of the following:

(A) Identify in the LCAP those services that are being funded and provided on a districtwide basis.
(B) Describe in the LCAP how such services are principally directed towards, and are effective in, meeting the district's goals for its unduplicated pupils in the state and any local priority areas.

(2) A school district that has an enrollment of unduplicated pupils that is less than 55 percent of the district's total enrollment in the fiscal year for which an LCAP is adopted may expend supplemental and concentration grant funds on a districtwide basis. A school district expending funds on a districtwide basis shall do all of the following:

(A) Identify in the LCAP those services that are being funded and provided on a districtwide basis.
(B) Describe in the LCAP how such services are principally directed towards, and are effective in, meeting the district's goals for its unduplicated pupils in the state and any local priority areas.
(C) Describe how these services are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description shall provide the basis for this determination, including, but not limited to, any alternatives considered and any supporting research, experience, or educational theory.

(3) A school district that has an enrollment of unduplicated pupils at a school that is 40 percent or more of the school's total enrollment in the fiscal year for which an LCAP is adopted or in the prior year may expend supplemental and concentration grant funds on a schoolwide basis. A school district expending funds on a schoolwide basis shall do all of the following:

(A) Identify in the LCAP those services that are being funded and provided on a schoolwide basis.
(B) Describe in the LCAP how such services are principally directed towards, and are effective in, meeting the district's goals for its unduplicated pupils in the state and any local priority areas.

(4) A school district that has an enrollment of unduplicated pupils that is less than 40 percent of the school site's total enrollment in the fiscal year for which an LCAP is adopted may expend supplemental and concentration grant funds on a schoolwide basis. A school district expending funds on a schoolwide basis shall do all of the following:

(A) Identify in the LCAP those services that are being funded and provided on a schoolwide basis.
(B) Describe in the LCAP how such services are principally directed towards, and are effective in, meeting the district's goals for its unduplicated pupils in the state and any local priority areas.

(C) Describe how these services are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description shall provide the basis for this determination, including, but not limited to any alternatives considered and any supporting research, experience, or educational theory.

(5) A county office of education expending supplemental and concentration grant funds on a countywide basis or a charter school expending supplemental and concentration grant funds on a charterwide basis shall do all of the following:

(A) Identify in the LCAP those services that are being funded and provided on a countywide or charterwide basis.

(B) Describe in the LCAP how such services are principally directed towards, and are effective in, meeting the county office of education's or charter school's goals for its unduplicated pupils in the state and any local priority areas, as applicable.

**CHARTER SCHOOL FACILITY GRANT PROGRAM (SB 740)
California Code of Regulations, Title 4**

This Article implements the California School Finance Authority's administration of the Charter School Facility Grant Program (Education Code section 47614.5) which provides financial assistance for charter school facilities.

For the purposes of this article, the following words and phrases shall have the meaning as described below:

(a) "Applicant" shall mean the Charter School, educational management organization, or charter management organization applying on behalf of a Charter School for a grant under this article.

(b) "Application" shall mean a completed Charter School Facility Grant Program Online Application (CSFA Form 740-01; revised July 2018), incorporated herein by reference, as developed by the Authority, and described in Section 10170.6.

(c) "Authority" shall mean the California School Finance Authority.

(d) "Average Daily Attendance" (ADA) shall mean the unit of attendance, as reported by the Department for the second period of the school year.

(e) "Average Daily Attendance Cap" (ADA Cap) shall mean for the 2017-18 Fiscal Year, an amount equal to one thousand one hundred seventeen dollars (\$1,117) per unit of ADA. Commencing with the 2018-19 Fiscal Year and moving forward, the amount of funding provided per unit of ADA in the preceding Fiscal Year, as adjusted by the Cost Of Living Adjustment Index or the amount specified in the current Budget Act.

(f) "Chartering Authority" shall mean the school district, county board of education, or State Board of Education that granted a Charter School's petition to become a Charter School pursuant to Education Code Section 47605.

(g) "Charter School" shall mean a school established and operating pursuant to the Charter Schools Act of 1992 (Education Code Section 47600, et seq.). Except where the defined term First Year Charter School is specifically used, Charter School shall also be meant to include schools that otherwise meet the definition of First Year Charter School.

(h) "Cost Of Living Adjustment Index" (COLA Index) shall mean a percentage change in the annual average value of the Implicit Price Deflator for State and Local Government Purchases of Goods and Services for the United States, as published by the United States Department of Commerce for the 12-month period ending in the third quarter of the prior Fiscal Year. This percentage change shall be determined using the latest data available as of May 10 of the preceding Fiscal Year compared with the annual average value of the same deflator for the 12-month period ending in the third quarter of the second preceding Fiscal Year, using the latest data available as of May 10 of the preceding Fiscal Year, as reported by the Department of Finance.

(i) "Department" shall mean the California Department of Education.

(j) "Estimated Annual Entitlement" shall mean the estimated grant amount to which a Charter School is entitled as calculated pursuant to Section 10170.7 prior to the first apportionment.

(k) "Facility Invoice Expenditure Report" shall mean the annual Charter School Facility Grant Program Facility Invoice Expenditure Report (CSFA Form 740-02; revised October 2017) herein incorporated by reference.

(l) "Fair Market Rent" shall mean the mean amount of money a property would rent or lease for if it was available at the time the appraisal was conducted.

(m) "Final Fiscal Year Entitlement" shall mean the final calculated grant amount to which a Grantee is entitled based on the calculation prescribed in Section 10170.8.

(n) "First Year Charter School" shall mean a school that anticipates beginning operations as a Charter School in the Fiscal Year for which it submits an Application and was not open the previous school year.

(o) "Fiscal Year" shall mean the school year for which an Application for grant funds is submitted.

(p) "Free or Reduced-Price Meal Eligibility" or "FRPM Eligibility" shall mean the percentage of enrolled students in grades Kindergarten through 12th grade or students ages 5 through 17, whichever is greater, eligible for free or reduced-price meals, as reported by the Department and certified through the annual Fall 1 data submission to the California Longitudinal Pupil Achievement Data System (CALPADS).

**Section 15496
Requirement to demonstrate
increased or improved services
for unduplicated pupils in
proportion to the increase in funds
apportioned for supplemental and
concentration grants**
(continued)

**Section 10170.1
Purpose**

**Section 10170.2
Definitions**

Section 10170.2

Definitions

(continued)

(q) "Good Standing" shall mean the Applicant satisfies all three of the following conditions: 1) compliance with the terms of its Charter Agreement, 2) no pending or outstanding Notices of Violation described in Education Code Section 47607(g), and 3) no pending or outstanding Notices of Intent to Revoke described in Education Code Section 47607(h). The Authority will rely on information prepared by the Chartering Authority and the submission of a Good Standing Confirmation Form (GSCF) (CSFA Form 1119), incorporated herein by reference.

(r) "Grantee" shall mean a Charter School determined by the Authority to be eligible for a grant.

(s) "Independent Appraisal" shall mean a value assessment of rent and lease costs for a Charter School facility completed and signed by a Certified Real Estate Appraiser or Certified General Appraiser licensed by the California Department of Real Estate Appraisers who confirms that the appraisal is in compliance with the Uniform Standards of Professional Appraisal Practice (USPAP).

(t) "New Facility Agreement" shall mean either 1) a rental or lease agreement for a facility not previously occupied by the Charter School; 2) a rental or lease agreement that includes additional square footage not included in the previous year's agreement; or 3) a new agreement for existing facilities or square footage when the existing lease is up for renewal or expires. Options to renew contained in existing rent or lease agreements on file with the Authority executed by the Charter School and the lessor will not be considered a New Facility Agreement.

(u) "Prior Year" shall mean the school year prior to the school year for which an Application is submitted.

Section 10170.3

Eligibility

Any Applicant shall be eligible to apply for a grant if all of the following conditions are met:

(a) The Application is submitted by or on behalf of a Charter School.

(b) An approved charter has been awarded, is in place, and is current at the time of Application.

(c) In the case of a First Year Charter School, a charter petition has been submitted for approval to the Chartering Authority and evidence, such as a copy of the charter petition, is submitted that the school anticipates beginning operations in the Fiscal Year for which an Application is submitted.

(d) The Charter School meets one of the following criteria:

(1) Fifty-five percent (55%) or more of the student enrollment at the Charter School site is eligible for prior year FRPM; or

(2) The Charter School site for which grant funds are requested is physically located in the attendance area of a public elementary school in which fifty-five percent (55%) or more of the pupil enrollment is eligible for prior year FRPM and the school site gives a preference in admissions to pupils who are currently enrolled in that public elementary school and to pupils who reside in the elementary school attendance area where the Charter School site is located, as determined by the local school district.

(3) First Year Charter Schools not operational in the prior year shall be eligible in the current year if the school meets the FRPM Eligibility requirements based on current year data.

(4) In all subsequent funding rounds, all schools shall adhere to Application dates outlined in Section 10170.5.

(e) The Charter School, educational management organization, or charter management organization is not in default with the requirement of all programs administered by the Authority.

(f) The Applicant is in Good Standing, as described in Section 10170.2(g), during the Fiscal Year. An Applicant found not to be in Good Standing, as determined by their Chartering Authority, shall be ineligible for grant funds. An Applicant may cure ineligibility for grant funds by meeting one of the following criteria:

(1) The Applicant receives confirmation of Good Standing within the Fiscal Year.

(2) An Applicant found not to be in Good Standing solely due to the Applicant failing to meet the requirements of Education Code Section 47607(f)(3) must provide evidence demonstrating fiscal solvency to the satisfaction of the Authority. Such evidence may include the Applicant's organizational budgets and audited financials.

(g) The Charter School shall not operate as, or be operated by, a for-profit corporation, a for-profit educational management organization, or a for-profit charter organization.

55% FRPM eligibility

Section 10170.4

Eligible costs

(a) Grant funds may be applied toward a Charter School's facilities costs for all of the following:

(1) Costs associated with facility rents or leases as evidenced by an executed rental or lease agreement and beginning with the 2017-18 funding round, shall be subject to one of the following conditions: (A) Reimbursable facility rent or lease costs do not exceed prior year's reimbursable costs on file with the Authority, subject to an adjustment of the annual COLA Index (COLA Cap); or

(B) The rent or lease costs of New Facility Agreements are at or below Fair Market Rent based on an Independent Appraisal as described in Section 10170.6(d) and paid for by the Applicant.

(i) If the Independent Appraisal finds the rent and lease costs above the Fair Market Rent, the costs will be based on Fair Market Rent as determined by the Independent Appraisal.

(2) If funds remain, costs associated with the facility but not limited to, remodeling buildings, deferred maintenance, initially installing or extending service systems and other built-in equipment, improving sites, and common area maintenance charges that are based on the Charter School's usage of the facility and are limited to maintaining and repairing the facility and its common areas will be evaluated for an award.

Section 10170.4

Eligible costs

(continued)

(3) Costs described in subdivisions (a)(1) and (a)(2) and associated with portions of school district or county office of education facilities that are not existing school district or county office of education facilities and are not reasonably equivalent facilities received from their Charter Authority.

(4) Costs associated with a ground lease as evidenced by an executed rental or lease agreement where there is no existing district facility on the ground being leased.

(b) Grant funds may not be apportioned for any of the following:

(1) Units of ADA generated through nonclassroom-based instruction as defined in Education Code Section 47612.5;

(2) Facility rent and lease costs associated with a Charter School's occupancy of existing district or county office of education facilities;

(3) Facility rent and lease costs associated with a Charter School's occupancy of reasonably equivalent facilities received from its Chartering Authority pursuant to Education Code Section 47614;

(4) Costs incurred to meet a Charter School's local match obligation for Charter School facilities that receives funds pursuant to the Charter School Facilities Program;

(5) Costs incurred for instructional or administrative costs including, but not limited to, salaries and benefits paid to teachers, instructional aides, the educational management organization or charter management organization responsible for managing the Charter School, or the Chartering Authority and existing district personnel;

(6) Lease costs assessed to the Charter School based on grant funds awarded to the school by the Authority during the same funding round;

(7) Facility rent and lease costs associated with a facility previously purchased and paid in full by the Charter School with State Charter School Facilities Incentive Grants Program funds unless those costs are associated with capital improvements;

(8) Facility rent and lease costs associated with lease-to-purchase agreements where the rent and lease costs lower the final purchase price;

(9) Facility rent and lease costs associated with a facility that is inaccessible to the Applicant. The Authority reserves the right to request evidence such as a Certificate of Occupancy or letter from the lessor that establishes the date the Applicant began to occupy the leased site; or

(10) Costs incurred during any period the Applicant is found not to be in Good Standing.

(c) Grant funds must be expended and liquidated within the guidelines of this article and the Charter School Facility Grant Program.

(d) No grant, whether for costs described in subdivision (a)(1), (a)(2), (a)(3), (a)(4), or a combination of, shall exceed the ADA Cap as defined in Section 10170.2(e) or 75% of the annual facility rent and lease costs for the Fiscal Year for which the Application is submitted, whichever is less.

(e) Where an Application is for multiple school sites, each site's eligibility and costs will be evaluated separately. The ADA applied to the determination of the grant, as described in subdivision (d), shall only be based on the eligible site(s).

(1) Where the Charter School's students migrate between eligible and ineligible school sites, the ADA applied shall be based upon the square footage ratio of eligible facilities to all facilities.

(2) Where the Charter School's students do not migrate between eligible and ineligible schools sites, the ADA applied shall be based upon the school's self-certification of the ADA for the facility the students are assigned to.

(a) Application for grant funds shall be made on an online form (CSFA Form 740-01) prescribed by the Authority, and will be available as described below. The Authority will accept Applications during the Application periods described. Applications may not be submitted by email or facsimile.

(1) The Initial Application period for each grant year shall be made available by the Authority in the month of April. Application deadlines shall be 5:00 p.m. on the date five weeks from the date the Application is made available by the Authority. The Authority shall make Application materials available on the Authority's website and notify the public of the Application release date.

(2) The Second Application period for each grant year shall be made available by the Authority on September 10 of each Fiscal Year. The Application deadline shall be 5:00 p.m. on October 15 of each Fiscal Year. The Authority shall make Application materials available on the Authority's website and notify the public of the Application release date. Under the following circumstances, an Application may be submitted during the Second Application Period;

(A) A Charter School relocates from a facility that was ineligible for a grant award to a facility that is eligible, and the Application includes a description of the change in facility circumstances; or

(B) A First Year Charter School.

(3) Late Applications and late Facility Invoice Expenditure Reports are ineligible for Program funds and are not eligible for the appeal process described in Section 10170.10.

(b) The Authority's review and evaluation of an Application for purposes of calculating the Estimated Annual Entitlement shall be based on the information contained in and submitted with the Application, and supporting information obtained directly from other state and local agencies

Grant fund restrictions

Section 10170.5

Application submission

Section 10170.5

Application submission

(continued)

Separate applications for each charter school

(c) Organizations operating more than one Charter School, as identified by separate County District School (CDS) codes, must submit a separate Application for each Charter School with a separate CDS code for which a grant award is sought. Organizations operating more than one facility location under the same CDS code must combine all facilities operating under that CDS code in one Application.

Section 10170.6

Content of application

Completed Applications and all attachments shall be submitted to the Authority via the online Application form (CSFA Form 740-01) and shall include all of the following items.

(a) Application. The Application shall include identifying information, a completed Legal Status Questionnaire, and signed certification that the data and information reported is true and correct and the charter will continue to comply with state and federal laws.

(b) Copy of current charter agreement and verification of Authorizing Board adoption and expiration date.

(c) Copy of the rent or lease agreement contract, or other documentation, verifying the Charter School's facilities rent or lease costs for the Fiscal Year for which a grant award is requested, and evidence that the rent or lease term matches or exceeds the anticipated grant term. If the Charter School does not have an executed rent or lease agreement for the Fiscal Year, the Applicant shall produce an executed lease or rental agreement for the Prior Year or other documentation sufficient to show the Charter School's actual facilities rent or lease costs for the Prior Year. If the Charter School does not have a rental or lease agreement for the Fiscal Year or Prior Year, the Applicant shall provide such other evidence to the satisfaction of the Authority, such as a pending lease agreement, that establishes the Applicant's best estimate of such costs for the Fiscal Year.

(d) After the Authority has confirmed the Applicant's eligibility and determined one or more of the Applicant's facilities is a New Facility Agreement, the Authority will use an Independent Appraisal, completed within the last three Fiscal Years, that was previously filed with the Authority during a prior Application round. Otherwise, the Authority will request an Independent Appraisal completed within the Fiscal Year. The Appraisal shall be consistent with the USPAP, and at a minimum contain the following items:

(1) Use a Certified Real Estate Appraiser or Certified General Appraiser licensed by the California Department of Real Estate Appraisers;

(2) The Appraiser shall not be a Related Party as defined in Section 10170.14(a)(3);

(3) "Client" shall be the Charter School;

(4) "Intended User" shall be the California School Finance Authority for Charter School Facility Grant Program eligibility;

(5) Provide a Fair Market Rent Analysis including an explanation that supports the conclusions reached; and

(6) Signed Certification consistent with language found in USPAP.

(e) An Applicant requesting reimbursement for Charter School costs associated with remodeling buildings, deferred maintenance, initially installing or extending service systems and other built-in equipment, improving sites and common area maintenance charges shall submit no later than July 15 following the applicable Fiscal Year all of the following:

(1) A description of the work for which the reimbursement is requested, including how it meets one of the categories of eligible work;

(2) A Facility Invoice Expenditure Report, as provided by the Authority, detailing the costs to be reimbursed; and

(3) Applicable contracts for work to be performed to the extent they exist at the time of the Application.

(f) An Applicant applying for or on behalf of a First Year Charter School shall submit an Application and the supporting documentation listed in subdivisions (f)(1)-(3), as they are made available. Grant funds will not be disbursed until items (1), (2) and (3) have been received by the Authority.

(1) An approved charter agreement evidencing the First Year Charter School's intention of operating a Charter School during the Fiscal Year for which grant funds are requested. If an approved charter agreement is not available, the Applicant shall submit the charter petition and Application and additional documentation demonstrating its intent to receive charter approval to operate a Charter School during the Fiscal Year for which grant funds are requested;

(2) An executed rental or lease agreement for the Fiscal Year for which grant funds are requested. If an executed rent or lease agreement is not available at the time of Application, the Applicant shall submit an estimate of rent or lease costs for the Fiscal Year; and

(3) A Charter School 20 Day Attendance Report shall be submitted within 20 days of initial California Department of Education Application submission date.

(g) The Authority shall be entitled to the return of all grant funds from an Applicant if it is determined that the Applicant failed to provide complete and accurate information, or provided misleading information, that resulted in the disbursement of grant funds for which an Applicant is not eligible.

(h) All requested documentation required to complete the Applicant's eligibility review or award calculation shall be due to the Authority within 60 calendar days of notification. Failure to submit this documentation by the stated deadline will result in Program ineligibility or ineligibility of

January 1, 2026
Once every two years
thereafter

Section 10170.6
Content of application
(continued)

applicable facility costs described in Section 10170.4(a)(1)-(4).

(i) The Authority will request completion of the GSCF directly from the Chartering Authority. This form shall be completed and returned only if the Chartering Authority is aware of any outstanding compliance or revocation issues; otherwise, no action is necessary. An Applicant may appeal any response by the Chartering Authority's staff directly to the Chartering Authority's governing board.

(1) Requests for completion of the GSCF will be sent out to the Chartering Authority upon receipt of each Application.

(2) The Authority reserves the right to request completion of an additional GSCF at any time during the Fiscal Year.

(a) Authority staff will make an initial determination regarding each Charter School's eligibility pursuant to Section 10170.3.

(b) For each eligible Charter School, the Authority will determine the Estimated Annual Entitlement, pursuant to Section 10170.4(d).

(c) The Estimated Annual Entitlement Calculation shall not include reimbursement of invoices as defined by Section 10170.4(a)(2).

(d) If an Applicant is unable to provide an executed rental or lease agreement for the Charter School for either the Fiscal Year or for the Prior Year, the Authority may base the Estimated Annual Entitlement on information provided by the Applicant that constitutes an estimate of the Charter School's expected facilities rent or lease costs for the Fiscal Year.

(e) For Charter Schools that submit an Application pursuant to Section 10170.5(a)(2), or Charter Schools that do not have Prior Year enrollment data, the Authority will make the Estimated Annual Entitlement calculation within 30 days of receipt of a complete Application and enrollment data from the Department.

(f) For Charter Schools that do not have Prior Year enrollment data, the Authority shall base the units on 90% of the school's enrollment as reported in the Charter School 20 day Attendance Report pursuant to Section 10170.6(f)(3).

Section 10170.7
Estimated annual
entitlement calculation

(a) By the second apportionment as described in Section 10170.9, Grantees shall provide final and actual rent or lease costs for the Fiscal Year.

(b) The Authority shall obtain from the Department final average daily attendance figures and FRPM Eligibility for each Grantee.

(c) Pursuant to Section 10170.9(d), the Authority shall consider invoices for additional facility costs as submitted pursuant to Section 10170.6(e). Reimbursement for additional eligible costs submitted by invoice shall be limited to the criteria set forth in Section 10170.4(a)(2).

(d) Based on the information provided pursuant to subdivisions (a)-(c), the Authority shall verify program eligibility and calculate each Grantee's Final Fiscal Year Entitlement, pursuant to Section 10170.4(d).

Section 10170.8
Final fiscal year
entitlement calculation

(a) The first apportionment of 50% of the Estimated Annual Entitlement shall be disbursed to each Grantee by October 31 of the Fiscal Year for which the grant is requested, or 30 days after enactment of the annual Budget Act, whichever is later.

(b) For a Grantee that submitted an Application pursuant to Section 10170.5(a)(2), the first apportionment of 50% of the Estimated Annual Entitlement shall be made within 30 days after the Authority determines eligibility and the Estimated Annual Entitlement.

(c) No later than March 1 of each Fiscal Year, the Authority shall provide to each Grantee a second disbursement of 75% of the Estimated Annual Entitlement less the initial disbursement and less any adjustments due to receipt of the executed rental or lease agreement for the designated Fiscal Year.

(d) No later than 30 days after the end of each Fiscal Year or 30 days after receiving the data and documentation needed to compute the Charter School's total annual entitlement, whichever is later, the Authority shall provide to each Grantee a third disbursement of 100% of the Final Fiscal Year Entitlement less the first two disbursements and adjusted for any changes to the FRPM Eligibility data, ADA, and executed rental or leases [sic] agreements for the designated Fiscal Year. If reimbursement of invoices considered eligible pursuant to Section 10170.4(a)(2) is requested and Program funds remain, these costs will be incorporated into this final disbursement.

(e) If there are insufficient funds to cover all eligible costs, the following conditions shall be in effect:

(1) Facility rent and lease costs as described in Section 10170.4(a)(1), (a)(3), and (a)(4) shall be awarded first. If funds remain, the Authority shall determine the pro rata share for each Grantee's invoice costs as described in Section 10170.4(a)(2) by calculating the percentage of the remaining funds available as compared to the funds needed to award all Grantees' eligible invoice costs. This percentage shall be applied to the Grantee's eligible invoice costs, as described in subsection (A) below.

(A) Eligible invoice costs = If 75% of (invoice costs + lease costs) > ADA Cap, then ADA Cap - (75% x lease costs), otherwise invoice costs.

Section 10170.9
Apportionment of grant funds

Section 10170.9

Apportionment of grant funds

(continued)

(2) If insufficient funds remain available from the Fiscal Year's appropriation to reimburse Grantee's facility rent and lease costs, the award shall be based solely on rent and lease costs as described in Section 10170.4(a)(1), (a)(3) and (a)(4). The Authority shall determine the pro rata share to which each Grantee is entitled by calculating the percentage of the Fiscal Year's appropriation as compared to the funds needed to fully award all Grantees' rent and lease costs. This percentage shall be applied to the Grantee's annual award and shall serve as the Grantee's pro rata share.

(3) The Authority shall disburse funds in three apportionments pursuant to subsections (b)-(e).

(A) The first apportionment shall be 50% of the pro rata share of the Estimated Annual Entitlement as determined by calculating the percentage of the Fiscal Year's appropriation as compared to the funds needed to fully award all Grantee's Maximum ADA Cap.

(B) The second apportionment shall be 25% of the pro rata share of the Estimated Annual Entitlement as determined by calculating the percentage of the Fiscal Year's appropriation as compared to the funds needed to fully award all Grantee's Maximum ADA Cap.

(C) The third apportionment shall be the pro rata share of the Grantee's remaining balance of the Final Fiscal Year Entitlement.

(4) Until the current year FRPM data is made available, Charter Schools with no Prior Year enrollment data shall have their FRPM based solely on the Charter School sites' Period 1 FRPM submission to the Department.

(5) During the Final Fiscal Year Entitlement Calculation, each eligible Applicant shall receive a Notice of Eligible Facility Costs (CSFA Form 740-03; revised October 2017), incorporated herein by reference. This notice shall serve as the Section 10170.10 Notification of Grantee and upon receipt, the Applicant shall have 30 days to review and execute the notice.

(6) The Applicant shall have the opportunity to appeal the Notice of Eligible Facility Costs and the Appeal Process under Section 10170.10 (b)-(g) shall be implemented.

(7) The Authority shall not disburse the third apportionment under subsection (e) until each eligible Applicant's executed Notice of Eligible Facility Costs has been received or October 30, whichever is earliest.

(f) If a Grantee's Final Fiscal Year Entitlement is less than the amount disbursed to the Grantee through the first two apportionments the Authority shall provide the Grantee with notice and require that the Grantee reimburse the Authority for the excess within 60 days of the Grantee's receipt of such notice.

(g) Prior to disbursement of funds for costs associated with remodeling buildings, deferred maintenance, initially installing or extending service systems and other built-in equipment, improving sites, and common area maintenance, the Grantee shall complete the annual Invoice Expenditure Report, provided by the Authority. Grantee shall also submit supporting invoices, work orders, or other evidence of completed work to the Authority. Upon presentation of such evidence of actual costs incurred, such costs shall be reimbursed as a portion of the final apportionment. Such evidence shall be provided to the Authority no later than July 15 of the applicable Fiscal Year.

(h) At any time during each Fiscal Year the Authority reserves the right to:

(1) Adjust each Grantee's Estimated Annual Entitlement on a pro rata basis based on the number of approved Grantees, the total amount of Estimated Annual Entitlements, and the amount of funds available;

(2) Adjust Estimated Annual Entitlements for individual Grantees based on the Authority's receipt of updated data from the Grantee or the Department; and

(3) If final data for FRPM Eligibility provided by the Department establishes that the Grantee is not eligible for the program pursuant to Section 10170.3(d), request reimbursement of grant funds already disbursed to the Grantee consistent with subdivision (d).

Section 10170.10

Notification of grantee; appeal process

(a) The Authority will provide notice to each Applicant of Authority staff's eligibility determination and award calculation pursuant to Sections 10170.7 and 10170.8.

(b) An Applicant shall have 30 calendar days from receipt of the Authority's notice to request reconsideration of eligibility or the award calculation by Authority staff.

(c) Authority staff shall have 30 calendar days to review an Applicant's request for reconsideration and provide a final staff decision.

(d) If the Applicant is unsatisfied with Authority staff's final decision, the Applicant shall have 30 calendar days following receipt of notice of the decision to notify the Authority that the Applicant wishes to appeal the matter to the Authority board.

(e) Upon receipt of an appeal notice from an Applicant, the matter will be considered by the Authority board at the next regularly scheduled Authority meeting.

(f) Applicants may request a single extension of up to 30 days for either of the deadlines provided in Section 10170.10 (b) or (d). Including the 30 day extension, the entire Appeal Process under subsections (b)-(d) may not exceed 120 days. The extension request must be approved by Authority staff and can be granted only one time during an appeal process. Staff shall consider the request for extension based on a showing of good cause and evaluate on a case-by case basis. Extensions granted under these conditions are considered final and not subject to an additional appeal process.

(g) If an appeal is not able to be resolved by the deadlines provided in Section 10170.10 (b), (d), and (f), the Authority shall deny the appeal based on a failure to comply with Program regulations. This decision is considered final and is not subject to an additional appeal.

(h) If an eligibility determination or award calculation is modified by Authority staff or the Authority Board, changes in apportionments will be processed and distributed to the Applicant within 30 days.

(a) Each Grantee shall defend, indemnify and hold harmless the Authority and the state, and all officers, trustees, agents, and employees of the same, from and against any and all claims, losses, costs, damages, or liability of any kind or nature, whether direct or indirect, arising from or relating to the grant and the project or the program.

(b) Each Grantee shall comply with any audit provisions as may be required by the Authority and/or the State Controller.

(c) Each Grantee shall maintain a valid charter and operate a charter school continuously throughout the Fiscal Year. The Authority reserves the right to routinely contact the Chartering Authority directly seeking written verification that the Grantee is in good standing and in compliance with the terms of its charter.

(d) Each Grantee shall notify the Authority, within 30 days, of any material changes to the charter school's facilities, enrollment, FRPM Eligibility, charter status, student operations, or scope of the project that occurs between the time of Application and the end of the grant period.

The Authority may, on a case-by-case basis, consider a change in the use of the grant funds if the Grantee demonstrates that the change is consistent with the program and this Article.

(a) The Authority and/or the State Controller may conduct or require periodic audits to ensure Grantees are using grant funds consistent with the requirements of the program and this article as approved. Grantees shall retain all documentation and financial data necessary to substantiate the purposes for which the grant funds were spent for a period of three years after the end of the grant period.

(b) Grantees may be required to routinely verify continued eligibility

(c) The Authority reserves the right to conduct site visits to any charter school facility or project receiving a grant pursuant to this Article.

(a) For purposes of this section, the following definitions shall apply:

(1) "Affiliate" shall mean a shareholder, partner, member, officer or board member of, or person who directly or indirectly controls, a Corporate Entity.

(2) "Corporate Entity" shall mean any type of organization or legal entity other than an individual, including a corporation, partnership, limited liability company or unincorporated association.

(3) "Related Party" shall mean:

(A) A School Official or a spouse, domestic partner, or dependent child of a School Official; or

(B) A Corporate Entity if a School Official or a spouse, domestic partner, or child of a School Official is an Affiliate of the Corporate Entity, except that a non-profit Corporate Entity formed exclusively for the purpose of managing or providing support to the Applicant or Charter School or to a group of related charter schools, and any direct or indirect wholly-owned subsidiary of any such Corporate Entity, shall not be considered a Related Party.

(C) "School Official" shall mean a board, member, officer, or employee of an Applicant or the Charter School.

(b) Grantees must avoid actual conflicts of interest when applying for or receiving grants from the Authority.

(c) Grant funds may not be used by an Applicant or Charter School to pay for any lease or rental or service agreement with a Related Party, unless all of the following conditions are satisfied:

(1) The Related Party, and, in the case of a Corporate Entity, any School Official who is an Affiliate of the Corporate Entity, abstains from voting, or participating in the discussion of the governing board of the Charter School, regarding approval of the lease, rental agreement, or any amendment thereto;

(2) The Related Party, and, in the case of a Corporate Entity, any School Official who is an Affiliate of the Corporate Entity, abstains from voting, or participating in the discussion of the governing board of the Charter School, regarding the decision to apply for a grant to cover costs associated with the lease or rental agreement, as well as abstaining from participating in the Application for grant funds or administration of the Charter School's receipt of grant funds;

(3) The Related Party, and, in the case of a Corporate Entity, any School Official who is an Affiliate of the Corporate Entity, discloses its interest in the lease or rental agreement to the governing board of the Charter School;

(4) The amount of the lease or rent is at or below Fair Market Rent based on an Independent Appraisal paid for by the Applicant or Charter School or the governing board in approving the lease or rental agreement or amendments thereto has made a finding that the agreement is

**Section 10170.10
Notification of grantee;
appeal process
(continued)**

**Section 10170.11
Obligation and
expenditure of grant funds**

**Section 10170.12
Approval of grant use change**

**Section 10170.13
Audits**

**Section 10170.14
Conflicts of interest**

Section 10170.14
Conflicts of interest
(continued)

reasonable under the circumstances; and

(5) The lease or rental agreement is not signed by the Related Party, or in the case of a Corporate Entity, by any School Official who is an Affiliate of the Corporate Entity, on behalf of the Applicant or Charter School.

(d) Nothing in this section is intended to supercede [sic] Government Code Section 1090, the Political Reform Act (commencing with Government Code Section 81000), or any other conflicts of interest laws that may be applicable to the Applicant or Charter School's participation in the program.

Section 10170.15
Funding contingency

(a) Funding for this grant program in each Fiscal Year is contingent upon the appropriation of funds.

(b) Apportionments to each Grantee will be contingent upon the Grantee's continuing eligibility to receive such apportionments.

(c) The Authority or Authority staff may seek third party verification regarding any and all applicable costs associated with the facility/project receiving a grant pursuant to this Article.

CHARTER SCHOOL REVOLVING LOAN FUND PROGRAM
California Code of Regulations, Title 4

Section 10170.16
Purpose

This Article implements the California School Finance Authority's administration of the Charter School Revolving Loan Fund Program (Education Code section 41365) which provides loans for Charter Schools.

Section 10170.17
Definitions

For the purposes of this article, the following words and phrases shall have the meaning as described below:

(a) "Affiliated Organization" shall mean a legal entity that assumes financial, legal, and operational responsibility for a Charter School(s), including but not limited to, a school district, parent company and charter management organization.

(b) "Applicant" shall mean the Charter School or Chartering Authority applying on behalf of a Charter School for a loan under this article.

(c) "Application" shall mean a completed Charter School Revolving Loan Fund Program Application (CSFA RLF-01; revised August 10, 2016), incorporated herein by reference, as defined and developed by the Authority, and all other documents required to be submitted to the Authority.

(d) "Authority" shall mean the California School Finance Authority.

(e) "CDS Code" shall mean the County-District-School identifier assigned to all California Charter Schools.

(f) "Charter School" shall mean a school established and operating pursuant to the Charter Schools Act of 1992 (Education Code Section 47600, et seq.)

(g) "Charter School Revolving Loan Fund" shall mean the designated fund within the State Treasury established pursuant to Education Code section 41365 for the purpose of disbursing Program loans to Charter Schools.

(h) "Chartering Authority" shall mean the school district, county board of education, or State Board of Education that approved a Charter School's petition to become a Charter School pursuant to Education Code section 47605.

(i) "Free or Reduced-Price Meal" or "FRPM" shall mean the percentage of enrolled students in grades Kindergarten through 12th grade or students ages 5 through 17, whichever is greater, eligible for Free or Reduced-Price Meals, as reported by the California Department of Education and certified through the annual Fall 1 data submission to the California Longitudinal Pupil Achievement Data System for the same fiscal year within which the Applicant applies.

(j) "Good Standing" shall mean the Applicant meets all three of the following conditions: 1) is in compliance with the terms of the charter, 2) does not have any pending or outstanding corrective actions as described in a notice issued pursuant to Education Code Section 47607(g), and 3) does not have a pending or outstanding Notice of Intent to Revoke as described in Education Code Section 47607(h). The Authority will rely on information prepared by the chartering authority and the submission of a Good Standing Confirmation Form (GSCF) (CSFA Form 1119), November 2019 herein incorporated by reference.

(k) "Incorporated Charter School" shall mean a Charter School operated by a corporate entity, such as a non-profit corporation, limited liability corporation, or partnership.

(l) "Loan Recipient" shall mean the Charter School or Chartering Authority that has applied on behalf of a Charter School for which the Authority has approved and issued a loan through the Program.

(m) "New Charter School" shall mean a Charter School planning to begin operations in the fiscal year following the fiscal year in which an Application has been submitted.

(n) "Nonprofit Entity" shall mean an entity organized and operated for an exempt purpose as set forth in Internal Revenue Code section 501(c)(3), or is organized and operated by a nonprofit public benefit corporation, pursuant to California Corporations Code, Title 1, Division 2, Part 2,

Section 10170.17

Definitions

(continued)

section 5110, et seq., and no part of the organization's income is distributed to its members, directors, or officers

(o) "Pooled Money Investment Account" shall mean the designated account within the State that is managed by the State Treasurer's Office and governed by the Pooled Money Investment Board to invest taxpayers' money and manage the State's cash flow. The yield on the Account is used to set the interest rate on an approved loan at the time that the loan proceeds are disbursed to Charter Schools.

(p) "Program" shall mean the Charter School Revolving Loan Fund Program.

(q) "Region One" shall consist of the following counties: Alpine, Amador, Butte, Colusa, Contra Costa, Del Norte, El Dorado, Glenn, Humboldt, Lake, Lassen, Marin, Mendocino, Modoc, Napa, Nevada, Placer, Plumas, Sacramento, San Joaquin, Shasta, Sierra, Siskiyou, Solano, Sonoma, Sutter, Tehama, Trinity, Yolo, and Yuba.

(r) "Region Two" shall consist of the following counties: Alameda, Calaveras, Fresno, Inyo, Kern, Kings, Madera, Mariposa, Merced, Mono, Monterey, San Benito, San Francisco, San Mateo, Santa Clara, Santa Cruz, Stanislaus, Tulare, and Tuolumne.

(s) "Region Three" shall consist of the following counties: Los Angeles, San Bernardino, San Luis Obispo, Santa Barbara, and Ventura.

(t) "Region Four" shall consist of the following counties: Imperial, Orange, Riverside, and San Diego. An Applicant shall be eligible to apply for a loan if the following conditions are met:

(a) The Application is submitted by a Charter School or by a Chartering Authority.

(b) The Charter School shall not operate as, or be operated by, a for-profit corporation, a for-profit educational management organization, or a for-profit charter organization.

(c) The Charter School is established pursuant to Education Code section 47600 et seq.

(d) An approved charter has been awarded, is in place, and is current at the time of Application. In the case of a first year Charter School, the Applicant shall submit evidence that its charter petition has been submitted to a Chartering Authority for approval and that it anticipates beginning operations in the following fiscal year.

(e) If the Applicant is a Charter School applying on its own behalf, the Charter School shall be an Incorporated Charter School as demonstrated by Articles of Incorporation.

(f) The Charter School is not a conversion from an existing public school.

(g) The Charter School has not had its charter renewed as of the date of submission of its Application.

(h) The Charter School has no material legal issues.

(i) A Charter School may receive multiple loans. In no instance may a Charter School receive more than \$250,000 in Program loans over the lifetime of the Charter School.

(j) The Charter School and/or Affiliated Organization, if applicable, are in compliance with all programs administered by the Authority.

(k) The Charter School is in Good Standing as described in Section 10170.17(j) during the fiscal year. An Applicant found not to be in Good Standing, as determined by their Chartering Authority, shall be ineligible for program funds. The Applicant may cure ineligibility for program funds by meeting one of the following criteria:

(1) The Applicant receives confirmation of Good Standing within the same fiscal year of application; or

(2) Applicants found not to be in Good Standing solely due to the Applicant failing to meet the requirements of Education Code Section 47607(f)(3) must provide evidence demonstrating fiscal solvency to the satisfaction of the Authority. Such evidence may include the Applicant's organizational budgets and audited financials.

(l) The Authority shall determine whether the Application is complete. If the Authority determines that additional information is needed, the Authority shall notify the Applicant and request such information. If the Applicant fails to provide the information as requested, the Applicant shall be ineligible for a Program loan.

(a) The Application (CSFA RLF-01; revised August 10, 2016) will be made available on the Authority's website, based on available funding.

(b) Based on availability of funding, Applications will be accepted on an ongoing first come first-served basis, with priority given based on date of submission and criteria set forth at Section 10170.20. Applicants shall submit an Application and all supporting documents via the online Application system.

(c) Each completed Application shall include the following documents (in addition to supporting documents required for the Application, CSFA RLF-01; revised August 10, 2016):

(1) Articles of Incorporation for an incorporated charter or operational agreement or Memorandum of Understanding between the Charter School and the Chartering Authority for a dependent charter;

(2) Nonprofit Entity verification as described in Section 10170.17(n);

(3) Description of the intended use of an award of loan funds;

(4) Copy of current charter petition and evidence supporting charter approval and term;

Section 10170.18

Eligibility

Section 10170.19

Application content and submission

Section 10170.19
Application content and submission
(continued)

- (5) Audited financial statements, if available;
 - (6) An adopted budget, if available, for the first fiscal year for which the Applicant is applying;
 - (7) Multi-year budget projections for at least the five fiscal years beyond the first fiscal year for which the Applicant is applying, including written budget assumptions;
 - (8) Most recent business plan and/or strategic plan for at least the next five academic years;
 - (9) List of the Charter School's board of directors including their occupations, cities of residence, and terms of office;
 - (10) Resumes of key staff members (e.g., Chief Executive Officer, President, Operations Manager, Chief Financial Officer, Principal, etc.) of the Charter School;
 - (11) Historical, current, and projected enrollment and attendance, by grade level, for the next five years;
 - (12) Targeted student population and demographics;
 - (13) A listing of historical, current, and anticipated future funding through private contributions;
 - (14) List the total amounts, annual amounts, interest rates, and maturity dates of all existing and anticipated short- and long-term debt obligations of the Applicant or Charter School; and
 - (15) List and copy of all material contracts, including, but not limited to, management, support services, transportation contracts, and any such anticipated contracts involving use of space or equipment.
- (d) The Authority will request completion of the GSCF directly from the Chartering Authority. This form shall be completed and returned only if the Chartering Authority is aware of any outstanding compliance or revocation issues, otherwise no action is necessary. An Applicant may appeal any response by the Chartering Authority's staff directly to the Chartering Authority's governing board.
- (1) Requests for confirmation of Good Standing will be sent out to the Chartering Authority upon receipt of each Application.
 - (2) The Authority reserves the right to request an additional Good Standing Confirmation at any time during the life of the loan.
 - (e) An Affiliated Organization operating more than one Charter School, as identified by separate CDS Codes, must submit a separate Application for each Charter School with a separate CDS Code for which a loan award is sought.

Section 10170.20
Application review and evaluation/underwriting criteria

- (a) The Authority will evaluate and determine Program loans based on the following
 - (1) The Applicant meets all Eligibility Criteria under Section 10170.18;
 - (2) The Applicants demonstrates the ability to repay the loan; and
 - (3) The Applicant demonstrates that use of loan funds will be strictly for supporting the operations and financing of the Charter School consistent with the intent of the charter pursuant to Education Code Section 47605.
- (b) In addition, the Authority may consider the following criteria as it relates to the Application:
 - (1) Soundness of the Charter School's business plan, and the expertise of key management at the Charter School;
 - (2) Availability to the Charter School of other sources of funds;
 - (3) Impact of receipt of Program funds received on the Charter School's receipt of other private and public financing;
 - (4) Compliance with other Programs under the Authority, if the Charter School or its affiliate received an award under another Program;
 - (5) Compliance with repayment of all prior Program loan(s), if the Charter School or its affiliate received all previous Program loan(s); and
 - (6) In the Authority's evaluation of supporting financial information submitted pursuant to Section 10170.19(d), the Authority shall consider the reasonableness of projected financial performance and corresponding assumptions based on current and historical performance and Charter School's business and/or strategic plans. The Authority may consider current and historical performance, including cash flow, major revenues, degree of reliance on loans and fundraising, enrollment trends, student performance data, projected average daily attendance, expenses, and debt service coverage, if applicable.
- (c) Priority shall be given to New Charter Schools for start-up costs. If additional funds are available after New Charter Schools have been deemed eligible, consideration for a Program loan will be given to existing Charter Schools that have not had their charter's renewed.
- (d) If there are insufficient funds available during an Application cycle, the Authority shall establish priority as follows:
 - (1) Among New Charter Schools, if applicable, based on highest FRPM across Regions ensuring equal representation to the extent feasible among Regions pursuant to Section 10170.17(q)-(t);
 - (2) Among existing Charter Schools based on highest FRPM across Regions ensuring equal representation to the extent feasible among Regions pursuant to Section 10170.17(q)-(t).
- (e) Pursuant to subdivision (d), in the event that the Charter School's FRPM data is not available, the Authority shall award loans based on the FRPM of the school's projected elementary school attendance area.

Priority for new charter schools

Priority for existing charter schools

- (a) The Authority shall establish a loan amount and repayment period, for an approved loan, which shall be memorialized in a written Loan Agreement and subject to an interest rate equal to the interest rate earned in the Pooled Money Investment Account as of the date of loan disbursement.
- (b) The Authority shall consider the term of the charter as well as the amount of the loan in establishing the repayment period.
- (1) In the case of a New Charter School, the loan term will not exceed the length of the school's approved charter term.
- (c) The loan repayment shall begin in the first fiscal year following the date of disbursement as determined by the Authority's accounting office, and all disbursements shall be in a single fiscal year. In the case of charter schools receiving multiple disbursements, the first fiscal year of repayment shall be based on the date of final disbursement.
- (d) The repayment amount for each fiscal year following the issuance of the loan shall be based on equal annual payments, including principal and interest, over the number of years determined by the Authority
- (e) In no event shall the repayment period on a Program loan exceed five years.

**Section 10170.21
Loan amount and repayment terms**

- (a) Prior to the issuance of each loan award, the Authority shall require each Loan Recipient to agree to terms and conditions set forth in a written Loan Agreement, which shall specify the loan amount, repayment period, covenants, and requirements in the event of inability to make payments or default.
- (b) The Loan Agreement requires each Loan Recipient to have a valid CDS Code.
- (c) The Loan Agreement shall require each Loan Recipient to agree to each of the following:
- (1) Having its loan payments intercepted and offset at the state level, pursuant to Sections 41365(f) of the Education Code;
- (2) Defending, indemnifying and holding harmless the Authority and the State, and all officers, trustees, agents, and employees of the same, from and against any and all claims, losses, costs, damages, or liability of any kind or nature, whether direct or indirect, arising from or relating to the Program;
- (3) Complying with any audit provisions as may be required by the Authority, State Controller, or the California State Auditor;
- (4) Maintaining a valid charter and operating a Charter School continuously throughout the term of the loan. The Authority reserves the right to contact the Chartering Authority directly seeking written verification that the Loan Recipient is in Good Standing and in compliance with the terms of its charter;
- (5) Notifying the Authority, within 30 days, of any material changes to its financial condition or that of the Charter School that occur between the time of Application and the end of the loan period;
- (6) Ensuring that the expenditure of all loan funds is consistent with the intent of the Program and solely for the purpose of supporting the operations and financing of the Charter School;
- (7) Notifying the Authority within 30 days of a Loan Recipient's determination that all or a portion of loan funds are no longer needed for their intended use, as identified in the Application, and providing remittance to the Authority of all such funds that have already been disbursed; and
- (8) Such other terms and conditions as agreed upon by the Authority and the Charter School.
- (d) The Loan Agreement shall include a loan repayment schedule.
- (e) In the case of insufficient funds to make the annual payment during a fiscal year, any available funds will be offset as scheduled and any deficit / amount owed will be added to the next scheduled apportionment offset in the same fiscal year.
- (1) If the total of insufficient funds is not offset by the end of the fiscal year, then the deficit / amount owed will be invoiced to the Charter School and will be repaid within 60 days.
- (2) If a Charter School closes or fails to open within the next fiscal year after receiving their loan disbursement, the Charter School will be invoiced for the full loan amount and must be repaid within 60 days, unless granted an extension.
- (f) The Authority shall set up accounts receivable for any Charter School that is past due on loan repayment or that has defaulted on repayment of a Loan.
- (g) In the event the Charter School is unable to repay the loan and the Charter School is operated by an Affiliated Organization or Chartering Authority in the case of a dependent charter, the Authority shall require the Affiliated Organization or Chartering Authority to make annual payments or repay the total outstanding loan amount on behalf of the Charter School.
- (h) In the event the Charter School is unable to repay the loan and the Charter School is operated by an Affiliated Organization or Chartering Authority in the case of a dependent charter, and the corresponding Affiliated Organization or Charter Authority is an awardee under one of the Authority's other programs, the Authority may offset unrestricted funds from the relevant program in order to ensure repayment of the loan.

**Section 10170.22
Loan agreements**

- (a) The State may conduct or require periodic audits to ensure Loan Recipients are using funds consistent with the requirements and the terms of the Program, the related financing program, if applicable, and this Article as approved. Loan Recipients shall retain all documentation and financial data necessary to substantiate the purposes for which the financing funds were spent for a period of five years after repayment of the loan.
- (b) Loan Recipients may be required to routinely verify continued eligibility.

**Section 10170.23
Internal controls, audits
and conflicts of interest**

Section 10170.23
Internal controls, audits
and conflicts of interest
(continued)

(c) The Authority reserves the right to conduct site visits to any Charter School facility or project applying for or receiving a loan pursuant to this Article.

Section 10170.24
Funding contingency

(a) Funding for this Program is contingent upon the availability of funds in the Charter School Revolving Loan Fund.

CHARTER SCHOOL FACILITIES INCENTIVE GRANTS PROGRAMS
California Code of Regulations, Title 4

Section 10175
Purpose

This Article implements the California School Finance Authority's administration of the grant(s) received under the U. S. Department of Education, State Charter School Facilities Incentive Grants Program (CFDA #84.282D) which provides per-pupil facilities aid for California charter school pupils.

Section 10176
Definitions

The following words and phrases shall have the meaning as described below:

(a) "Applicant" shall mean the charter school or educational management organization applying on behalf of a charter school for a grant under this article.

(b) "Application" shall mean a completed State Charter School Facilities Incentive Grants Program (CFDA #84.282D) online application (Form CSFA 05-01, rev. 3/2016), incorporated herein by reference, as defined and developed by the Authority and available on its website, and all other documents required to be submitted to the Authority.

(c) "Average Daily Attendance" (ADA) shall mean the unit of attendance as reported by the California Department of Education (CDE) for the second period of the school year.

(d) "CALPADS" shall mean the enrollment information provided through the California Longitudinal Pupil Achievement Data System (CALPADS) to the CDE.

(e) "CBEDS Report" shall mean the enrollment information provided through the California Basic Educational Data System (CBEDS) to the CDE.

(f) "Charter School" shall mean a school meeting the definition of a charter school in Education Code section 47600, et seq. and also meeting the federal definition of charter school as defined in section 5210(1) of the Elementary and Secondary Education Act of 1965 (20 USCA section 7221(i)), as amended by the No Child Left Behind Act of 2001.

(g) "Charter School Facility Grant Program" or "SB 740 Program" shall mean the state-funded per-pupil facility grant program established pursuant to Education Code section 47614.5.

(h) "Chartering Authority" shall mean the governing board of the school district, county board of education, or the State Board of Education, that granted a school's petition to become a charter school pursuant to Education Code section 47605.

(i) "Classroom-Based Instruction" shall have the meaning set forth in Education Code section 47612.5(e)(1).

(j) "Davis-Bacon and Related Acts" shall mean the following federal acts: Davis-Bacon Act -- 40 U.S.C. § 3141, et seq.; Fair Labor Standards Act -- 29 U.S.C. § 201, et seq; Contract Work Hours and Safety Standards Act -- 40 U.S.C. § 3701, et seq.; and Copeland "Anti-Kickback" Act -- 40 U.S.C. § 3145 and 18 U.S.C. § 874.

(k) "Enrollment" shall mean the number of pupils enrolled in a school as collected and reported by the CDE for grades K-12.

(l) "Free and Reduced-Price Meals" (FRPM) shall mean the Free/Reduced Percentage as collected by the CDE, and reported by the CDE for grades K-12.

(m) "Grantee" shall mean the California School Finance Authority (Authority), which will serve as the administrator of the grant and will make final award and disbursement decisions.

(n) "Locale Code" shall mean a categorical code that the U.S. Department of Education has designated to identify the population density associated with a school's physical location. Locale codes are derived by matching a school's physical location represented by an address with U.S. Census Bureau data.

(o) "Low-income" shall refer to the percentage of pupils deemed to be eligible for free/reduced price meals as identified in the FRPM data for the school on file at the CDE and as identified in this section.

(p) "National Center of Education Statistics (NCES)" shall mean the primary entity within the U.S. Department of Education responsible for collecting and analyzing data related to education.

(q) "New Construction Eligibility" shall mean the result of the calculation determined in Education Code sections 17071.75 and 17071.76.

(r) "Nonprofit Entity" shall mean an entity that is organized and operated for an exempt purpose as set forth in Internal Revenue Code section 501(c)(3) and whose net earnings may not inure to the benefit of any private shareholder or individual, or is organized and operated by a nonprofit public benefit corporation, pursuant to State Corporations Code, Title 1, Division 2, Part 2, section 5110, et seq.

Section 10176

Definitions

(continued)

- (s) "Program" shall mean the State Charter School Facilities Incentive Grants Program (CFDA #84.282D).
- (t) "Proposition 39 pro-rata payment" shall mean the pro-rata share payment that a charter school makes for use of a district-held property pursuant to Education Code section 47614(b)(1).
- (u) "Smarter Balanced Assessment System" shall mean the testing criteria required under the Common Core State Standards (CCSS) for English Language Arts/Literacy (ELA) and Mathematics as reported by the CDE.
- (v) "Subgrantee" shall mean an Applicant awarded Program funds on behalf of a charter school.

Any Applicant shall be eligible to apply for a grant if all of the following conditions are met:

- (a) An approved charter has been awarded and is in place and current at the time of application and without interruption throughout the application review and approval process.
- (b) The charter school is in good standing with its chartering authority and is in compliance with the terms of its charter at the time of application submission, and without interruption throughout the term of the grant. The Authority will rely on information from the chartering authority regarding the school's good standing and compliance with the terms of its charter. Charter schools may appeal any response by the chartering authority's staff directly to the chartering authority's governing board. Charter schools have 60 days to cure any noncompliance deficiency identified by the charter authorizer. It shall be the charter school's responsibility, and not the Authority's, to ensure that the good standing and compliance response letter is received by the relevant deadline.
- (c) The charter school has completed at least one school year of instructional operations under its current County-District-School (CDS) Code and charter number issued by the CDE at the time of application.
- (d) If a district-dependent charter school, the school can demonstrate operational and financial autonomy from its authorizing district.
 - (1) Staff will use specific criteria to assess the charter school's degree of autonomy including, but not limited to, the following:
 - a. Governance Structure (e.g., governing board or entity as described in the school's charter):
 - i. Is elected or appointed independently of the chartering authority;
 - ii. Includes less than a majority of the current employees or appointees of the chartering authority; and
 - iii. Operates as and/or is operated by a nonprofit public benefit corporation.
 - b. Operations: The charter school governing board or entity as described in the school's charter maintains control over a majority of its operations (e.g., professional development, school year calendar, disciplinary policies and procedures, curriculum, graduation requirements, etc.).
 - c. Staffing:
 - i. Teachers and staff are employees of the charter school.
 - ii. The charter school retains a majority of decision making authority of all hiring, dismissal, work rule, employee assignment, and other personnel decisions and actions.
 - iii. The charter school governing board or entity as described in the school's charter has adopted its own employment policies and procedures.
 - d. Financial Decisions: The charter school governing board or entity as described in the school's approved charter exhibits control over the development and adoption of the charter school's budget, the receipt and expenditure of funds, business management ("back-office") services, audit services, purchasing and contracting decisions, and other financial matters in general.
 - (2) Staff will review operational and financial documents related to the applicant charter school to determine autonomy on a case-by-case basis. When evaluating the relationship between a charter school and its authorizing district, staff may request any or all of the following:
 - a. Audits;
 - b. County treasury reports;
 - c. Fund 09 Reports;
 - d. Governing Board structure and member lists;
 - e. District and school employee lists;
 - f. Other documents as may be determined necessary by the Authority on a case-by-case basis.
- (e) The charter school is not a current subgrantee at the time of commencement of the grant period (September of each funding year).
- (f) At least eighty percent (80%) of the instructional time offered by the charter school shall be at the school site, and the charter school shall attain an ADA rate of at least eighty percent (80%) based on the school's most recent CALPADS or CBEDS report.
- (g) The charter school is established pursuant to Education Code section 47600, et seq., and also meets the federal definition of charter school as defined in section 5210(1) of the Elementary and Secondary Education Act of 1965 (20 USCA section 7221(i)), as amended by the No Child Left Behind Act of 2001
- (h) The charter school admits students by public lottery in the event more students want to attend the school than the school can accommodate and this process is outlined in the school's charter agreement.

Section 10177

Eligible applicant

80% instructional
time at schoolsite

Section 10177
Eligible applicant
(continued)

- (i) The charter school is able to demonstrate to the satisfaction of the Authority that costs are eligible pursuant to Section 10178.
- (j) The charter school is in compliance with all other programs administered by the Authority, where applicable. Where an educational management organization (EMO) or parent organization has submitted an application on behalf of a charter school, the compliance of affiliate charter schools within the EMO or parent organization is not a requirement.
- (k) The charter school shall not operate as, or be operated by, a for-profit corporation, a for-profit educational management organization, or a for-profit charter organization.

Section 10178
Eligible costs

- (a) Grant funds must be applied toward a charter school's costs of one of the following two options:
 - (1) Base rent, debt service, or Proposition 39 pro-rata payments for existing or new facilities.
 - (A) Projects for base rent receiving funds from the Charter School Facility Grant Program for the same site are ineligible to receive funds under this grant; or
 - (2) Purchase, construction, or renovation of a facility.
 - (A) Projects for renovation receiving funds from the Charter School Facility Grant Program for the same site are ineligible to receive funds under this grant.
- (b) Grant funds must be used to pay current and future facilities costs, for up to a three-year period. Awards may not be used to reimburse a charter school for costs incurred prior to the commencement of the grant period. In addition to documented evidence of annual ongoing costs associated with a charter school facility, the Authority reserves the right to evaluate prior year's facilities costs to determine eligibility for the current funding round.
- (c) Grant funds may not be applied toward a school district's costs of providing a charter school with a facility.
- (d) Grant funds may not be applied toward overhead or other administrative costs of the school or any other entity, such as a school district, county office of education, or charter management organization.
- (e) Grant funds may not be used to: 1) make Charter School Facilities Program (CSFP) payments to the State or 2) satisfy a CSFP recipient's local matching share.
- (f) Grant funds must be expended and liquidated within the guidelines of this article and the Program.

Section 10179
Maximum grant

- (a) Grant awards that are used toward the annual cost of rent or debt service payments for existing or new facilities shall be based on the following:
 - (1) Per-pupil facilities aid for charter schools which shall be awarded to subgrantees in an amount of seven hundred fifty dollars (\$750) per student based on the eligible K - 12 grade student enrollment on file with the CDE, not to exceed seventy five percent (75%) of the annual eligible costs for the current year if available, or based on prior year data if current year data is not available.
 - (2) No individual grant may exceed two hundred and fifty thousand dollars (\$250,000) per year, with a maximum grant period of up to three years. The grant period shall not exceed the end of the funding period as determined by the U.S. Department of Education and referenced in Section 10185.
- (b) Grant awards that are used toward the purchase, construction, or renovation costs of land and facilities, shall be based on the following:
 - (1) Per-pupil facilities aid for charter schools which shall be awarded to subgrantees in an amount of one thousand dollars (\$1,000) per student based on the eligible K - 12 grade student enrollment on file with the CDE, not to exceed seventy five percent (75%) of the total eligible project costs for which the applicant is applying.
 - (2) No individual grant may exceed five hundred thousand dollars (\$500,000) per year, with a maximum grant period of up to three years. The grant period shall not exceed the end of the funding period as determined by the U.S. Department of Education and referenced in Section 10185.
- (c) Grant awards, for up to a three-year period, will be reserved and apportioned from funds available in the year that the subgrantee is awarded funding. The Authority may, at its sole discretion, reduce grant awards to reflect changes in the subgrantee's enrollment, lease costs, or other circumstances.
- (d) Grant funds that become available may be awarded to an alternate applicant from the most recent funding round until the next funding round commences, at which time any funds that become available will be combined with the available funds for the new funding round.
- (e) An organization comprised of more than one charter school may apply for more than one grant by submitting a separate application for each charter school.

Section 10180
Application submission

- (a) Application for grant funds shall be made on an online form prescribed by the Authority and will be available as described below. The Authority will accept applications during the application periods described. One original application package must be received by the Authority during regular business hours by the final filing date. Applications received after the final filing date for each funding round will not be accepted for review and will be returned to the applicant. For organizations with more than one charter school, a separate application is required for each charter school applying for a grant.

Section 10180
Application submission
(continued)

- (b) If the application is not complete at the time of submission, the applicant will be notified of any deficiencies and asked to supply the missing information and/or documentation. Failure to provide the required additional information and/or documentation within the timeframe prescribed by and to the satisfaction of the Authority will result in the applicant being deemed ineligible.
- (c) The application and deadline dates for each funding round will be posted on the Authority's website in March of each year. Grant award determinations will be made no later than August 31st of each fiscal year.

Applications and all supporting documentation shall be submitted to the Authority via the online application system and shall include, but not be limited to the items listed in (a)-(j) below. Applications may not be submitted by email or facsimile.

- (a) Online application (CSFA Form 05-01, revised 3/2016).
- (b) Description of how an award of grant funds for facilities will be used.
- (c) Copy of a current, valid charter agreement, and verification of the expiration date.
- (d) Evidence that the school is organized under section 501(c)(3) of the Internal Revenue Code, or is a nonprofit public benefit corporation pursuant to California Corporations Code section 5110, et seq., if applicable.
- (e) Copy of a current, valid, fully executed lease contract, rental agreement or other documentation verifying required payments and evidence that the term matches or exceeds the anticipated grant term.
- (f) A completed Legal Status Questionnaire (LSQ) submitted in the form set forth in CSFA 05-01.
- (g) For construction/renovation or purchase projects only, a detailed description of the project, including a six-month timeline which demonstrates project readiness, anticipated costs, bids, and other funding sources.
- (h) For construction/renovation or purchase projects only, proof of site control for a minimum of the grant period. Such proof may consist of (1) a current title report issued no more than 90 days prior to Application showing ownership of the site; or (2) a valid, current, enforceable contingent purchase and sale agreement or option agreement between the Applicant and the owner of the subject property, including evidence that all extensions are in place to keep the agreement current through the grant award date.
- (i) For construction/renovation or purchase projects only, evidence of the applicable discretionary use permits and approvals from federal, state, or local planning agencies for the proposed project.
- (j) Agreement and Certification. The applicant shall agree and certify under penalty of perjury to the following terms and conditions as a requirement of receiving any grant funds. The agreement and certification shall be executed by the charter school's executive director, principal, chair of the board, or another authorized individual and shall be included in the application.
- (1) Applicant may be required to return all or a portion of the grant funds including any investment earnings if the applicant fails to use the funds as approved. In cases where the grant will fund architect, design, or engineering fees, or land acquisition costs as part of a construction project, the applicant may be required to return all grant funds and any investment earnings if the Authority cannot determine the associated larger construction project has been completed based on timelines provided within the application. Grant funds shall only be used by the subgrantee in the manner described in the application, unless the Authority approves a change in writing pursuant to section 10186.
- (2) Applicant agrees that any contractors or subcontractors on the project(s) assisted with these federal funds must be in compliance with Davis-Bacon and Related Acts. (40 U.S.C. § 3141, et seq.; 29 U.S.C. § 201, et seq.; 40 U.S.C. § 3701, et seq.; 40 U.S.C. § 3145; and 18 U.S.C. § 874) This section applies to the entire project, even when this grant funding is used to only fund a portion of the project and the other portions are paid for with other funding sources.
- (3) The applicant's project and financial records are subject to audit and inspection by the Authority and the California State Auditor.
- (4) Applicant has either disclosed all legal information as required in the LSQ, or has no legal information to disclose.
- (5) Applicant will notify the Authority in writing at the time of project completion and will include evidence of project completion to the satisfaction of the Authority.
- (6) Applicant will provide all documents and information required by law and meets all necessary requirements prior to the release of any funds.
- (7) Applicant will immediately notify the Authority of any material change to the charter school's location, enrollment, student performance, charter status, or financial condition.
- (8) For all construction, renovation, or purchase projects, a copy of the executed construction contracts and all required permits must be submitted to the Authority no later than one year from the award date and prior to any disbursements. Failure to comply shall result in the subgrantee being declared ineligible under the Program and the forfeited funds will immediately revert back to the Authority.

Section 10181
Content of application

Proof of site control

**Section 10182
Evaluation criteria**

Preference points will be calculated for all eligible applications. An application shall receive preference points based on the total of (a), (b), (c), (d), (e), and (f), up to a maximum of 150 points, as follows:

(a) Low Income: Up to 60 points based on the percentage of pupils at the charter school eligible for FRPM. Preference points assigned shall be based on data collected and reported by the CDE for grades K-12. The following sliding scale will be used to determine the number of preference point

<i>Percentage Eligible for Free and Reduced-Price Meals</i>	<i>Preference Points Assigned</i>
NA or unestablished	0
1-15%	2
16-25%	4
26-30%	8
31-35%	10
36-40%	14
41-45%	18
46-50%	22
51-55%	26
56-60%	28
61-65%	30
66-70%	34
71-75%	38
76-80%	42
81-85%	46
86-87%	50
88-89%	54
90%	55
91%	55.5
92%	56
93%	56.5
94%	57
95%	57.5
96%	58
97%	58.5
98%	59
99%	59.5
100%	60

Overcrowded schoolsite

(b) Overcrowded School Site: If the applicant charter school is physically located within the driving distance of any public school as designated in the table below for which the public school is either 1) eligible for funding under the Overcrowding Relief Grant based on the current list qualified by the most current CALPADS or CBEDS, or 2) meets the criteria for the Critically Overcrowded School program based on the most current CALPADS or CBEDS, as identified for either program by the CDE, the applicant will receive 10 preference points. The driving distance will be determined by the Locale Code assigned by the U.S. Department of Education and found on the National Center for Education Statistics (NCES) website. If no data is available on the NCES website for the applicant charter school, no points will be awarded under this category. The following table will be used to determine the maximum driving distance to receive preference points in this category:

<i>Locale Code</i>	<i>Maximum Driving Distance in Miles</i>
City/ Urban	3
Suburban	10
Town/Rural	15

(c) Nonprofit Entity: If the charter school or entity operating the charter school meets the definition of a nonprofit entity as defined in this article, the application will receive 20 preference points.

(d) Student Performance: If 60% of the charter school's students meet or exceed either the Smarter Balanced Assessment - English Language Arts/Literacy standard or the Smarter Balanced Assessment - Mathematics standard for the most recent year, to the extent data is available for all grades, the applicant will receive 20 preference points. Preference points will be based on data provided by the CDE.

(e) School Choice: If the charter school is providing a school choice option in a community of greatest need, it may receive up to 20 points through the following two options. The charter school may receive 10 points pursuant to subsection (e)(1) and 10 preference points pursuant to subsection (e)(2), to the extent data is available from CDE for all grades.

(1) Smarter Balanced Assessment - English Language Arts / Literacy standard: If the applicant charter school is physically located within the driving distance as found in the table in subsection (b) of any traditional public school serving a minimum of 50 percent of the same grade levels assessed (grades 3-8 and 11) as the applicant charter school for which CDE has calculated Smarter Balanced Assessment - English Language Arts/Literacy standard data and a higher percentage of the applicant charter school's students met or exceeded the Smarter Balanced Assessment - English Language Arts/Literacy standard than did the traditional school's students for the most recent year, the applicant charter school will receive 10 preference points. Verification

Section 10182
Evaluation criteria
(continued)

of Smarter Balanced Assessment - English Language Arts/Literacy standard data shall be based on data provided by the CDE. The driving distance will be determined by the Locale Code assigned by the U.S. Department of Education and found on the NCES website. If no data is available on the NCES website or CDE website for the applicant charter school, no points will be awarded under this category.

(2) Smarter Balanced Assessment - Mathematics Standard: If the applicant charter school is physically located within the driving distance as found in the table in subsection (b) of any traditional public school serving a minimum of 50 percent of the same grade levels assessed (grades 3-8 and 11) as the applicant charter school for which CDE has calculated Smarter Balanced Assessment - Mathematics standard data and a higher percentage of the applicant charter school's students met or exceeded the Smarter Balanced Assessment Mathematics standard than did the traditional public school's students for the most recent year, the applicant charter school will receive 10 preference points. Verification of Smarter Balanced Assessment - Mathematics standard data shall be based on data provided by the CDE. The driving distance will be determined by the Locale Code assigned by the U.S. Department of Education and found on the NCES website. If no data is available on the NCES website or CDE website for the applicant charter school, no points will be awarded under this category.

(f) First-Time Award Competitive Priority: If an applicant charter school has not previously received an award under the Program, the applicant charter school shall receive an additional 20 preference points.

(a) In each funding round, staff shall rank the applications based on the scores received, with the highest score based on preference points ranking first. In the event that more than one application has the same overall score, the application with the highest percentage in the low-income category will receive a higher ranking. If more than one application has the same overall score as well as the same low-income percentage, the application with the highest points in the overcrowded school district category will receive a higher ranking. If application of the tiebreaker described above results in more than one application still having the same ranking, applications with the earliest mailing time will be given preference. Applications that are hand-delivered and do not have a mailing time will be given preference in this situation based on the time received by the Authority.

(b) If the application is not complete at the time of submission, the applicant will be notified of the deficiencies and asked to submit the missing information. Failure to provide the required additional information will result in the applicant being deemed ineligible.

(c) For each funding round, the Authority shall make an initial award for each application, taking into account the ranking of all applications, the total amount of funds requested and the total amount of funds available. In the event total funds requested exceed total funds available, the Authority shall allocate funds beginning with the application scoring the highest ranking, and then proceed with the next highest rank until all funds have been awarded.

Allocations approved by the Authority at a regularly scheduled board meeting shall be awarded as grants to subgrantees. Subgrantees will be notified in writing of the amount of the grant and the disbursement schedule within seven (7) business days of the board meeting.

(a) Grant funds shall be used for the immediate needs of the designated project. Grant funds must be obligated and expended by the dates specified in the grant agreement. The funding period will be no more than three (3) years, which means that all funds must be obligated no more than three (3) years from when a grant is awarded and all funds must be liquidated no more than three (3) years and 90 days from when the grant was awarded by the Authority. The grant is deemed awarded and the grant period begins on the date stated in the Grant Agreement.

(b) The end of the funding periods for the first five (5) funding rounds is designated by the U.S. Department of Education:

(1) The end of the funding period for funding rounds one (1) through five (5) was designated as September 30, 2013.

(2) The end of the funding period for funding rounds six (6) through ten (10) was designated as September 30, 2017.

(3) The end of the funding period for funding rounds 11-15 is currently targeted as September 30, 2019.

(c) No extensions of the funding period will be considered or allowed unless approved in writing by the U.S. Department of Education. Grants to subgrantees that are made within three (3) years of the end of the funding period will be awarded based on the amount of time remaining in the funding period.

(d) Within one year of the grant award date, subgrantees that receive an award for purchase, construction, or renovation shall provide, in form and substance satisfactory to the Authority, any and all documents necessary to establish that the approved project has been initiated. Such subgrantees shall also provide the Authority with semi-annual progress reports and shall annually provide sufficient documentation, as determined by the Authority, to approve disbursements

Section 10183
Award methodology

Section 10184
Approval of grant and notification of subgrantee

Section 10185
Obligation and expenditure of grant funds

Section 10185
Obligation and
expenditure of grant funds
(continued)

equal to one-third of the total award. Failure to draw down an amount equal to one-third of the total award annually will result in the loss of one-third of the total award, less any funds previously distributed in the applicable year. Funds will immediately revert to the Authority.

(1) In extraordinary circumstances and on a case-by case basis, the Authority may approve extensions to the one-third draw down requirement and allow subgrantees an additional time to draw down funds. Subgrantees will be required to submit a request for the extension in writing, including a statement of need to be evaluated by Authority. In no circumstances shall the extension be granted beyond the three-year grant term.

(e) If Authority staff determines at its discretion that the subgrantee does not demonstrate timeliness, readiness, or feasibility in providing verification of continued eligibility for each disbursement, the subgrantee will not be eligible for disbursement of Grant funds.

(f) Subgrantees who fail to respond to inquiries and/or requests from Authority staff may be declared ineligible to continue participation in the Program. Should the Authority, at its sole discretion, deem a subgrantee nonresponsive, it shall be given 90 days to cure all outstanding issues to the satisfaction of the Authority. If all issues are not resolved to the full satisfaction of the Authority within this time, the subgrantee may be declared ineligible to receive all remaining disbursements under the Program and the forfeited funds will immediately revert back to the Authority.

(g) For lease or Proposition 39 subgrantees only, the Authority may increase an award in any year of the three (3) year grant term should the subgrantee's lease costs go up and additional funding become available.

(1) Increases to awards will be calculated and awarded based on the subgrantee's preference points at the time the award was made and based on the Evaluation Criteria cited in Section 10182. Subgrantees with the highest preference points for lease or Proposition 39 awards will be re-evaluated to determine the eligibility of the increased costs and the continued applicability of the preference points. Subgrantees may receive additional funds, up to the increased lease amount, until all newly available funding has been allocated.

Section 10186
Approval of grant use change

The Authority may, on a case-by-case basis, consider a change in the use of the grant funds if the subgrantee demonstrates, to the Authority's satisfaction, that the change is consistent with the Program and this Article.

Section 10187
Grant agreements

The terms and conditions of a grant shall be set forth in a grant agreement, which shall include, but not be limited to, all of the following terms and conditions:

(a) The dates by which the grant funds must be legally obligated, expended and liquidated.

(b) A provision that any unspent grant funds and any unspent investment earnings on such grant funds shall revert to the Authority.

(c) Agreement to comply with this Article and federal requirements pertaining to the Program.

(d) Agreement that the subgrantee will defend, indemnify, and hold harmless the Authority and the state, and all officers, trustees, agents, and employees of the same, from and against any and all claims, losses, costs, damages, or liability of any kind or nature, whether direct or indirect, arising from or relating to the grant and the project or the Program.

(e) Agreement that the grant shall only be used for projects as described in the subgrantee's application and approved by the Authority.

(f) Any audit provisions as required by the Authority and/or the U.S. Department of Education.

(g) The charter school shall continuously maintain its good standing with the chartering authority and its compliance with the terms of the charter. The Authority reserves the right to contact the chartering authority directly seeking written verification that the school is in good standing and in compliance with the terms of its charter.

(h) Applicants are required to notify the Authority within 30 days of any material changes to the charter school, including changes to the school name; facility address and lease terms; enrollment charter status and charter authorizer; nonprofit status; financial condition; or scope of the project that occurs between the time of application and the time of completing the project and submitting the final performance report.

(i) Current enrollment based on CALPADS or CBEDS is to be reported to the Authority within 30 days of the end of each Academic Year, until the time at which project completion and the final performance report is submitted.

(j) In the event that the charter school is not in compliance with its charter authorizer or the charter is not in good standing, not renewed, or revoked at any time during the grant period, the subgrantee will advise the Authority within 30 days of notification of such action, including providing the Authority with a copy of the document provided by the chartering entity notifying the charter school of such action.

(k) All subgrantees are required to submit two copies of a final performance report within 60 days after the expiration or termination of grant support.

(l) The format of all performance reports will be provided by the Authority and will include information requested by the U.S. Department of Education.

(m) Any other provisions required by the Authority and/or the U.S. Department of Education.

(a) No grant funds shall be released until the grant agreement and supporting attachments have been provided and it has been determined by the Authority that the charter school continuously meets the requirements of the grant program.

Applicants shall be afforded three options for disbursement of grant funds, depending on the use of the grant award:

(1) Option One: Base Rent/Debt Service/Proposition 39 pro-rata payments. Under the first option, charter schools shall apply monthly disbursements of grant funds toward the eligible monthly costs of rentor debt service payments over a three-year period, if such costs are sufficiently documented to the Authority's satisfaction.

(A) Grant fund awards shall be released on the dates listed in the grant agreement.

(B) All disbursements of Grant fund awards shall be processed according to the schedule established by the Authority.

(C) All subgrantees shall submit documentation of continued eligibility on a semi-annual basis during the months of February and August.

(D) Documentation of continued eligibility shall include, but not be limited to, copies of the current charter and current lease(s); verification of any changes to the subgrantee's name, project, project location, or facility costs; executed amendments to the grant agreement, when appropriate; and verification and/or status of pending or threatened legal issues or investigations.

(E) Documentation of continued eligibility shall require verification the subgrantee charter school is continuously in good standing with its chartering authority and continuously in compliance with the terms of its charter without interruption throughout the term of the grant. The Authority will rely on information from the chartering authority regarding the school's good standing and compliance with the terms of its charter. Charter schools may appeal any response by the chartering authority's staff directly to the chartering authority's governing board. It shall be the charter school's responsibility, and not the Authority's, to ensure that the good standing and compliance response letter is received by the relevant deadline.

(F) Documentation of continued eligibility shall require submission of a completed LSQ (as may be amended from time to time) disclosing information relating to any legal or regulatory proceedings or investigations in which the subgrantee or its parent/subsidiary/affiliate is or has been a party and which might have a material impact on the financial or educational viability of the charter school. The responses to the LSQ and all supporting documents related to the responses will be reviewed by Authority staff and legal counsel prior to authorizing additional disbursements of grant funds.

(G) Documentation of continued eligibility must be received and approved by the Authority on or before February 28 and August 31 of each year in order for the Authority to release a disbursement.

(H) Failure to meet the February 28 or August 31 deadline shall result in the subgrantee being declared ineligible to receive the first monthly disbursement of the respective semi-annual disbursement period. The forfeited funds cannot be disbursed retroactively and will immediately revert back to the Authority.

(I) If the required documentation is not received and approved by the Authority within 30 calendar days following the February 28 and August 31 deadline, the subgrantee shall be declared ineligible to receive the remaining five monthly disbursements for the respective semi-annual disbursement period. The forfeited funds cannot be distributed retroactively and will immediately revert back to the Authority.

(J) Failure to meet the semi-annual deadlines consecutively and provide documentation within 30 calendar days from each deadline shall result in the subgrantee being declared ineligible to receive all remaining disbursements under the grant program. The forfeited funds will immediately revert back to the Authority.

(2) Option Two: Construction/Renovation. Under the second disbursement option, charter schools shall have the choice of applying grant funds (equal to a three-year award) toward the costs of constructing or renovating a facility, if such costs are sufficiently documented to the Authority's satisfaction. Charter schools requesting the second option will be required to demonstrate project readiness at the time of application. Such project readiness may include, but not be limited to proof of site control for the term of the grant and detailed project plans and drawings.

(A) Processing Disbursements:

1. Requests for disbursement shall be processed when the Authority, in its sole discretion, determines that the invoices and supporting documents are complete.

2. Repeated failure by the subgrantee to timely respond to Authority staff's request for additional documentation or information related to disbursement requests may result in subgrantee being found ineligible to receive grant funds as described in Section 10185.

(B) Subgrantees are required to draw down an amount equal to one-third of their total award within the first year of the grant term. Failure to draw down an amount equal to one-third of the total award annually will result in the loss of one-third of the total award, less any funds previously distributed in the applicable year. Funds will immediately revert to the Authority.

1. In extraordinary circumstances and on a case-by case basis, the Authority may approve extensions to the one-third draw down requirement and allow subgrantees additional time to draw down funds. Subgrantees will be required to submit a request for the extension including a statement of need to be evaluated by Authority. In no circumstances shall the extension be granted beyond the three-year grant term.

Section 10188
Release of funds
(continued)

- (C) All subgrantees shall submit documentation of continued eligibility on a semi-annual basis during the months of February and August.
- (D) Documentation of continued eligibility shall include, but not be limited to, copies of the current charter and current lease(s); verification of any changes to the subgrantee's name, project, project location, or facility costs; executed amendments to the grant agreement, when appropriate; and verification and/or status of pending or threatened legal issues or investigations.
- (E) Documentation of continued eligibility shall require verification the subgrantee charter school is continuously in good standing with its chartering authority and continuously in compliance with the terms of its charter without interruption throughout the term of the grant. The Authority will rely on information from the chartering authority regarding the school's good standing and compliance with the terms of its charter. Charter schools may appeal any response by the chartering authority's staff directly to the chartering authority's governing board. It shall be the charter school's responsibility, and not the Authority's, to ensure that the good standing and compliance response letter is received by the relevant deadline.
- (F) Documentation of continued eligibility shall require submission of a completed LSQ (as may be amended from time to time) disclosing information relating to any legal or regulatory proceedings or investigations in which the subgrantee or its parent/subsidiary/affiliate is or has been a party and which might have a material impact on the financial or educational viability of the charter school. The responses to the LSQ and all supporting documents related to the responses will be reviewed by Authority staff and legal counsel prior to authorizing additional disbursements of grant funds.
- (G) Documentation of continued eligibility must be received and approved by the Authority on or before February 28 and August 31 of each year in order for the Authority to release a disbursement.
- (H) Failure to meet the February 28 or August 31 deadline shall result in the subgrantee being declared ineligible to receive the first monthly disbursement of the respective semi-annual disbursement period. The forfeited funds cannot be disbursed retroactively and will immediately revert back to the Authority.
- (I) If the required documentation is not received and approved by the Authority within 30 calendar days following the February 28 and August 31 deadline, the subgrantee shall be declared ineligible to receive the remaining five monthly disbursements for the respective semi-annual disbursement period. The forfeited funds cannot be distributed retroactively and will immediately revert back to the Authority.
- (J) Failure to meet the semi-annual deadlines consecutively and provide documentation within 30 calendar days from each deadline shall result in the subgrantee being declared ineligible to receive all remaining disbursements under the grant program. The forfeited funds will immediately revert back to the Authority.
- (3) Option Three: Purchase. Under the third disbursement option, charter schools shall have the choice of applying grant funds (equal to a three-year award) toward the costs of acquiring a facility or land, if such costs are sufficiently documented to the Authority's satisfaction. Charter schools requesting the third option will be required to demonstrate a commitment toward the acquisition of a facility at the time of application. Such commitment may include, but not be limited to, verification of the charter school's possession of an option to purchase land.
- (A) Processing Disbursements:
1. Requests for disbursement shall be processed when the Authority, in its sole discretion, determines that the invoices and supporting documents are complete.
 2. Repeated failure by the subgrantee to timely respond to Authority staff's request for additional documentation or information related to disbursement requests may result in subgrantee being found ineligible to receive grant funds as described in Section 10185.
- (B) Subgrantees are required to draw down an amount equal to one-third of their total award within the first year of the grant term. Failure to draw down an amount equal to one-third of the total award annually will result in the loss of one-third of the total award, less any funds previously distributed in the applicable year. Funds will immediately revert to the Authority.
- (1) In extraordinary circumstances and on a case-by case basis, the Authority may approve extensions to the one-third draw down requirement and allow subgrantees additional time to draw down funds. Subgrantees will be required to submit a request for the extension in writing, including a statement of need to be evaluated by Authority. In no circumstances shall the extension be granted beyond the three-year grant term.
- (C) All subgrantees shall submit documentation of continued eligibility on a semi-annual basis during the months of February and August.
- (D) Documentation of continued eligibility shall include, but not be limited to, copies of the current charter and current lease(s); verification of any changes to the subgrantee's name, project, project location, or facility costs; executed amendments to the grant agreement, when appropriate; and verification and/or status of pending or threatened legal issues or investigations.
- (E) Documentation of continued eligibility shall require verification the subgrantee charter school is continuously in good standing with its chartering authority and continuously in compliance with the terms of its charter without interruption throughout the term of the grant. The Authority will rely on information from the chartering authority regarding the school's good standing

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Release of funds
(continued)

and compliance with the terms of its charter. Charter schools may appeal any response by the chartering authority's staff directly to the chartering authority's governing board. It shall be the charter school's responsibility, and not the Authority's, to ensure that the good standing and compliance response letter is received by the relevant deadline.

(F) Documentation of continued eligibility shall require submission of a completed LSQ (as may be amended from time to time) disclosing information relating to any legal or regulatory proceedings or investigations in which the subgrantee or its parent/subsidiary/affiliate is or has been a party and which might have a material impact on the financial or educational viability of the charter school. The responses to the LSQ and all supporting documents related to the responses will be reviewed by Authority staff and legal counsel prior to authorizing additional disbursements of grant funds.

(G) Documentation of continued eligibility must be received and approved by the Authority on or before February 28 and August 31 of each year in order for the Authority to release a disbursement.

(H) Failure to meet the February 28 or August 31 deadline shall result in the subgrantee being declared ineligible to receive the first monthly disbursement of the respective semi-annual disbursement period. The forfeited funds cannot be disbursed retroactively and will immediately revert back to the Authority.

(I) If the required documentation is not received and approved by the Authority within 30 calendar days following the February 28 and August 31 deadline, the subgrantee shall be declared ineligible to receive the remaining five monthly disbursements for the respective semi-annual disbursement period. The forfeited funds cannot be distributed retroactively and will immediately revert back to the Authority.

(J) Failure to meet the semi-annual deadlines consecutively and provide documentation within 30 calendar days from each deadline shall result in the subgrantee being declared ineligible to receive all remaining disbursements under the grant program. The forfeited funds will immediately revert back to the Authority.

(b) Subgrantees applying grant funds toward the costs of acquiring land and purchasing, constructing, or renovating a facility must also provide all documentation verifying eligible costs annually, as described in Section 10185.

(a) The subgrantee shall certify to the Authority that the project is complete and, to the extent not already provided to the Authority, provide supporting documentation as follows:

(1) Construction and renovation projects require, prior to final disbursement, documentation including, but not limited to, copies of the certificate of occupancy, final payment certification by the architect, final payment request from the contractor and corresponding copies of cancelled checks. If the subgrantee does not provide copies of cancelled checks, the subgrantee shall provide wire transfers, electronic fund transfers, or other evidence acceptable to the Authority in lieu of copies of cancelled checks.

(2) Real property acquisition projects require a copy of the final closing statement with certification by the title company, to be received by the Authority within 60 days of the disbursement of grant funds.

(b) If the subgrantee fails to complete the project within the project period, the Authority may require remedies, including forfeiture and return of all grant funds and any accrued interest thereon to the Authority.

(c) The Authority reserves the right to conduct site visits to any charter school facility or project receiving a grant pursuant to this Article.

(d) The Authority or Authority staff may seek third party verification regarding any and all applicable costs associated with the facility/project receiving a grant pursuant to this Article.

(a) The Authority and/or the Bureau of State Audits may conduct or require periodic audits to ensure subgrantees are using grant funds consistent with the requirements and the terms of the Program, the State Charter School Facilities Incentive Grant, and this article as approved. Subgrantees shall retain all documentation and financial data necessary to substantiate the purposes for which the grant funds were spent for a period of three years after the certification of completion of the project has been submitted or three years after the end of the funding period, whichever is longer.

(b) Subgrantees must avoid apparent and actual conflicts of interest when administering grants from the U.S. Department of Education. Department regulations at 34 CFR 75.525(a) prohibit a person from participating in an administrative decision regarding a project if (a) the decision is likely to benefit that person or his or her immediate family members; and (b) the person is a public official or has a family or business relationship with the subgrantee. Section 75.525(b) provides further that a subgrantee may not permit any person participating in a project to use his or her position for a purpose that is - or gives the appearance of being - motivated by a desire for a private or financial gain for that person or for others.

(c) When using federal funds to enter into a contract, a State or local entity receiving a grant must comply with 34 CFR 80.36. These standards require federal grant subgrantees to develop written procurement procedures and to conduct all procurement transactions in a manner that provides,

Section 10189
Completion of grant
funded construction project

Section 10190
Audits and conflicts of interest

Section 10190

Audits and conflicts of interest

(continued)

to the maximum extent possible, open and free competition. No employee, officer, or agent of the subgrantee may participate in the selection, award, or administration of any contract supported by federal funds if a real or apparent conflict of interest exists.

(d) When these funds are used for construction-related activities, such as constructing a school building, renovating an existing owned school facility, or making leasehold improvements, contractors or subcontractors on the projects assisted with these federal funds must be in compliance with Davis-Bacon and Related Acts. (40 U.S.C. § 3141, et seq.; 29 U.S.C. § 201, et seq.; 40 U.S.C. § 3701, et seq.; 40 U.S.C. § 3145; and 18 U.S.C. § 874.)

(e) The Authority reserves the right to conduct site visits to any charter school facility or project receiving a grant pursuant to this Article.

Section 10191

Funding contingency

(a) This grant program is contingent upon the receipt of funds in each budget period as scheduled by the U.S. Department of Education.

(b) Continuing apportionments to subgrantees will be contingent upon the subgrantee's eligibility to receive such apportionments.

CHARTER SCHOOL FACILITIES CREDIT ENHANCEMENT PROGRAM

California Code of Regulations, Title 4

Section 10192

Purpose

This Article implements the California School Finance Authority's administration of the Charter School Facilities Credit Enhancement Grant Program (CFDA #84.354A) funds(s) received by the Authority from the U. S. Department of Education to provide credit enhancement to facilitate the purchase, construction, and/or renovation of facilities for California public Charter Schools.

Section 10193

Definitions

For the purposes of this Article, the words and phrases defined in section 17173 of the Education Code shall have the same meaning as described therein. In addition, the following words and phrases shall have the meaning as described below:

(a) "API" shall mean the Academic Performance Index summarizing a school's performance on the Standardized Testing and Report Program and California High School Exit Examination tests, as reported by the California Department of Education.

(b) "Applicant" shall mean the Charter School, school district, or educational management organization applying on behalf of a Charter School for an award under this Article.

(c) "Application" shall mean a completed Application for financing as defined and developed by the Authority and available on its website, and all other documents required to be submitted to the Authority.

(d) "Awardee" means an Applicant awarded program funds on behalf of a Charter School.

(e) "Charter School" shall mean a school established pursuant to Education Code section 47600 et seq. and also meets the federal definition of Charter School as defined in section 5210(1) of the Elementary and Secondary Education Act of 1965 (20 USCA section 7221(i)), as amended by the No Child Left Behind Act of 2001.

(f) "Charter Authorizer" shall mean the governing board of the school district, county board of education, or the State Board of Education, that granted a school's petition to become a Charter School pursuant to Education Code section 47605.

(g) "Financing" shall mean one or more series of conduit bonds issued by the California School Finance Authority within a 60-day period to finance the Applicant's project pursuant to the same plan of financing with bond repayment expected to be from the same source of funds.

(h) "Program" means the Charter School Facilities Credit Enhancement Grant Program (CFDA 84.354A).

Section 10194

Applicant eligibility criteria

An Applicant shall be eligible to apply for an award of a reservation of funds under this Program if all of the following conditions are met:

(a) An approved charter has been awarded and is in place and current at the time of Application throughout the Application review and approval process and throughout the term of an award.

(b) The Charter School is in good standing with its Charter Authorizer and is in compliance with the terms of its charter at the time of Application submission. The Authority will rely on information from the Charter Authorizer regarding the Charter School's good standing and compliance with the terms of its charter.

(c) The Applicant has completed at least one school year of instructional operations.

(d) At least eighty percent (80%) of the instructional time offered by the Charter School shall be at the school site, and the Charter School shall attain an average daily attendance rate of at least eighty percent (80%).

(e) The Charter School is established pursuant to Education Code section 47600 et seq., and also meets the federal definition of Charter School as defined in section 5210(1) of the Elementary and Secondary Education Act of 1965 (20 USCA section 7221(i)), as amended by the No Child Left Behind Act of 2001.

(f) The Charter School admits students by lottery in the event more students want to attend the school than the Charter School can accommodate.

- (a) Program funds must be applied toward funding the primary debt service reserve requirement for debt issued by or through the Authority for an Awardee to acquire, renovate or construct Charter School facilities, or refinance existing Charter School facility debt.
- (b) The Authority may make awards of up to maximum annual debt service per Financing, with an award dollar limit of \$2,000,000 for uses listed in subdivision (a) above.
- (c) The term of repayment for any financing in conjunction with a Program award, pursuant to this Article, shall not exceed the useful life of the financed asset.
- (d) The grant award shall be held in trust by the Authority or an Authority approved financial institution, solely for authorized purposes and shall not be released to Awardees without the Authority's or trustee's approval. As deemed appropriate by the Authority, conditions for release of the Program funds throughout the term of the financing will be determined by the Authority, in collaboration with all lending parties, prior to closing of the financing.
- (e) Awards of a reservation of funds shall be released and returned to the Authority when the funds are no longer needed for the authorized purposes.
- (f) Awards of a reservations of funds will expire if the Awardee does not use the awarded funds within six months of Authority approval. Exceptions may be granted by the Authority.

**Section 10195
Eligible use of program
funds and maximum award**

The Authority will evaluate and determine Program awards based on the following:

- (a) The Applicant meets all Applicant Eligibility Criteria under Section 10194.
- (b) The Authority may make awards of up to the maximum annual debt service per Financing, with an award dollar limit of \$2,000,000, for uses listed in subdivision (a) above.
- (c) In addition, the Authority may evaluate the following criteria as it relates to the Applicant:
 - (1) At least fifty-percent (50%) of the Charter School's pupils are eligible for free and/or reduced meals as reported by the California Department of Education for the most current year.
 - (2) Student performance data for the last three academic years under the API, if available;
 - (3) A commitment of substantial equity toward the project being financed; and/or
 - (4) An award of additional tax-advantaged financing instruments.
- (d) Grants under the Program shall be available and awarded on a rolling first-come, first-served basis to the extent that funding and appropriations are available, and the requirements of the Program are satisfied. The Application review process will remain open only to the extent of available funding and appropriations.

**Section 10196
Application review
and evaluation criteria**

Completed Applications for award of a reservation of funds and all supporting documentation shall be submitted to the Authority and shall include, but not be limited to, all of the following:

- (a) Application for a reservation of funds designated by the Authority for an applicable financing program.
- (b) A detailed description of the school facility to be financed with the award.
- (c) Description of how the award provided through the facilities financing will be used.
- (d) Copy of current charter agreement and verification of the expiration date.
- (e) Evidence that the Charter School operates as, or is operated by, a nonprofit public benefit corporation formed and organized pursuant to the Nonprofit Public Benefit Corporation Law (Part 2 (commencing with section 5110) of Division 2 of Title 1 of the Corporations Code), or is organized under section 501(c)(3) of the Internal Revenue Code or other evidence, satisfactory to the Authority, that the school operates on a nonprofit basis.
- (f) A completed questionnaire of the entity's legal status.
- (g) Adopted budget for the current year.
- (h) Projected budgets for the next three years.
- (i) Audited financial statements for the last three years, if applicable.
- (j) Information regarding student performance, attendance, enrollment and retention rates.
- (k) Documentation that the Applicant holds title or other interest in the financed facility, including right of access.
- (l) Verification the Charter School is in good standing with its Charter Authorizer and in compliance with the terms of its charter at the time of Application submission and throughout the term the funds are reserved. Such verification must be provided directly from the Charter Authorizer on a form provided by the Authority. Charter Schools may appeal any response by the Charter Authorizer's staff directly to the Charter Authorizer's governing board.
- (m) Any additional information that the Authority deems necessary to evaluate the Application.

**Section 10197
Content of application**

- (a) The State may conduct or require periodic audits to ensure Awardees are using funds consistent with the requirements and the terms of the Program, the related financing program, and this Article as approved. Awardees shall retain all documentation and financial data necessary to substantiate the purposes for which the financing funds were spent for a period of three years after the certification of completion and repayment of the debt or three years after the Program funds are no longer held in reserve, whichever is longer.

**Section 10198
Audits and conflicts of interest**

- (b) Applicants and Awardees must avoid apparent and actual conflicts of interest when participating in grants from the U.S. Department of Education. U.S. Department of Education regulations at 34 CFR 75.525(a) prohibit a person from participating in an administrative decision regarding a project if (a) the decision is likely to benefit that person or his or her immediate family members; and (b) the person is a public official or has a family or business relationship with the Awardee. 34 CFR 75.525(b) provides further that an Awardee

Section 10198
Audits and conflicts of interest

(continued)

may not permit any person participating in a project to use his or her position for a purpose that is -- or gives the appearance of being -- motivated by a desire for a private or financial gain for that person or for others.

(c) When relying on federal funds to enter into a contract, a State or local entity benefiting from a grant must comply with 34 CFR 80.36. These standards require federal grant Awardees to develop written procurement procedures and to conduct all procurement transactions in a manner that provides, to the maximum extent possible, open and free competition. No employee, officer, or agent of the Awardee may participate in the selection, award, or administration of any contract supported by federal funds if a real or apparent conflict of interest exists.

(d) The Authority reserves the right to conduct site visits to any Charter School facility or project receiving a reservation of funds pursuant to this Article.

(e) Participants will be required to routinely submit documentation in order to support continued eligibility on at least an annual basis.

(f) Awardees shall comply with all State and Federal requirements throughout the award period.

Section 10199
Funding contingency

(a) Program funds will be released upon the execution of a Program agreement with the Authority.

(b) This Program is contingent upon the receipt and ongoing availability of funds by the U.S. Department of Education.

**PROJECT ACCELERATION NOTES AND
CREDIT ENHANCEMENT ALTERNATIVES PROGRAM (PANACEA) PROGRAM
California Code of Regulations, Title 4**

Section 10200
Purpose

This Article implements the California School Finance Authority's (Authority) administration of the Charter School Facilities Credit Enhancement Grant Program (CFDA #84.354A) fund(s) received by the Authority from the U. S. Department of Education. The funds will be disbursed through the Authority's Project Acceleration Notes and Credit Enhancement Alternatives (PANACEA) Program (Program) to provide credit enhancement to facilitate the financing of the purchase, construction, and/or renovation of facilities for California public Charter Schools. Funds awarded under the Program will be used in conjunction with funding provided through the Charter School Facilities Program (CSFP) or the Authority's Conduit Financing Program (Non-CSFP).

Section 10200.1
Definitions

The following words and phrases shall have the meaning as described below:

(a) "Applicant" shall mean the Charter School, school district, or educational management organization applying on behalf of a Charter School for an award under this Article.

(b) "Authority" shall mean the California School Finance Authority.

(c) "Awardee" shall mean an Applicant awarded program funds on behalf of a Charter School.

(d) "Charter School" shall mean a school established pursuant to Education Code section 47600 et seq. and also meets the federal definition of Charter School as defined in section 5210(1) of the Elementary and Secondary Education Act of 1965 (20 USCA section 7221(i)), as amended by the No Child Left Behind Act of 2001.

(e) "Charter School Facilities Program" (CSFP) shall mean the program established pursuant to Article 12 of Chapter 12.5 of Part 10 of the Education Code and jointly administered by the Authority and the Office of Public School Construction (OPSC).

(f) "Charter Authorizer" shall mean the governing board of the school district, county board of education, or the State Board of Education, that granted a school's petition to become a Charter School pursuant to Education Code section 47605.

(g) "Conduit Financing Program" or "Non-CSFP" shall mean the Authority's financing program established through Education Code 17180, et. seq.

(h) "ESEA" shall mean the Elementary and Secondary Education Act of 1965 (20 USCA section 7221(i)).

(i) "Financing" shall mean one or more series of conduit bonds issued by the California School Finance Authority within a 60-day period to finance the Applicant's project pursuant to the same plan of financing with bond repayment expected to be from the same source of funds.

(j) "NCLB" shall mean the No Child Left Behind Act of 2001.

(k) "PANACEA Program Application" shall mean Form CSFA 07-01 (rev. September 2018), incorporated herein by reference.

(l) "Program" shall mean the Project Acceleration Notes and Credit Enhancement Alternatives (PANACEA) (CFDA #84.354A).

Section 10200.2
Applicant eligibility criteria

An Applicant shall be eligible to apply for an award of a reservation of funds under this Program if all of the following conditions are met, where applicable:

(a) In the case of an Application associated with CSFP funding, an Advance or Final Apportionment has been awarded under CSFP.

(b) An approved charter has been awarded and is in place and current at the time of Application throughout the Application review and approval process and throughout the term of an award.

(c) The Charter School is in good standing with its Charter Authorizer and is in compliance with the terms of its charter at the time of Application submission. The Authority will rely on information

from the Charter Authorizer regarding the Charter School's good standing and compliance with the terms of its charter.

(d) The Charter School is established pursuant to Education Code section 47600 et seq., and also meets the federal definition of Charter School as defined in section 5210(1) of the ESEA as amended by the NCLB of 2001.

(a) The Authority may make awards of up to the maximum annual debt service per Financing, with an award dollar limit of \$2,000,000 for uses listed in subdivision (b) below.

(b) Program funds may be applied towards funding the primary debt service reserve requirement for: (1) interim financing associated with a CSFP project; or (2) debt associated with the acquisition, renovation, construction and / or refinancing of charter school facilities.

(c) The grant award shall be held in trust by the Authority or an Authority approved financial institution, solely for authorized purposes and shall not be released to Awardees without the Authority's or trustee's approval. As deemed appropriate by the Authority, conditions for release of the Program funds throughout the term of the financing will be determined by the Authority, in collaboration with all lending parties, prior to closing of the financing.

(d) Awards of a reservation of funds shall be released and returned to the Authority when the funds are no longer needed for the authorized purposes.

(e) Awards of a reservation of funds will expire if the Awardee does not use the awarded funds by closing the financing within six months of Authority approval. Exceptions may be granted by the Authority.

(a) Grants under the Program shall be available and awarded on a rolling first-come, first-served basis to the extent that funding and appropriations are available, and the requirements of the Program are satisfied. The Application review process will remain open only to the extent of available funding.

(b) Applicants must meet one of the following criteria in order to be eligible for funding. The Authority will evaluate and determine Program awards based on the following, with increasing preference given based on the number of criteria the Applicant meets:

(1) Applicants located in a school district and/or county where at least 50% of students do not meet the State standard for proficiency in either math or language on the state assessment; or

(2) Applicants located in a school district and/or county with 60% or more of the student population eligible for free or reduced-price lunch; or

(3) Applicants having more than 50% of current or projected student enrollment who are eligible for free or reduced-price lunch; or

(4) Applicants located in a school district and/or county where at least 15% of public schools have been identified for improvement or corrective action or schools identified by the California Department of Education, pursuant to ESEA as amended by the NCLB of 2001, as needing support; or

(5) Applicants awarded an Advance or Final apportionment through CSFP.

(a) For Applicants seeking an award related to a CSFP project, the following must be submitted to the Authority and shall include, but not be limited to, all of the following:

(1) PANACEA Program Application (with the CSFP Financing box checked);

(2) Copy of CSFP Award Letter from the Office of Public School Construction (OPSC), if applicable;

(3) A detailed description of the project costs to be enhanced with the award;

(4) A detailed timeline of the project's relevant milestones;

(5) Copy of current charter agreement and verification of the expiration date;

(6) Verification the Charter School is in good standing with its Chartering Authorizer and in compliance with the terms of its charter. Such verification must be provided directly from the Chartering Authorizer on Form CSFA 07-03 (rev. September 2018), incorporated herein by reference. Charter Schools may appeal any response by the Chartering Authorizer's staff directly to the Chartering Authorizer's governing board. It shall be the Charter School's responsibility, and not the Authority's, to ensure that the good standing and compliance response letter is received by the stated deadline(s);

(7) A completed legal status questionnaire Form CSFA 07-04 (rev. September 2018), incorporated herein by reference; and

(8) Any additional information that the Authority deems necessary to evaluate the Application.

(b) For Applicants seeking grant funds in connection with non-CSFP financing to be issued by the Authority, the following must be submitted to the Authority and shall include, but not be limited to, all of the following:

(1) PANACEA Program Application (with the Non-CSFP Financing box checked);

(2) A detailed description of the project costs to be enhanced with the award;

(3) A detailed timeline of the project's relevant milestones;

(4) Copy of current charter agreement and verification of the expiration date;

(5) Verification the Charter School is in good standing with its Chartering Authorizer and in compliance with the terms of its charter. Such verification must be provided directly from the Chartering Authorizer

Section 10200.2 Applicant eligibility criteria (continued)

Section 10200.3 Award allocation and eligible use of program funds

Section 10200.4 Application review and evaluation criteria

Section 10200.5 Content of application

Section 10200.5
Content of application

(continued)

on Form CSFA 07-03 (rev. September 2018), incorporated herein by reference. Charter Schools may appeal any response by the Chartering Authorizer's staff directly to the Chartering Authorizer's governing board. It shall be the Charter School's responsibility, and not the Authority's, to ensure that the good standing and compliance response letter is received by the stated deadline(s);

(6) A completed legal status questionnaire Form CSFA 07-04 (rev. September 2018), incorporated herein by reference; and

(7) Any additional information that the Authority deems necessary to evaluate the Application.

(8) Evidence that the Charter School operates as, or is operated by, a nonprofit public benefit corporation formed and organized pursuant to the Nonprofit Public Benefit Corporation Law (Part 2 (commencing with section 5110) of Division 2 of Title 1 of the Corporations Code), or is organized under section 501(c)(3) of the Internal Revenue Code or other evidence, satisfactory to the Authority, that the school operates on a nonprofit basis.

(9) Adopted budget for the current year.

(10) Projected budgets for the next three years.

(11) Audited financial statements for the last three years, if applicable.

(12) Three year historical and five year projected enrollment figures including retention rates.

(13) Documentation that the Applicant holds title or other interest in the financed facility, including right of access.

Section 10200.6
Audits and conflicts of interest

(a) The State may conduct or require periodic audits to ensure Awardees are using funds consistent with the requirements and the terms of the Program, the related financing program, and this Article as approved. Awardees shall retain all documentation and financial data necessary to substantiate the purposes for which the financing funds were spent for a period of three years after the certification of completion and repayment of the debt or three years after the Program funds are no longer held in reserve, whichever is longer.

(b) Applicants and Awardees must avoid apparent and actual conflicts of interest when participating in grants from the U.S. Department of Education. U.S. Department of Education regulations at 34 CFR 75.525(a) prohibit a person from participating in an administrative decision regarding a project if (a) the decision is likely to benefit that person or his or her immediate family members; and (b) the person is a public official or has a family or business relationship with the Awardee. 34 CFR 75.525(b) provides further that an Awardee may not permit any person participating in a project to use his or her position for a purpose that is - or gives the appearance of being - motivated by a desire for a private or financial gain for that person or for others.

(c) When relying on federal funds to enter into a contract, a State or local entity benefiting from a grant must comply with 34 CFR 80.36. These standards require federal grant Awardees to develop written procurement procedures and to conduct all procurement transactions in a manner that provides, to the maximum extent possible, open and free competition. No employee, officer, or agent of the Awardee may participate in the selection, award, or administration of any contract supported by federal funds if a real or apparent conflict of interest exists.

(d) The Authority reserves the right to conduct site visits to any Charter School facility or project receiving a reservation of funds pursuant to this Article.

(e) Participants will be required to routinely submit documentation in order to support continued eligibility on at least an annual basis.

(f) Awardees shall comply with all State and Federal requirements throughout the award period.

Section 10200.7
Funding contingency

(a) Program funds will be released upon the execution of a performance agreement between the Authority and U.S. Department of Education.

(b) This Program is contingent upon the receipt and ongoing availability of funds by the U.S. Department of Education.

**PART IV: LAWS AND REGULATIONS FOR INDEPENDENT STUDY
AND CLASSROOM & NON-CLASSROOM BASED INSTRUCTION**

INDEPENDENT STUDY

Education Code

(a) Commencing with the 1990–91 school year, a local educational agency may offer independent study to meet the educational needs of pupils in accordance with the requirements of this article. For the 2021–22 school year only, the governing board of a school district or a county office of education shall offer independent study to meet the educational needs of pupils. Educational opportunities offered through independent study may include, but shall not be limited to, the following:

- (1) Special assignments extending the content of regular courses of instruction.
- (2) Individualized study in a particular area of interest or in a subject not currently available in the regular school curriculum.
- (3) Continuing and special study during travel.
- (4) Volunteer community service activities and leadership opportunities that support and strengthen pupil achievement.
- (5) Individualized study for a pupil whose health would be put at risk by in-person instruction, as determined by the parent or guardian of the pupil, or a pupil who is unable to attend in-person instruction due to a quarantine due to exposure to, or infection with, COVID-19, pursuant to local or state public health guidance.

(b) Beginning July 1, 2021, with the exception of pupils participating in independent study programs due to an emergency, as described in Sections 41422 and 46392, not more than 10 percent of the pupils participating in an opportunity school or program, or a continuation high school, calculated as specified by the department, shall be eligible for apportionment credit for independent study pursuant to this article. A pupil who is pregnant or is a parent who is the primary caregiver for one or more of their children shall not be counted within the 10 percent cap.

(c) An individual with exceptional needs, as defined in Section 56026, may participate in independent study, if the pupil’s individualized education program developed pursuant to Article 3 (commencing with Section 56340) of Chapter 4 of Part 30 specifically provides for that participation. If a parent or guardian of an individual with exceptional needs requests independent study pursuant to paragraph (5) of subdivision (a), the pupil’s individualized education program team shall make an individualized determination as to whether the pupil can receive a free appropriate public education in an independent study placement. A pupil’s inability to work independently, the pupil’s need for adult support, or the pupil’s need for special education or related services shall not preclude the individualized education program team from determining that the pupil can receive a free appropriate education in an independent study placement.

(d) A temporarily disabled pupil shall not receive individual instruction pursuant to Section 48206.3 through independent study.

(e) No course included among the courses required for high school graduation under Section 51225.3 shall be offered exclusively through independent study.

(f) The governing board of a school district or county office of education may meet the requirement to offer independent study for the 2021–22 school year described in subdivision (a) by contracting with a county office of education or by entering into an interdistrict transfer agreement with another school district pursuant to Section 46600.

(g) The requirement to offer independent study for the 2021–22 school year described in subdivision (a) may be waived for school districts by the county superintendent of schools in the county in which the school district is located and waived for county offices of education and school districts in single-district counties by the Superintendent if the school district or county office of education, as applicable, demonstrates both of the following:

- (1) Offering independent study would create an unreasonable fiscal burden on the school district or county office of education due to low numbers of pupils participating or other extenuating circumstances.
- (2) The governing board of the school district or county office of education does not have the option to enter into an interdistrict transfer agreement with another school district or to contract with a county office of education to provide an independent study option, as described in subdivision (f).

For purposes of this article the following definitions apply:

(a) “Live interaction” means interaction between the pupil and local educational agency classified or certificated staff, and may include peers, provided for the purpose of maintaining school connectedness, including, but not limited to, wellness checks, progress monitoring, provision of services, and instruction. This interaction may take place in person, or in the form of internet or telephonic communication.

(b) “Local educational agency” means a school district, county office of education, or charter school.

**Section 51745
Independent study
authorized; curriculum; restrictions**

Student with exceptional needs cannot participate unless IEP provides for independent study

**Section 51745.5
Definitions**

Section 51745.5

Definitions

(continued)

(c) "Pupil-parent-educator conference" means a meeting involving, at a minimum, all parties who signed the pupil's written independent study agreement pursuant to subdivision (g) of Section 51747 or the written learning agreement pursuant to subdivision (b) of Section 51749.6.

(d) "Synchronous instruction" means classroom-style instruction or designated small group or one-on-one instruction delivered in person, or in the form of internet or telephonic communications, and involving live two-way communication between the teacher and pupil. Synchronous instruction shall be provided by a teacher or teachers of record for that pupil pursuant to Section 51747.5 or the certificated employee of the local educational agency providing instruction for course-based independent study.

Section 51745.6

Ratio of independent study pupils to certificated employees responsible for independent study

(a)(1) The ratio of average daily attendance for independent study pupils 18 years of age or less to school district full-time equivalent certificated employees responsible for independent study, calculated as specified by the department, shall not exceed the equivalent ratio of average daily attendance to full-time equivalent certificated employees providing instruction in other educational programs operated by the school district, unless a new higher or lower average daily attendance ratio for all other educational programs offered is negotiated in a collective bargaining agreement or a memorandum of understanding is entered into that indicates an existing collective bargaining agreement contains an alternative average daily attendance ratio.

(2) The ratio of average daily attendance for independent study pupils 18 years of age or less to county office of education full-time equivalent certificated employees responsible for independent study, to be calculated in a manner prescribed by the department, shall not exceed the equivalent prior year ratio of average daily attendance to full-time equivalent certificated employees for all other educational programs operated by the high school or unified school district with the largest average daily attendance of pupils in that county or the collectively bargained alternative ratio used by that high school or unified school district in the prior year, unless a new higher or lower average daily attendance ratio for all other educational programs offered is negotiated in a collective bargaining agreement or a memorandum of understanding is entered into that indicates an existing collective bargaining agreement contains an alternative average daily attendance ratio. The computation of the ratios shall be performed annually by the reporting agency at the time of, and in connection with, the second principal apportionment report to the Superintendent.

(b) Only those units of average daily attendance for independent study that reflect a pupil-teacher ratio that does not exceed the ratios described in subdivision (a) shall be eligible for apportionment pursuant to Section 2575, for county offices of education, and Section 42238.05, for school districts. This section does not prevent a school district or county office of education from serving additional units of average daily attendance greater than the ratios described in subdivision (a), except that those additional units shall not be funded pursuant to Section 2575 or 42238.05, as applicable. If a school district, charter school, or county office of education has a memorandum of understanding to provide instruction in coordination with the school district, charter school, or county office of education at which a pupil is enrolled, the ratios that shall apply for purposes of this paragraph are the ratios for the local educational agency providing the independent study program to the pupil pursuant to Section 51749.5.

(c) The calculations performed for purposes of this section shall not include either of the following:

(1) The average daily attendance generated by special education pupils enrolled in special day classes on a full-time basis, or the teachers of those classes.

(2) The average daily attendance or teachers in necessary small schools that are eligible to receive funding pursuant to Article 4 (commencing with Section 42280) of Chapter 7 of Part 24 of Division 3.

(d) The applicable average-daily-attendance-to-certificated-employee ratios described in subdivision (a) may, in a charter school, be calculated by using a fixed average-daily-attendance-to-certificated-employee ratio of 25 to 1, or by using a ratio of less than 25 pupils per certificated employee. A new higher or lower ratio for all other educational programs offered by a charter school may be negotiated in a collective bargaining agreement, or a memorandum of understanding indicating that an existing collective bargaining agreement contains an alternative average daily attendance ratio may be entered into by a charter school. All charter school pupils, regardless of age, shall be included in the applicable average-daily-attendance-to-certificated-employee ratio calculations.

(e) Commencing with the 2021–22 fiscal year Guide for Annual Audits of K–12 Local Education Agencies and State Compliance Reporting, the Controller shall incorporate verification of the ratios included in this section, including fiscal penalties for noncompliance as described in this section.

25-1 ratio

Section 51746

Independent study policies and written agreement

It is the intent of the Legislature that school districts and county offices of education offering independent study shall provide appropriate existing services and resources to enable pupils to complete their independent study successfully and shall ensure the same access to all existing services and resources in the school in which the pupil is enrolled pursuant to Section 51748 as is

Section 51746
Independent study policies and written agreement
(continued)

available to all other pupils in the school. In addition, the services and resources may include, but need not be limited to, any of the following:

- (a) A designated learning center or study area staffed by appropriately trained personnel.
- (b) The services of qualified personnel to assess the achievement, abilities, interests, aptitudes, and needs of participating pupils to determine each of the following:
 - (1) Whether full-time independent study is the most appropriate placement for the pupil being referred.
 - (2) If the answer to paragraph (1) is affirmative, the determination of the most appropriate individualized plan and resources to be made available to pupils enrolled in full-time independent study.

A local educational agency shall not be eligible to receive apportionments for independent study by pupils, regardless of age, unless it has adopted written policies, and has implemented those policies, pursuant to rules and regulations adopted by the Superintendent, that include, but are not limited to, all of the following:

- (a) The maximum length of time, by grade level and type of program, that may elapse between the time an independent study assignment is made and the date by which the pupil must complete the assigned work.
- (b) (1) The level of satisfactory educational progress and the number of missed assignments that will be allowed before an evaluation is conducted to determine whether it is in the best interests of the pupil to remain in independent study, or whether the pupil should return to the regular school program. A written record of the findings of any evaluation made pursuant to this subdivision shall be treated as a mandatory interim pupil record. The record shall be maintained for a period of three years from the date of the evaluation and, if the pupil transfers to another California public school, the record shall be forwarded to that school.
 - (2) Satisfactory educational progress shall be determined based on all of the following indicators:
 - (A) The pupil's achievement and engagement in the independent study program, as indicated by the pupil's performance on applicable pupil-level measures of pupil achievement and pupil engagement set forth in paragraphs (4) and (5) of subdivision (d) of Section 52060.
 - (B) The completion of assignments, assessments, or other indicators that evidence that the pupil is working on assignments.
 - (C) Learning required concepts, as determined by the supervising teacher.
 - (D) Progressing toward successful completion of the course of study or individual course, as determined by the supervising teacher.
- (c) The provision of content aligned to grade level standards that is substantially equivalent to in-person instruction. For high schools, this shall include access to all courses offered by the local educational agency for graduation and approved by the University of California or the California State University as creditable under the A–G admissions criteria.
- (d) Procedures for tiered reengagement strategies for all pupils who are not generating attendance for more 10 percent of required minimum instructional time over four continuous weeks of a local educational agency's approved instructional calendar, pupils found not participatory in synchronous instructional offerings pursuant to Section 51747.5 for more than 50 percent of the scheduled times of synchronous instruction in a school month as applicable by grade span, or pupils who are in violation of the written agreement pursuant to subdivision (g). These procedures shall include local programs intended to address chronic absenteeism, as applicable, with at least all of the following:
 - (1) Verification of current contact information for each enrolled pupil.
 - (2) Notification to parents or guardians of lack of participation within one school day of the recording of a nonattendance day or lack of participation.
 - (3) A plan for outreach from the school to determine pupil needs, including connection with health and social services as necessary.
 - (4) A clear standard for requiring a pupil-parent-educator conference to review a pupil's written agreement, and reconsider the independent study program's impact on the pupil's achievement and well-being, consistent with the policies adopted pursuant to paragraph (4) of subdivision (g).
- (e) (1) For pupils in transitional kindergarten and grades 1 to 3, inclusive, a plan to provide opportunities for daily synchronous instruction for all pupils throughout the school year.
 - (2) For pupils in grades 4 to 8, inclusive, a plan to provide opportunities for both daily live interaction and at least weekly synchronous instruction for all pupils throughout the school year.
 - (3) For pupils in grades 9 to 12, inclusive, a plan to provide opportunities for at least weekly synchronous instruction for all pupils throughout the school year.
- (f) A plan to transition pupils whose families wish to return to in-person instruction from independent study expeditiously, and, in no case, later than five instructional days.
- (g) A requirement that a current written agreement for each independent study pupil shall be maintained on file, including, but not limited to, all of the following:
 - (1) The manner, time, frequency, and place for submitting a pupil's assignments, for reporting the pupil's academic progress, and for communicating with a pupil's parent or guardian regarding a pupil's academic progress.

Section 51747
Independent study policies and written agreement

Maximum duration for independent study assignment

Independent study evaluation

Indicators for satisfactory educational progress

Reengagement procedures

Synchronous instruction and daily live interaction

Written agreements required

Section 51747
Independent study policies and
written agreement

(continued)

(2) The objectives and methods of study for the pupil's work, and the methods used to evaluate that work.

(3) The specific resources, including materials and personnel, that will be made available to the pupil. These resources shall include confirming or providing access to all pupils to the connectivity and devices adequate to participate in the educational program and complete assigned work.

(4) A statement of the policies adopted pursuant to subdivisions (a) and (b) regarding the maximum length of time allowed between the assignment and the completion of a pupil's assigned work, the level of satisfactory educational progress, and the number of missed assignments allowed before an evaluation of whether or not the pupil should be allowed to continue in independent study.

(5) The duration of the independent study agreement, including the beginning and ending dates for the pupil's participation in independent study under the agreement. No independent study agreement shall be valid for any period longer than one school year.

(6) A statement of the number of course credits or, for the elementary grades, other measures of academic accomplishment appropriate to the agreement, to be earned by the pupil upon completion.

(7) A statement detailing the academic and other supports that will be provided to address the needs of pupils who are not performing at grade level, or need support in other areas, such as English learners, individuals with exceptional needs in order to be consistent with the pupil's individualized education program or plan pursuant to Section 504 of the federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794), pupils in foster care or experiencing homelessness, and pupils requiring mental health supports.

(8) The inclusion of a statement in each independent study agreement that independent study is an optional educational alternative in which no pupil may be required to participate. In the case of a pupil who is referred or assigned to any school, class, or program pursuant to Section 48915 or 48917, the agreement also shall include the statement that instruction may be provided to the pupil through independent study only if the pupil is offered the alternative of classroom instruction.

Signature requirements (after fiscal year 2021-22)

(9) (A) For a pupil participating in an independent study program that is scheduled for more than 14 school days, each written agreement shall be signed, before the commencement of independent study, by the pupil, the pupil's parent, legal guardian, or caregiver, if the pupil is less than 18 years of age, the certificated employee who has been designated as having responsibility for the general supervision of independent study, and the certificated employee designated as having responsibility for the special education programming of the pupil, as applicable. Beginning in the 2022-23 school year, for a pupil participating in an independent study program that is scheduled for less than 15 school days, each written agreement shall be signed within 10 school days of the commencement of the first day of the pupil's enrollment in independent study, by the pupil, the pupil's parent, legal guardian, or caregiver, if the pupil is less than 18 years of age, the certificated employee who has been designated as having responsibility for the general supervision of independent study, and the certificated employee designated as having responsibility for the special education programming of the pupil, as applicable. For purposes of this paragraph "caregiver" means a person who has met the requirements of Part 1.5 (commencing with Section 6550) of Division 11 of the Family Code.

(B) Signed written agreements, supplemental agreements, assignment records, work samples, and attendance records assessing time value of work or evidence that an instructional activity occurred may be maintained as an electronic file.

(C) For purposes of this section, an electronic file includes a computer or electronic stored image of an original document, including, but not limited to, portable document format (PDF), JPEG, or other digital image file type, that may be sent via fax machine, email, or other electronic means.

(D) Either an original document or an electronic file of the original document is allowable documentation for auditing purposes.

(E) Written agreements may be signed using an electronic signature that complies with state and federal standards, as determined by the department, that may be a marking that is either computer generated or produced by electronic means and is intended by the signatory to have the same effect as a handwritten signature. The use of an electronic signature shall have the same force and effect as the use of a manual signature if the requirements for digital signatures and their acceptable technology, as provided in Section 16.5 of the Government Code and in Chapter 10 (commencing with Section 22000) of Division 7 of Title 2 of the California Code of Regulations, are satisfied.

Signature requirements (fiscal year 2021-22 school year only)

(F) Notwithstanding subparagraph (A), for the 2021-22 school year only, a local educational agency shall obtain a signed written agreement for an independent study program of any length of time from the pupil, or the pupil's parent or legal guardian if the pupil is less than 18 years of age, the certificated employee who has been designated as having responsibility for the general supervision of independent study, and the certificated employee designated as having responsibility for the special education programming of the pupil, as applicable, no later than 30 days after the first day of instruction in an independent study program or October 15,

whichever date comes later. This subparagraph does not relieve a local educational agency from the obligation to comply with the requirements of this article, as amended by the act adding this subparagraph, upon commencement of instruction for a participating pupil in the 2021–22 school year.

(h) (1) For the 2021–22 school year only, school districts and county offices of education shall notify the parents and guardians of all enrolled pupils of their options to enroll their child in in-person instruction or independent study during the 2021–22 school year. This notice shall include written information on the local educational agency's internet website, including, but not limited to, the right to request a pupil-parent-educator conference meeting before enrollment pursuant to this section, pupil rights regarding procedures for enrolling, disenrolling, and reenrolling in independent study, and the synchronous and asynchronous instructional time that a pupil will have access to as part of independent study. If 15 percent or more of the pupils enrolled in a local educational agency that provides instruction in transitional kindergarten, kindergarten, or any of grades 1 to 12, inclusive, speak a single primary language other than English, as determined from the census data submitted to the department pursuant to Section 52164 in the preceding year, the written information shall, in addition to being written in English, be written in the primary language.

(2) Before signing a written agreement pursuant to this section, the parent or guardian of a pupil may request that the local educational agency conduct a telephone, videoconference, or in-person pupil-parent-educator conference or other school meeting during which the pupil, parent or guardian, and, if requested by the pupil or parent, an education advocate, may ask questions about the educational options, including which curriculum offerings and nonacademic supports will be available to the pupil in independent study, before making the decision about enrollment or disenrollment in the various options for learning.

(i) Subdivisions (d), (e), and (f) shall not apply to pupils that participate in an independent study program for fewer than 15 schooldays in a school year and pupils enrolled in a comprehensive school for classroom-based instruction who, under the care of appropriately licensed professionals, participate in independent study due to necessary medical treatments or inpatient treatment for mental health care or substance abuse. Local educational agencies shall obtain evidence from appropriately licensed professionals of the need for pupils to participate in independent study pursuant to this subdivision.

(j) (1) Notwithstanding paragraph (8) of subdivision (g) of this section, paragraph (1) of subdivision (e) of Section 46300, and subdivision (d) of Section 51745, for the 2021–22 school year only, a local educational agency shall be eligible to receive apportionments for independent study for pupils that are subject to quarantine for exposure to, or infection with, COVID-19 pursuant to local or state health guidance, and the pupil cannot participate in classroom-based instruction due to the quarantine, and for school closures due to COVID-19 pursuant to subdivision (c) of Section 41422. Local educational agencies shall receive apportionment for these pupils for all schooldays that they participate in and meet all other apportionment requirements of independent study while in quarantine or during a school closure.

(2) Notwithstanding Section 47612.5, for the 2021–22 fiscal year, a classroom-based charter school that provides an independent study program pursuant to this article for pupils that are subject to quarantine for exposure to, or infection with, COVID-19 pursuant to local or state health guidance, and the pupil cannot participate in classroom-based instruction due to the quarantine, shall not attribute quarantine-based independent study average daily attendance required pursuant to law for a nonclassroom-based charter school pursuant to Section 47612.5 and shall not be required to submit a request for a funding determination as a result of providing independent study to quarantined pupils.

(3) This subdivision shall apply only to pupils participating in independent study due to quarantine who do not have the option of in-person instruction, and only for the period of quarantine mandated pursuant to state or local health guidance or order. This subdivision shall not apply to classroom-based charter schools offering independent study to pupils whose parents or guardians have requested independent study pursuant to subdivision (a) of Section 51745.

(k) Commencing with the 2021–22 fiscal year Guide for Annual Audits of K–12 Local Education Agencies and State Compliance Reporting, the Controller shall incorporate verification of the adoption of the policies required pursuant to this section, including loss of apportionment for independent study for local educational agencies found to be noncompliant, unless compliance verification for those policies is already included in the audit guide.

(l) The provisions of this section are not subject to waiver by the state board, by the Superintendent, or under any provision of Part 26.8 (commencing with Section 47600).

(a) Notwithstanding any other law, a local educational agency, including, but not limited to, a charter school, may not claim state funding for the independent study of a pupil, whether characterized as home study or otherwise, if the local educational agency has provided any funds or other thing of value to the pupil or the pupil's parent or guardian that the local educational agency does not provide to pupils who attend regular classes or to their parents or guardians.

Section 51747.3
No apportionment when
“things of value” provided

Section 51747.3
No apportionment when
“things of value” provided
(continued)

Access to connectivity and devices

A charter school may not claim state funding for the independent study of a pupil, whether characterized as home study or otherwise, if the charter school has provided any funds or other thing of value to the pupil or the pupil’s parent or guardian that a school district could not legally provide to a similarly situated pupil of the school district, or to the pupil’s parent or guardian.

(b) Providing access to connectivity and local educational agency-owned devices adequate to participate in an independent study program and complete assigned work, consistent with paragraph (3) of subdivision (g) of Section 51747, or to participate in an independent study course, as authorized in Section 51749.5, shall not be considered funds or other things of value for purposes of subdivision (a).

Residency requirement for apportionment

(c) Notwithstanding paragraph (1) of subdivision (e) of Section 47605 or any other law, community school and independent study average daily attendance shall be claimed by school districts, county superintendents of schools, and charter schools only for pupils who are residents of the county in which the apportionment claim is reported, or who are residents of a county immediately adjacent to the county in which the apportionment claim is reported.

(d) The Superintendent shall not apportion funds for reported average daily attendance, through full-time independent study, of pupils who are enrolled in school pursuant to subdivision (b) of Section 48204.

(e) In conformity with Provisions 25 and 28 of Item 6110–101–001 of Section 2.00 of the Budget Act of 1992, this section applies to average daily attendance reported for apportionment purposes beginning July 1, 1992.

(f) The provisions of this section are not subject to waiver by the state board, by the Superintendent, or under any provision of Part 26.8 (commencing with Section 47600).

Section 51747.5
Coordination, evaluation and
supervision of independent study;
apportionment credit

(a) The independent study by each pupil shall be coordinated, evaluated, and, notwithstanding subdivision (a) of Section 46300, shall be under the general supervision of an employee of the local educational agency who possesses a valid certification document pursuant to Section 44865 or an emergency credential pursuant to Section 44300, registered as required by law.

(b) (1) A local educational agency may claim apportionment credit for independent study only to the extent of the time value of pupil work products, as personally judged in each instance by a certificated teacher employed by the local educational agency, or the combined time value of pupil work product and pupil participation in synchronous instruction pursuant to paragraph (2). It is the intent of the Legislature that teachers be given access to digital assignment tracking systems to reduce workload associated with evaluating and accounting for pupil work and synchronous instruction participation.

(2) For purposes of computing average daily attendance for each pupil enrolled in independent study pursuant to Section 51747, the following computations shall apply:

(A) For each schoolday, add the combined equivalent daily time value of pupil work products, as personally judged by a certificated employee of the local educational agency.

(B) (i) For each schoolday, add the combined daily instructional minutes a pupil participated in synchronous instruction, as defined by subdivision (d) of Section 51745.5 and offered pursuant to subdivision (e) of Section 51747, for which evidence of pupil participation is furnished and maintained. Evidence of pupil participation may include, but is not limited to, pupil work produced or performed, as verified by a certificated employee and maintained by the local educational agency for each hour or fraction thereof of the synchronous instructional offering.

(ii) Pursuant to paragraph (1), a local educational agency may claim apportionment credit in this paragraph insofar as a pupil’s participation in a synchronous instructional offering augments the time value of pupil work product.

(C) For each schoolday, add the sum of subparagraphs (A) and (B).

(3) The average daily attendance computed pursuant to this subdivision shall not result in more than one unit of average daily attendance per pupil.

(4) Notwithstanding any other law, average daily attendance computed for pupils enrolled in independent study shall not be credited with average daily attendance other than what is specified in this section.

Document participation in live interaction and synchronous instruction

(c) A local educational agency shall document each pupil’s participation in live interaction and synchronous instruction pursuant to Section 51747 on each schoolday, as applicable, in whole or in part, for which live interaction or synchronous instruction is provided as part of the independent study program. A pupil who does not participate in scheduled live interaction or synchronous instruction shall be documented as nonparticipatory for that schoolday for purposes of pupil participation reporting and tiered reengagement pursuant to Section 51747.

(d) A local educational agency shall maintain written or computer-based evidence of pupil engagement that includes, but is not limited to, a grade book or summary document that, for each class, lists all assignments, assessments, and associated grades.

(e) For purposes of this section, a local educational agency shall not be required to sign and date pupil work products when assessing the time value of pupil work products for apportionment purposes.

(f) Commencing with the 2021–22 fiscal year Guide for Annual Audits of K–12 Local Education

Agencies and State Compliance Reporting, the Controller shall incorporate compliance reviews for subdivisions (a) to (d), inclusive, unless compliance verification for those subdivisions is already included in the audit guide. Findings of noncompliance shall result in the loss of apportionment equal to the average daily attendance impacted by the noncompliance.

(g) The provisions of this section are not subject to waiver by the state board, by the Superintendent, or under any provision of Part 26.8 (commencing with Section 47600).

School districts and county offices of education shall not be eligible to receive apportionment for independent study attendance by any pupil who is not otherwise identified in the written records of the district or county board by grade level, program placement, and the school in which he or she is enrolled.

(a) The Superintendent, upon the next revision of the California Basic Educational Data System, or its equivalent, following July 1, 1990, shall include all data collection elements necessary to compile an annual statewide profile of pupils participating in independent study, including data on the number and percentage of pupils pursuing their coursework through independent study who successfully complete the requirements for a high school diploma.

(b) Commencing with the 2021–22 school year, the department shall include a required field in the California Longitudinal Pupil Achievement Data System for the collection of the number of pupils participating in independent study pursuant to this article for 15 or more schooldays.

The Superintendent of Public Instruction shall establish rules and regulations for the purposes of implementing this article.

(a) Notwithstanding any other law, and commencing with the 2015–16 school year, a local educational agency may, for pupils enrolled in kindergarten and grades 1 to 12, inclusive, provide independent study courses pursuant to the following conditions:

(1) The governing board or body of the local educational agency adopts policies, at a public meeting, that comply with the requirements of this section and any applicable regulations adopted by the state board.

(2) A signed learning agreement is completed and on file pursuant to Section 51749.6.

(3) Courses are taught under the general supervision of certificated employees who hold the appropriate subject matter credential pursuant to Section 44300 or 44865, or subdivision (l) of Section 47605, and are employed by the local educational agency at which the pupil is enrolled, or by a local educational agency that has a memorandum of understanding to provide the instruction in coordination with the local educational agency at which the pupil is enrolled.

(4) (A) Courses are annually certified, by local educational agency governing board or body resolution, to be of the same rigor, educational quality, and intellectual challenge substantially equivalent to in-person instruction and equivalent classroom-based courses, and shall be aligned to all relevant local and state content standards. For high schools, this shall include access to all courses offered by the local educational agency for graduation and approved by the University of California or the California State University as creditable under the A-G admissions criteria.

(B) This certification shall, at a minimum, include the duration, number of equivalent daily instructional minutes for each schoolday that a pupil is enrolled, number of equivalent total instructional minutes, number of course credits for each course, and a plan as described in subparagraph (C). This information shall be consistent with that of equivalent classroom-based courses.

(C) (i) For pupils in transitional kindergarten and grades 1 to 3, inclusive, a plan to provide opportunities for daily synchronous instruction for all pupils throughout the school year.

(ii) For pupils in grades 4 to 8, inclusive, a plan to provide opportunities for both daily live interaction and at least weekly synchronous instruction for all pupils throughout the school year.

(iii) For pupils in grades 9 to 12, inclusive, a plan to provide opportunities for at least weekly synchronous instruction for all pupils throughout the school year.

(5) Pupils enrolled in courses authorized by this section shall meet the applicable age requirements established pursuant to Sections 46300.1, 46300.4, 47612, and 47612.1.

(6) Pupils enrolled in courses authorized by this section shall meet the applicable residency and enrollment requirements established pursuant to Sections 46300.2, 47612, 48204, and 51747.3.

(7) (A) An individual with exceptional needs, as defined in Section 56026, may participate in course-based independent study, if the pupil's individualized education program developed pursuant to Article 3 (commencing with Section 56340) of Chapter 4 of Part 30 specifically provides for that participation.

(B) A temporarily disabled pupil shall not receive individual instruction pursuant to Section 48206.3 through course-based independent study.

(8) (A) Satisfactory educational progress shall be determined based on all of the following indicators:

Section 51747.5
Coordination, evaluation and supervision of independent study; apportionment credit
(continued)

Section 51748
Written records for apportionment

Section 51749
Statewide profile of independent study pupils

Section 51749.3
Rules and regulations

Section 51749.5
Independent study courses

Section 51749.5
Independent study courses

(continued)

(i) The pupil's achievement and engagement in the independent study program, as indicated by the pupil's performance on applicable pupil-level measures of pupil achievement and pupil engagement set forth in paragraphs (4) and (5) of subdivision (d) of Section 52060.

(ii) The completion of assignments, assessments, or other indicators that evidence that the pupil is working on assignments.

(iii) Learning required concepts, as determined by the supervising teacher.

(iv) Progressing toward successful completion of the course of study or individual course, as determined by the supervising teacher.

(B) If satisfactory educational progress in one or more courses is not being made, certificated employees providing instruction shall notify the pupil and, if the pupil is less than 18 years of age, the pupil's parent or legal guardian, and conduct an evaluation to determine whether it is in the best interest of the pupil to remain in the course or whether the pupil should be referred to an alternative program, which may include, but is not limited to, a regular school program. A written record of the findings of an evaluation made pursuant to this subdivision shall be treated as a mandatory interim pupil record. The record shall be maintained for a period of three years from the date of the evaluation and, if the pupil transfers to another California public school, the record shall be forwarded to that school.

(C) Procedures for tiered reengagement strategies for all pupils who are not making satisfactory educational progress in one or more courses, or who are in violation of the written learning agreement pursuant to Section 51749.6. These procedures shall include, but are not necessarily limited to, all of the following:

(i) Verification of current contact information for each enrolled pupil.

(ii) A plan for outreach from the school to determine pupil needs, including connection with health and social services as necessary.

(iii) A clear standard for requiring a pupil-parent-educator conference to review a pupil's written learning agreement, and reconsider the independent study course's impact on the pupil's achievement and well-being.

(D) Written or computer-based evidence of satisfactory educational progress, as described in subparagraph (A), shall be retained for each course and pupil. At a minimum, this evidence shall include a grade book or summary document that, for each course, lists all assignments, examinations, and associated grades.

(9) A plan to transition pupils whose families wish to return to in-person instruction from course-based independent study expeditiously, and, in no case, later than five instructional days.

(10) A proctor shall administer examinations.

(11) (A) Statewide testing results for pupils enrolled in any course authorized pursuant to this section shall be reported and assigned to the school or charter school at which the pupil is enrolled, and to any school district, charter school, or county office of education within which that school's or charter school's testing results are aggregated.

(B) Statewide testing results for pupils enrolled in a course or courses pursuant to this section shall be disaggregated for purposes of comparing the testing results of those pupils to the testing results of pupils enrolled in classroom-based courses.

(12) A pupil shall not be required to enroll in courses authorized by this section.

(13) The pupil-to-certificated-employee ratio limitations established pursuant to Section 51745.6 are applicable to courses authorized by this section.

(14) For each pupil, the combined equivalent daily instructional minutes for enrolled courses authorized by this section and enrolled courses authorized by all other laws and regulations shall meet the minimum instructional day requirements applicable to the local educational agency. Pupils enrolled in courses authorized by this section shall be offered the minimum annual total equivalent instructional minutes pursuant to Sections 46200 to 46208, inclusive, and Section 47612.5.

(15) Courses required for high school graduation or for admission to the University of California or California State University shall not be offered exclusively through independent study.

(16) A pupil participating in independent study shall not be assessed a fee prohibited by Section 49011.

(17) A pupil shall not be prohibited from participating in independent study solely on the basis that the pupil does not have the materials, equipment, or internet access that are necessary to participate in the independent study course.

(b) Subparagraph (C) of paragraph (4) of, subparagraph (C) of paragraph (8) of, and paragraph (9) of, subdivision (a) shall not apply to pupils that participate in an independent study program for fewer than 15 schooldays in a school year or to pupils enrolled in a comprehensive school for classroom-based instruction who, under the care of appropriately licensed professionals, participate in independent study due to necessary medical treatments or inpatient treatment for mental health care or substance abuse. Local educational agencies shall obtain evidence from appropriately licensed professionals of the need for pupils to participate in independent study pursuant to this subdivision.

(c) For purposes of computing average daily attendance for each pupil enrolled in one or more courses authorized by this section, the following computations shall apply:

Section 51749.5
Independent study courses
(continued)

(1) (A) For each schoolday, add the combined equivalent daily instructional minutes, as certified in paragraph (4) of subdivision (a), for courses authorized by this section in which the pupil is enrolled.

(B) For each schoolday, add the combined daily instructional minutes of courses authorized by all other laws and regulations in which the pupil is enrolled and for which the pupil meets applicable attendance requirements.

(C) For each schoolday, add the sum of subparagraphs (A) and (B).

(2) If subparagraph (C) of paragraph (1) meets applicable minimum schoolday requirements for each schoolday, and all other requirements in this section have been met, credit each schoolday that the pupil is demonstrating satisfactory educational progress pursuant to the requirements of this section, with up to one schoolday of attendance.

(3) (A) Using credited schoolday attendance pursuant to paragraph (2), calculate average daily attendance pursuant to Section 41601 or 47612, whichever is applicable, for each pupil.

(B) The average daily attendance computed pursuant to this subdivision shall not result in more than one unit of average daily attendance per pupil.

(4) Notwithstanding any other law, average daily attendance computed for pupils enrolled in courses authorized by this section shall not be credited with average daily attendance other than what is specified in this section.

(5) If more than 10 percent of the total average daily attendance of a local educational agency is claimed pursuant to this section, then the amount of average daily attendance for all pupils enrolled by that school district, charter school, or county office of education in courses authorized pursuant to this section that is in excess of 10 percent of the total average daily attendance for the local educational agency shall be reduced by either (A) the statewide average rate of absence for elementary school districts for kindergarten and grades 1 to 8, inclusive, or (B) the statewide average rate of absence for high school districts for grades 9 to 12, inclusive, as applicable, as calculated by the department for the prior fiscal year, with the resultant figures and ranges rounded to the nearest 10th.

(d) For purposes of this section, "equivalent total instructional minutes" means the same number of minutes as required for an equivalent classroom-based course.

(e) This section does not prohibit the right to collectively bargain any subject within the scope of representation pursuant to Section 3543.2 of the Government Code.

(f) (1) The Superintendent shall conduct an evaluation of independent study courses offered pursuant to this section and report the findings to the Legislature and the Director of Finance no later than September 1, 2019. The report shall, at a minimum, compare the academic performance of pupils in independent study with demographically similar pupils enrolled in equivalent classroom-based courses.

(2) The requirement for submitting a report imposed under paragraph (1) is inoperative on September 1, 2023, pursuant to Section 10231.5 of the Government Code.

(3) A report to be submitted pursuant to paragraph (1) shall be submitted in compliance with Section 9795 of the Government Code.

(g) (1) Commencing with the 2021–22 fiscal year Guide for Annual Audits of K–12 Local Education Agencies and State Compliance Reporting, the Controller shall incorporate verification of the ratios included in this section, including fiscal penalties for noncompliance as described in this section.

(2) Commencing with the 2021–22 fiscal year Guide for Annual Audits of K–12 Local Education Agencies and State Compliance Reporting, the Controller shall incorporate compliance reviews for subdivisions (a) to (f), inclusive, unless compliance verification for those subdivisions is already included in the audit guide. Findings of noncompliance shall result in the loss of apportionment equal to the average daily attendance impacted by the noncompliance.

(h) The provisions of this section are not subject to waiver by the state board, by the Superintendent, or under any provision of Part 26.8 (commencing with Section 47600).

(a) Before enrolling a pupil in a course authorized by Section 51749.5, each local educational agency shall provide the pupil and, if the pupil is less than 18 years of age, the pupil's parent or legal guardian, with a written learning agreement that includes all of the following:

(1) A summary of the policies and procedures adopted by the governing board or body of the local educational agency pursuant to Section 51749.5, as applicable.

(2) The duration of the enrolled course or courses, the duration of the learning agreement, and the number of course credits for each enrolled course consistent with the certifications adopted by the governing board or body of the local educational agency pursuant to Section 51749.5. The duration of a learning agreement shall not exceed a school year or span multiple school years.

(3) The learning objectives and expectations for each course, including, but not limited to, a description of how satisfactory educational progress is measured and when a pupil evaluation is required to determine whether the pupil should remain in the course or be referred to an alternative program, which may include, but is not limited to, a regular school program.

(4) The specific resources, including materials and personnel, that will be made available to the pupil. These resources shall include confirming or providing access to all pupils to the connectivity

Section 51749.6
Written learning agreement

Section 51749.6
Written learning agreement
(continued)

- and devices adequate to participate in the educational program and complete assigned work.
- (5) A statement detailing the academic and other supports that will be provided to address the needs of pupils who are not performing at grade level, or need support in other areas, such as English learners, individuals with exceptional needs in order to be consistent with the pupil's individualized education program or plan pursuant to Section 504 of the federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794), pupils in foster care or experiencing homelessness, and pupils requiring mental health supports.
- (6) A statement that enrollment in a course authorized pursuant to Section 51749.5 is an optional educational alternative in which no pupil may be required to participate. In the case of a pupil who is referred or assigned to any school, class, or program pursuant to Section 48915 or 48917, the agreement also shall include the statement that instruction may be provided to the pupil through course-based independent study only if the pupil is offered the alternative of classroom instruction.
- (7) The manner, time, frequency, and place for submitting a pupil's assignments, for reporting the pupil's academic progress, and for communicating with a pupil's parent or guardian regarding a pupil's academic progress.
- (8) The objectives and methods of study for the pupil's work, and the methods used to evaluate that work.
- (9) A statement of the adopted policies regarding the maximum length of time allowed between the assignment and the completion of a pupil's assigned work, the level of satisfactory educational progress, and the number of missed assignments allowed before an evaluation of whether or not the pupil should be allowed to continue in course-based independent study.
- (10) A statement of the number of course credits or, for the elementary grades, other measures of academic accomplishment appropriate to the learning agreement, to be earned by the pupil upon completion.
- (b) (1) For independent study programs projected to last more than 14 schooldays for an individual pupil, the learning agreement shall be signed, before the commencement of an independent study course, by the pupil, the pupil's parent, legal guardian, or caregiver, if the pupil is less than 18 years of age, the certificated employee who has been designated as having responsibility for the general supervision of the independent study course, and the certificated employee designated as having responsibility for the special education programming of the pupil, as applicable. Beginning in the 2022–23 school year, for independent study programs projected to last less than 15 schooldays for an individual pupil, each learning agreement shall be signed within 10 schooldays of the commencement of independent study, by the pupil, the pupil's parent, legal guardian, or caregiver, if the pupil is less than 18 years of age, the certificated employee who has been designated as having responsibility for the general supervision of independent study, and the certificated employee designated as having responsibility for the special education programming of the pupil, as applicable. For purposes of this paragraph "caregiver" means a person who has met the requirements of Part 1.5 (commencing with Section 6550) of Division 11 of the Family Code.
- (2) The signed learning agreement constitutes permission from a pupil's parent or legal guardian, if the pupil is less than 18 years of age, for the pupil to receive instruction through course-based independent study.
- (3) Either an original document or an electronic file of the original document is allowable documentation for auditing purposes.
- (4) For purposes of this section, an electronic file includes a computer or electronic stored image of an original document, including, but not limited to, portable document format (PDF), JPEG, or other digital image file type, that may be sent via fax machine, email, or other electronic means.
- (5) Signed written agreements, supplemental agreements, assignment records, work samples, and attendance records assessing time value of work or evidence that an instructional activity occurred may be maintained as an electronic file.
- (6) Written agreements may be signed using an electronic signature that complies with state and federal standards, as determined by the department, that may be a marking that is either computer generated or produced by electronic means and is intended by the signatory to have the same effect as a handwritten signature. The use of an electronic signature shall have the same force and effect as the use of a manual signature if the requirements for digital signatures and their acceptable technology, as provided in Section 16.5 of the Government Code and in Chapter 10 (commencing with Section 22000) of Division 7 of Title 2 of the California Code of Regulations, are satisfied.
- (7) Notwithstanding paragraph (1), for the 2021–22 school year only, a local educational agency shall obtain a signed written agreement for independent study from the pupil, or the pupil's parent or legal guardian if the pupil is less than 18 years of age, the certificated employee who has been designated as having responsibility for the general supervision of the independent study course, and the certificated employee designated as having responsibility for the special education programming of the pupil, as applicable, no later than 30 days after the first day of instruction. This subparagraph does not relieve a local educational agency from the obligation to comply with the requirements of this article, as amended by the act adding this paragraph, upon commencement of instruction for a participating pupil in the 2021–22 school year.

8) (A) For the 2021–22 school year only, school districts and county offices of education shall notify the parents and guardians of all enrolled pupils of their options to enroll their child in in-person instruction or independent study during the 2021–22 school year. This notice shall include written information on the local educational agency’s internet website, including, but not limited to, the right to request a pupil-parent-educator conference meeting before enrollment pursuant to this section, pupil rights regarding procedures for enrolling, disenrolling, and reenrolling in independent study, and the synchronous and asynchronous instructional time that a pupil will have access to as part of independent study. If 15 percent or more of the pupils enrolled in a local educational agency that provides instruction in transitional kindergarten, kindergarten, or any of grades 1 to 12, inclusive, speak a single primary language other than English, as determined from the census data submitted to the department pursuant to Section 52164 in the preceding year, the written information shall, in addition to being written in English, be written in the primary language.

(B) Upon the request of the parent or guardian of a pupil, and before signing a written agreement pursuant to this section, the local educational agency shall conduct a telephone, videoconference, or in-person pupil-parent-educator conference or other school meeting during which the pupil, parent or guardian, and, if requested by the pupil or parent, an education advocate, may ask questions about the educational options, including which curriculum offerings and nonacademic supports will be available to the pupil in independent study, before making the decision about enrollment or disenrollment in the various options for learning.

(c) Notwithstanding paragraph (6) of subdivision (a) of this section, paragraph (1) of subdivision (e) of Section 46300, and subparagraph (B) of paragraph (7) of subdivision (a) of Section 51749.5 for the 2021–22 school year only, a local educational agency shall be eligible to receive apportionments for independent study for pupils that are subject to quarantine for exposure to, or infection with, COVID-19 pursuant to local or state health guidance, and the pupil cannot participate in classroom-based instruction due to the quarantine, and for school closures due to COVID-19 pursuant to subdivision (c) of Section 41422. Local educational agencies shall receive apportionment for these pupils for all schooldays that they participate in and meet all other apportionment requirements of independent study while in quarantine or during a school closure.

(d) Commencing with the 2021–22 fiscal year Guide for Annual Audits of K–12 Local Education Agencies and State Compliance Reporting, the Controller shall incorporate compliance reviews for subdivisions (a) and (b) unless compliance verification for those subdivisions is already included in the audit guide. Findings of noncompliance shall result in the loss of apportionment equal to the average daily attendance impacted by the noncompliance.

(e) The provisions of this section are not subject to waiver by the state board, by the Superintendent, or under any provision of Part 26.8 (commencing with Section 47600).

INDEPENDENT STUDY

Sections 109 and 110 of AB 181 (Ch. 52, Statutes of 2022)

The Legislature finds and declares that the amendments to Section 51745 of the Education Code, made by Section 73 of this act, are intended to clarify the legal requirements for local educational agencies for serving individuals with exceptional needs, as defined in Section 56026 of the Education Code, when offering independent study. The COVID-19 pandemic has caused significant disruption to many aspects of the state’s public education system and to the experience of pupils and families. The implementation of independent study programs under Assembly Bill 130 (Chapter 44 of the Statutes of 2021), to support the return to in-person learning in the 2021–22 school year, in particular at the start of the school year, highlighted several areas where additional clarity in the law would benefit local educational agencies, pupils, and families.

(a) A local educational agency may claim apportionment for a pupil who receives services from a nonpublic, nonsectarian school as defined in Section 56034 of the Education Code through a virtual program if all of the following conditions are met:

(1) The pupil is an individual with exceptional needs, as defined in Section 56026 of the Education Code, whose individualized education program includes a placement at a nonpublic, nonsectarian school pursuant to Sections 56365 and 56366 of the Education Code.

(2) The local educational agency offers independent study pursuant to paragraph (5) of subdivision (a) of Section 51745 of the Education Code.

(3) The pupil’s parent or guardian requests independent study pursuant to paragraph (5) of subdivision (a) of Section 51745 of the Education Code.

(4) The pupil’s individualized education program team determines that a free appropriate public education can be provided by a virtual program in the nonpublic, school placement.

(5) The virtual program provided by the nonpublic, nonsectarian school includes procedures for tiered reengagement strategies for all pupils who are not generating attendance for more than three schooldays or 60 percent of the instructional days in a school week, or 10 percent of required minimum instructional time over four continuous weeks of a local educational agency’s

Section 109 **Purpose of amendments** **to Section 51745**

Section 110 **Independent study for pupil** **with special needs at nonpublic,** **nonsectarian school**

Section 110
Independent study for pupil
with special needs at nonpublic,
nonsectarian school
(continued)

approved instructional calendar, or pupils who do not participate in scheduled live interaction or synchronous instruction for more than the greater of three schooldays or 60 percent of the scheduled days of synchronous instruction in a school month as applicable by grade span.

(b) A local educational agency may claim apportionment credit for a virtual program at a nonpublic, nonsectarian school as described in subdivision (a) only to the extent of the time value of pupil work products, as personally judged in each instance by a certificated teacher employed by the nonpublic, nonsectarian school.

(c) To ensure the authorization of services provided under this section does not undermine the entitlement of individuals with exceptional needs to a free appropriate public education, this section shall become inoperative on July 1, 2024, and on January 1, 2025, is repealed.

INDEPENDENT STUDY
California Code of Regulations, Title 5

Section 11700
Definitions

(a) "Full-time equivalent certificated employees" means any combination of full-time certificated employees and part-time certificated employee assignments that aggregate to the amount of instructional time specified in the contract of a full-time certificated classroom teacher of the district or county office of education.

(b) "General supervision" means the supervising teacher's

(1) continuing oversight of the study design, implementation plan, allocation of resources, and evaluation of pupil or adult education student progress for any pupil's or adult education student's independent study; and

(2) personal determination or personal review of the determination made by another certificated teacher of the time values for apportionment purposes of each pupil's or adult education student's work products.

(c) "Independent study" means an alternative to classroom instruction consistent with the district's course of study.

(d) "Independent study is an optional educational alternative in which no pupil may be required to participate" means

(1) with regard to school districts or county offices of education, that

(A) they are not required to offer independent study, and

(B) school districts or county offices of education that do offer independent study are not obliged to permit a pupil or adult education student to engage in independent study if school officials given responsibility for the decision determine that independent study is not an appropriate alternative for the pupil or adult education student; and,

(2) with regard to pupils or adult education students,

(A) a pupil's or an adult education student's choice to commence, or to continue in, independent study must not be coerced, and

(B) in the case of a pupil who is referred or assigned to any school, class, or program pursuant to Education Code sections 48915 or 48917, and to the extent that independent study is not prohibited, instruction may be provided to the pupil through independent study only if the pupil has the continuing option of classroom instruction.

(e) "Method utilized to evaluate" means any specified procedure through which a certificated teacher personally assesses the extent to which achievement of the pupil or adult education student meets the objectives of an assignment.

(f) "Methods of study" means the pupil or adult education student activities selected by the supervising teacher as the means to reach the educational objectives set forth in the written agreement.

(g) "Missed assignment" means any specified independent study assignment that has not been turned in, or evidenced as completed, by a pupil or adult education student by the due date for the assignment.

(h) "Regular school program" means the classroom-based instructional program or its equivalent that a pupil or adult education student would have attended had the pupil or adult education student not elected independent study.

(i) "Specific resources" include all resources, including materials and services, reasonably necessary to the achievement of the objectives in the written agreement, and shall not be construed to exclude resources normally available to all pupils or adult education students on the same terms as the terms on which they are normally available to all pupils or adult education students.

(j) "Supervising teacher" means the certificated teacher employed by the school district or county office of education and assigned, as noted in the written agreement, the responsibility for coordinating, evaluating, and providing general supervision of a pupil's or adult education student's independent study pursuant to Education Code section 51747.5(a).

(k) "Type of program" means statutory program category for purposes of attendance accounting.

(l) "Work product" means that which results from a pupil's or adult education student's efforts and actions to complete or perform the assignments given and which is subsequently evaluated by a certificated teacher.

(a) "Certificated employees," in charter schools, means employees meeting the requirements of subdivision (l) of Education Code Section 47605.

(b) "Classroom instruction," with reference to a charter school, means classroom instruction provided either by the charter school or by another public school that the pupil is eligible to attend.

(c) "School district" or "district," for the purposes of this subchapter and of Article 5.5 (commencing with Section 51745) of Chapter 5 of Part 28 of the Education Code, means a school district or a charter school, unless the context clearly indicates otherwise.

In setting policy pursuant to subdivisions (a) and (b) of Education Code section 51747, the local governing board shall consider, in a public hearing, the scope of its existing or prospective use of independent study as an instructional strategy, its purposes in authorizing independent study, and factors bearing specifically on the maximum realistic lengths of assignments and acceptable number of missed assignments for specific populations of pupils or adult education students. Adopted policies shall reflect an awareness that excessive leniency in their terms can result in pupils falling so far behind their age peers as to increase, rather than decrease, the risk of their dropping out of school.

Consistent with the statutory authorization to offer independent study as an alternative instructional strategy to meet the educational needs of pupils or adult education students,

(a) the independent study option is to be substantially equivalent in quality and in quantity to classroom instruction, thereby ensuring that a pupil or adult education student who engages in independent study on a full-time basis, or on a part-time basis in conjunction with part- or full-time classroom study, will be enabled to complete the district or county office of education adopted course of study within the customary time frame for completion of that course of study;

(b) pupils or adult education students who choose to engage in independent study are to have the same access to existing services and resources as the other pupils or adult education students of the school in which the independent study pupil or adult education student is enrolled; and

(c) pupils or adult education students who choose to engage in independent study are to have equality of rights and privileges with the pupils or adult education students of the district or county office of education who choose to continue in the regular school program.

(a) Each signature required for an independent study agreement shall be dated. An agreement is not in effect until it is complete as to all terms, signed and dated.

(b) The curriculum and methods of study specified in an independent study agreement shall be consistent with the district or county office of education policies and procedures for curriculum and instruction as adopted by the governing board.

(a) Maintaining records to meet audit requirements is the responsibility of the local district or county superintendent's office. These records may be on site(s).

(b) Records shall include but not be limited to:

(1) A copy of adopted governing board policy and procedures.

(2) A separate listing of the pupils and adult education students, by grade level, program and school, who have engaged in independent study, identifying units of the curriculum undertaken and units of the curriculum completed by each of those pupils in kindergarten and grades 1 to 8, inclusive, and identifying course credits attempted by and awarded to each of those pupils in grades 9 to 12 inclusive and each of those students in adult education, as specified in their written agreements.

(3) A file of all agreements, including representative samples of each pupil's or adult education student's work products bearing signed or initialed and dated notations by the supervising teacher indicating that he or she has personally evaluated the work, or that he or she has personally reviewed the evaluations made by another certificated teacher.

(4) A daily or hourly attendance credit register, as appropriate to the program in which the pupils or adult education students are enrolled, separate from classroom attendance records, and maintained on a current basis as time values of pupil or adult education student work products are personally judged by a certificated teacher, and reviewed by the supervising teacher if they are two different persons.

In a charter school, for the purposes of Education Code section 51745.6, the ratio of average daily attendance for independent study pupils to full-time equivalent (FTE) certificated employees responsible for independent study shall not exceed a pupil-teacher ratio of 25:1 or the ratio of pupils to full-time equivalent certificated employees for all other educational programs operated by the largest unified school district, as measured by average daily attendance, as reported at the second principal apportionment in the prior year, in the county or counties in which the charter school operates. Units of average daily attendance for independent study that are ineligible for apportionment as provided in subdivision (b) of Education Code section 51745.6 shall also be ineligible for funding pursuant to Chapter 6 (commencing with section 47630) of Part 26.8 of the Education Code. For purposes of this section, a "full-time certificated employee" means an

Section 11700.1 Additional definitions for charter schools

Section 11701 Governing board responsibilities

Section 11701.5 Equitable access

Section 11702 Independent study agreements

Section 11703 Records to be kept

Section 11704 Charter school pupil-teacher ratio

Section 11704
Charter school
pupil-teacher ratio
(continued)

employee who is required to work a minimum six-hour day and 175 days per fiscal year. Part-time positions shall generate a partial FTE on a proportional basis.

Section 11705
Charter high school
considered alternative school

For the purposes of subdivision (e) of Education Code section 51745, a charter school that includes any of grades 9 to 12, inclusive, shall be deemed to be an alternative school of every high school district and unified school district within which it operates.

CLASSROOM & NON-CLASSROOM BASED INSTRUCTION
California Code of Regulations, Title 5

Section 11963
Definition of
classroom-based instruction

(a) In accordance with the definition of classroom-based instruction specified in Education Code section 47612.5(e)(1), and for purposes of identifying and reporting that portion of a charter school's average daily attendance that is generated through nonclassroom-based instruction pursuant to Education Code sections 47634.2(c) and 47612.5(e)(2), classroom-based instruction in a charter school occurs only when all four of the following conditions are met.

(1) The charter school's pupils are engaged in educational activities required of those pupils, and the pupils are under the immediate supervision and control of an employee of the charter school who is authorized to provide instruction to the pupils within the meaning of Education Code section 47605(l).

(2) At least 80 percent of the instructional time offered at the charter school is at the schoolsite.

(3) The charter school's schoolsite is a facility that is used principally for classroom instruction.

(4) The charter school requires its pupils to be in attendance at the schoolsite at least 80 percent of the minimum instructional time required pursuant to Education Code section 47612.5(a)(1).

(b) The requirement to be "at the schoolsite" is satisfied if either of the following conditions is met.

(1) The facility in which the pupils receive instruction is:

(A) Owned, rented, or leased by the charter school principally for classroom instruction;

(B) Provided to the charter school by a school district pursuant to Education Code section 47614 principally for classroom instruction; or

(C) Provided to the charter school free-of-charge principally for classroom instruction pursuant to a written agreement. When not being used by the charter school for classroom instruction, the facility may be rented, leased, or allowed to be used for other purposes (e.g., for evening adult classes not offered by the charter school, local theater productions, or community meetings) and still be deemed to be principally for classroom instruction.

(2) The charter school facility meets the criteria in paragraph (1) of subdivision (b) and the pupils are on a field trip during which the pupils remain under the immediate supervision and control of the employee of the charter school and are carrying out an educational activity required of the pupils.

(c) The requirement to be "at the schoolsite" is not satisfied if the pupils are in a personal residence (i.e., a dwelling), even if space in the residence is set aside and dedicated to instructional purposes and/or the charter school rents or leases space in the residence for the provision of instruction. As used in this subdivision, a personal residence shall not include a facility that is licensed by a state or local government agency to operate as a facility in which pupils not related to the facility's owners are provided custodial care and supervision (e.g., a licensed children's institution or a boarding school).

(d) The definitions in this section are solely for the purpose of determining if a charter school must submit a determination of funding request pursuant to Education Code section 47634.2.

Section 11963.1
Nonclassroom-based
instruction in charter schools

This article does not change the requirement that nonclassroom-based instruction in charter schools comply with the provisions of Article 5.5 (commencing with Section 51745) of Chapter 5 of Part 28 of the Education Code.

Section 11963.2
SB 740: nonclassroom-based
funding determination

(a) A charter school may receive funding for nonclassroom-based instruction only if a determination of funding is made pursuant to Education Code section 47634.2. A determination of funding is a specific percentage approved by the State Board of Education for each affected charter school by which the charter school's reported nonclassroom-based average daily attendance must be adjusted by the Superintendent of Public Instruction prior to the apportioning of funds based upon that average daily attendance. A determination of funding shall only be approved by the State Board for a charter school if the charter school has submitted a request.

(b) A determination of funding request approved by the State Board of Education shall be 70 percent, unless a greater or lesser percentage is determined appropriate by the State Board of Education in accordance with section 11963.4. In no case shall an approved determination of funding exceed 100 percent.

**Section 11963.3
SB 740: nonclassroom-based
funding determination request
forms and calculations**

(a) For purposes of submitting a determination of funding request, the California Department of Education shall issue a form or set of forms to collect the information specified in this subdivision. Unless otherwise indicated, charter schools submitting a determination of funding request shall complete the form or forms in accordance with the definitions used in the 2005 edition of the California School Accounting Manual (which can be obtained from the California Department of Education web site at: <http://www.cde.ca.gov/fg/ac/sa>). The form or forms shall be developed by the California Department of Education in consultation with the Advisory Commission on Charter Schools. The form or forms shall include all of the following and, to the extent the form or forms include more than the following, the form or forms shall require the approval of the State Board of Education and comply with applicable provisions of the Administrative Procedure Act.

(1) The name, charter number, authorizing entity, address, contact name and title, telephone number, fax number, and email address, if any, for the charter school.

(2) The percentage requested by the school as its determination of funding.

(3) The number of fiscal years for which the determination of funding is requested, which shall not exceed five years.

(4) The date the charter was initially granted and the date the charter or charter renewal will expire.

(5) For charter schools that operated in the prior fiscal year, all of the following:

(A) The school's total resources, including all federal revenue, with federal Public Charter School Grant Program start-up, implementation, and dissemination grants separately identified; all state revenue; all local revenue with in-lieu property taxes separately identified; other financing sources; and the ending balance from the prior fiscal year.

(B) The school's total expenditures for instruction and related services, by object of expenditure, which shall include all of the following:

1. Activities dealing with the interaction between teaching staff and students, without regard to the instructional location or medium.

2. Services that provide administrative, technical, and logistical support to facilitate and enhance instruction.

3. Services in direct support of students.

4. School-sponsored extra-curricular or co-curricular activities designed to provide motivation and enjoyment and improvement of skills.

5. Instructional materials, supplies, and equipment.

(C) The school's total expenditures for schoolsite and administrative site operations and facilities, by object of expenditure, which shall include all of the following:

1. Activities concerned with securing and keeping open and working the physical plants, grounds, and equipment necessary for the operation of the school.

2. Facility rents, leases, and utilities.

3. Facilities acquisition and construction.

(D) The school's total expenditures for administration and all other activities, by object of expenditure, which shall include all of the following:

1. Activities concerned with establishing and administering policy for operating the entire charter school, such as the governing board, director, and administrative staff.

2. Other general administration activities, such as payroll and accounting services, auditing and legal services, property and liability insurance, personnel, charter-wide telephone service, and data processing services.

3. Supervisorial oversight fees charged by the chartering authority.

4. Other expenditures not reported elsewhere, such as those for community services and enterprise activities and cumulative administrative overhead from related party transactions.

(E) Other outgo and other uses, including debt service payments and transfers.

(F) The excess (or deficiency) of revenues over expenditures calculated by subtracting the total of subparagraphs (B), (C), (D), and (E), from the total resources reported pursuant to subparagraph (A), and a list of the amount of reserves for: facilities acquisition or construction, economic uncertainties, the amount required by the charter-authorizing entity, or other reserves. Reserves in excess of the greater of fifty-thousand dollars or five percent of total expenditures may be allowed for economic uncertainties or long-term expenditures such as capital projects if the excess reserves are satisfactorily explained pursuant to section 11963.4(b).

(6) For charter schools that did not operate in the prior fiscal year, the revenue and expenditure information required in paragraph (5) shall be provided using reasonable estimates of current-year annualized revenues and expenditures.

(b) In addition to the form or forms prescribed pursuant to subdivision (a), a complete determination of funding request shall also include the following information. Only a determination of funding request that is complete may be acted upon by the State Board of Education.

(1) A certification signed by the charter school's director, principal, or governing board chairperson of the following:

(A) That the information provided is true and correct to the best of the ability and knowledge of the individual authorized to do so by the charter school's governing board.

(B) That the charter school's nonclassroom-based instruction is conducted for and substantially dedicated to the instructional benefit of the school's students.

Section 11963.3
SB 740: nonclassroom-based
funding determination request
forms and calculations
(continued)

- (C) That the governing board of the charter school has adopted and implements conflict of interest policies.
- (D) That all of the charter school's transactions, contracts, and agreements are in the best interest of the school and reflect a reasonable market rate for all goods, services, and considerations rendered for or supplied to the school.
- (2) The charter school's pupil-teacher ratio as calculated pursuant to title 5, section 11704 of the California Code of Regulations.
- (3) A listing of entities that received in the previous fiscal year (or will receive in the current fiscal year) \$50,000 or more or 10 percent or more of the charter school's total expenditures identified pursuant to subparagraphs (B), (C), (D), and (E) of paragraph (5) of subdivision (a), the amount received by each entity; whether each of the contract payments is based on specific services rendered or upon an amount per unit of average daily attendance or some other percentage; and an identification of which entities, if any, have contract payments based on a per unit average daily attendance amount of some other percentage.
- (4) An identification of the members comprising the charter school's governing board (i.e., parent, teacher, etc.) and a description of how those members were selected; whether the governing board has adopted and implemented conflict of interest policies and procedures; and whether any of the governing board members are affiliated in any way with any of the entities reported pursuant to paragraph (3) and if so, how.
- (5) An explanation of all transfers reported pursuant to subparagraph (E) of paragraph (5) of subdivision (a).
- (6) A list and the amount of each of the other reserves reported pursuant to subparagraph (F) of paragraph (5) of subdivision (a).
- (7) To the extent that a charter school desires to have facility costs considered as an instructional cost, the total annual facility-related and operational cost, total facility square footage occupied by the charter school, total classroom-based average daily attendance (if applicable) as reported at the prior-year second principal apportionment, and the total student hours attended by nonclassroom-based pupils at the school site shall be provided.
- (8) The number of full-time equivalent employees who possess a valid teaching certificate, permit, or other document equivalent to that which a teacher in other public schools would be required to hold issued by the Commission on Teacher Credentialing and who work in the charter school in a position required to provide direct instruction or direct instructional support to students. For purposes of these regulations, "direct instructional support" includes, but is not limited to, activities that are directly related to student instruction that are performed by qualified certificated persons such as curriculum coordinators, individualized education plan coordinators, librarians, counselors, psychologists, and nurses.
- (c) The California Department of Education shall perform the following using the resource and expenditure data provided pursuant to subdivision (a).
- (1) A calculation showing the charter school's total expenditures for salaries and benefits for all employees who possess a valid teaching certificate, permit, or other document equivalent to that which a teacher in other public schools would be required to hold issued by the Commission on Teacher Credentialing (and who work in the charter school in a position required to provide direct instruction or direct instructional support to students) as a percentage of the school's total public revenues. For the purposes of this subdivision:
- (A) "Employees" shall include special education teachers who possess a valid teaching certificate, permit, or other document equivalent to that which special education teachers in non-charter public schools would be required to hold issued by the Commission on Teacher Credentialing, and who provide direct instruction or direct instructional support to pupils of the charter school pursuant to a contract with a public or private entity.
- (B) "Employees" shall include individuals who possess a valid certificate, permit, or other document equivalent to that which the individuals would be required to possess in a non-charter public school, issued by the Commission on Teacher Credentialing, and who are employed by a local education agency (LEA), provided all of the following conditions are met: the LEA is the employer of all the charter school's staff; the governing board of the LEA is the governing authority for the charter school (i.e., the charter school is not a corporate entity separate from the LEA); and the LEA's employees are assigned exclusively to work at the charter school providing direct instruction or direct instructional support to students or, to the extent that the LEA's employees are assigned to work at the charter school on a part-time basis, the charter school pays for the services rendered by the employee providing direct instruction or direct instructional support to students on a documented, fee-for-service basis and not, for example, on the basis of a fixed annual amount, fixed percentage of average daily attendance revenue, or other basis that is not related to documented services actually rendered to the charter school. Under no circumstances shall certificated employees of an LEA be considered employees of a charter school for purposes of this subparagraph unless the charter school pays for the services rendered by the LEA's employees on a documented, fee-for-service basis.

(C) For purposes of this section, "employee" also means qualified persons that provide direct instruction or direct instructional support, that are hired directly by the charter school through an employment services contract based on a documented, fee-for-service basis.

(D) The school's total public revenue is based on the amounts reported pursuant to subparagraph (A) of paragraph (5) of subdivision (a) and equals the sum of: all federal revenue, less any Public Charter School Grant Program start-up, implementation, and dissemination grant funds; state revenue; and local revenue from in-lieu property taxes.

(2) A calculation showing the charter school's total expenditures on instruction and related services as a percentage of the school's total revenues. For the purposes of this subdivision, the school's total revenues do not include the ending balance from the prior fiscal year.

(a) When a complete determination of funding request is received from a charter school, it shall be reviewed by the California Department of Education and presented to the Advisory Commission on Charter Schools, along with credible information pertaining to the request obtained from any other source. The Advisory Commission shall develop a recommendation pursuant to this section to the State Board of Education regarding the request, and that recommendation shall be presented to the State Board of Education by the California Department of Education. The following criteria shall guide the process of reviewing and developing a recommendation on the request. The California Department of Education shall report any difference of opinion between the California Department of Education and the Advisory Commission as to the recommendation presented to the State Board of Education.

(1) If the percentage calculated pursuant to paragraph (1) of subdivision (c) of section 11963.3 equals at least 35 percent but less than 40 percent, and the percentage calculated pursuant to paragraph (2) of subdivision (c) of section 11963.3 equals at least 60 percent but less than 70 percent, the Advisory Commission on Charter Schools shall recommend to the State Board of Education approval of the request at 70 percent, unless there is a reasonable basis to recommend otherwise. If the recommended percentage is lower than the requested percentage, the recommendation to the State Board shall include the reasons justifying the reduction and, if appropriate, describe how any deficiencies or problems may be addressed by the charter school.

(2) If the percentage calculated pursuant to paragraph (1) of subdivision (c) of section 11963.3 equals or exceeds 40 percent, and the percentage calculated pursuant to paragraph (2) of subdivision (c) of section 11963.3 equals at least 70 percent but less than 80 percent, the Advisory Commission on Charter Schools shall recommend to the State Board of Education approval of the request at 85 percent, unless there is a reasonable basis to recommend otherwise. The recommendation to the State Board shall include the reasons justifying a percentage that is greater than 70 percent and, if the recommended percentage is lower than the requested percentage, the reasons justifying the reduction and, if appropriate, describe how any deficiencies or problems may be addressed by the charter school.

(3) If the percentage calculated pursuant to paragraph (1) of subdivision (c) of section 11963.3 equals or exceeds 40 percent, the percentage calculated pursuant to paragraph (2) of subdivision (c) of section 11963.3 equals or exceeds 80 percent, and the ratio of average daily attendance for independent study pupils to full-time certificated employees responsible for independent study does not exceed a pupil-teacher ratio of 25:1 or the equivalent ratio of pupils to full-time certificated employees for all other educational programs operated by the largest unified school district, as measured by average daily attendance, in the county or counties in which the charter school operates, the Advisory Commission on Charter Schools shall recommend to the State Board of Education approval of the request at 100 percent (i.e. full funding), unless there is a reasonable basis to recommend otherwise. If the recommended percentage is lower than the requested percentage, the recommendation to the State Board shall include the reasons justifying the reduction and, if appropriate, describe how any deficiencies or problems may be addressed by the charter school.

(4) If the percentage calculated pursuant to paragraph (1) of subdivision (c) of section 11963.3 is less than 35 percent, or the percentage calculated pursuant to paragraph (2) of subdivision (c) of section 11963.3 is less than 60 percent, then the charter school's nonclassroom-based instruction is not substantially dedicated to the instructional benefit of the students, and the Advisory Commission on Charter Schools shall recommend that the State Board of Education deny the request, unless there is a reasonable basis to recommend otherwise. The recommendation to the State Board shall include the reasons justifying the denial and, if appropriate, describe how any deficiencies or problems may be addressed by the charter school. Denial of a determination of funding request by the State Board of Education shall result in no funding being apportioned for average daily attendance identified by the charter school as being generated through nonclassroom-based instruction pursuant to Education Code section 47634.2(c).

(5) Any request for a funding determination received prior to the effective date of these regulations will be reviewed pursuant to the criteria in effect at the time of submittal.

(b) The Advisory Commission on Charter Schools and/or the California Department of Education may ask the charter school to provide additional information in order to make possible a more detailed review or to develop a reasonable basis for a recommendation other than those prescribed in subdivision (a). With the consent of the Superintendent of Public Instruction, the

Section 11963.3
SB 740: nonclassroom-based
funding determination request
forms and calculations
(continued)

request for additional information shall be considered a reasonable inquiry to which the charter school must respond pursuant to Education Code section 47604.3.

(c) Any multi-year funding determination approved by the State Board of Education may be modified by the State Board of Education, in terms of both the multi-year approval and the percentage of funding authorized, if any information that may change the conclusion to approve the original multi-year funding determination is found.

(d) Prior to a recommendation by the Advisory Commission on Charter Schools (that a determination of funding request be denied or approved at a percentage lower than that requested) being forwarded to the State Board of Education, the affected charter school shall be given thirty (30) calendar days in which to amend its determination of funding request and/or to provide additional information in support of the request. Based upon consideration of the amended request or any additional information that may be provided, the Advisory Commission may modify its recommendation to the State Board.

(e) A reasonable basis for the Advisory Commission on Charter Schools to make a recommendation other than one that results from the criteria specified in subdivision (a) may include, but not be limited to, the following: the information provided by the charter school pursuant to paragraphs (2) through (8), inclusive, of subdivision (b) of section 11963.3, documented data regarding individual circumstances of the charter school (e.g., one-time or unique or exceptional expenses for facilities, acquisition of a school bus, acquisition and installation of computer hardware not related to the instructional program, special education charges levied on the charter school by a local educational agency, restricted state, federal, or private grants of funds awarded to the charter school that cannot be expended for teacher salaries, or contracted instructional services other than those for special education), the size of the charter school, and how many years the charter school has been in operation. The Advisory Commission on Charter Schools shall give charter schools with less than a total of one hundred (100) units of prior year second period average daily attendance or that are in their first year of operation serious consideration of full funding.

Section 11963.5
Nonclassroom-based funding
determination requests for
virtual or on-line schools

A virtual or on-line charter school is one in which at least 80 percent of teaching and student interaction occurs via the Internet.

(a) A virtual or on-line nonclassroom-based charter school may receive approval of a funding determination with no maximum pupil-teacher ratio if the charter school has and maintains an 8 or above Academic Performance Index (API) rank in either its statewide or similar schools ranking and has no less than a 6 in the other of these two rankings.

(b) In order to be funded pursuant to (a) above, a virtual or on-line charter school, must demonstrate that:

(1) The school has met its overall and subgroup API growth targets.

(2) Instructional expenditures are at least 85 percent of the overall school budget. A substantial portion of these expenditures (at least 25 percent of the charter school's general purpose entitlement and categorical block grant as defined in Education Code section 47632), are spent on technology that directly benefits students and teachers and results in improved student achievement.

(3) Computer-based instruction and assessment is provided to each student and includes the use of an on-line instructional management program, which at a minimum includes standards-based guided lessons, lesson plans, initial testing of students, periodic assessment of student achievement, and the use of other measurements of student progress over a period of time.

(4) Teachers are provided with technology tools and print media, which at a minimum must include: standards-aligned instructional materials, computer, printer, monitor, Internet service, telephone, staff development that provides for the monitoring of student progress, and a means of electronic communication for frequent student contact.

(5) All students are provided an individualized learning plan that is based on initial testing of the students and that is monitored either remotely or in person, by the teacher to evaluate student progress.

(6) All students are provided access to a computer, Internet service, printer, monitor, and standards-aligned materials based on State Board adopted academic content standards for each grade level and for each subject studied.

(7) All students eligible for special education supports and services receive those supports and services in accordance with their individualized education program.

(8) Charter school admission practices will not favor high performing students or recruit a student population that is of a higher socioeconomic group or lower racial or ethnic representation than the general population of the county or counties served. Admission practices not reflective of the county or counties served shall be cause for denial by the State Board of Education under this section.

Section 11963.6
Multi-year funding determinations
for nonclassroom-based instruction

(a) An approved determination of funding for a new charter school in its first year of operation shall be submitted by December 1 and shall be for two fiscal years. Within 90 days after the end of its first fiscal year of operation, a charter school shall submit unaudited actual expense reports and a funding determination form based on the school's actual second-year budget. If the Advisory Commission on Charter Schools determines that the actual expenditures of the charter school or the second year funding determination form do not support the funding determination for the

Section 11963.6
Multi-year funding determinations
for nonclassroom-based instruction
(continued)

second year, the Advisory Commission on Charter Schools shall recommend that the State Board of Education revise the funding determination.

(b) For the 2005-06 fiscal year only, a determination of funding request approved by the State Board of Education for any nonclassroom-based charter school that is not in its first year of operation shall be for the 2005-06 fiscal year and additionally a minimum of one year but a maximum of four years prospectively (for a total funding determination of not more than five years).

(c) Any determination of funding request approved by the State Board of Education for an existing nonclassroom-based charter school from the 2006-07 fiscal year forward shall be prospective (not for the current year), in increments of a minimum of two years and a maximum of five years in length. Beginning with the 2007-08 fiscal year, nonclassroom-based charter schools that had a funding determination in the prior year must submit a funding determination request by February 1 of the fiscal year prior to the year the funding determination will be effective, when a new request is required under these regulations.

(d) A determination of funding shall be subject to review each time a material change is made in the school's charter with respect to nonclassroom-based instruction, and may be subject to review each time the school's charter is renewed, and/or in accordance with any conditions the State Board of Education may impose at the time of the determination of funding request approval. A material change in the school's charter with respect to nonclassroom-based instruction is any significant change that affects the level of resources devoted to nonclassroom-based instruction, the courses to be offered through nonclassroom-based instruction, and/or the delivery of educational services to pupils receiving nonclassroom-based instruction. The charter school shall notify the California Department of Education no later than thirty (30) days after the material change is made.

(e) A charter school may submit a request for funding determination up to one year prior to the fiscal year in which the request will initially be effective. The State Board may grant the request for up to five years following the effective date of the request.

(f) Not more than 120 days following the receipt of a complete determination of funding request, the California Department of Education shall present the request and the recommendation of the Advisory Commission on Charter Schools to the State Board of Education in accordance with subdivision (a) of section 11963.4.

(g) If, during the effective period of a determination of funding, a charter school wishes to seek a higher or lower determination of funding, it shall do so by the filing of a new determination of funding request. During the effective period of a charter school's determination of funding, no more than one additional determination of funding request (which would replace the determination of funding then in effect) may be submitted by the charter school in the same fiscal year.

Any multi-year funding determination approved by the State Board of Education may be modified by the State Board of Education, in terms of both the multi-year approval and the funding authorized. The State Board of Education may terminate a determination of funding if updated or additional information requested by the California Department of Education and/or the Advisory Commission on Charter Schools is not made available by a charter school within thirty (30) calendar days or if credible information from any source supports termination. If the latter is the case, the charter schools shall be given thirty (30) calendar days prior to the termination of funding to provide additional information to support the school's determination of funding.

Section 11963.7
Termination of a multi-year
funding determination

PART V: LAWS RELATED TO STUDENTS

SUICIDE PREVENTION

Education Code

Section 215

Suicide prevention policy

Serving pupils grades 7 to 12

Serving pupils kindergarten to grade 6

Age-appropriate

Coordination with county mental health

Needs of high-risk groups

Suicide awareness and prevention

Employees acting within authorization and scope

Policy review every fifth year

(a) (1) The governing board or body of a local educational agency that serves pupils in grades 7 to 12, inclusive, shall, before the beginning of the 2017-18 school year, adopt, at a regularly scheduled meeting, a policy on pupil suicide prevention in grades 7 to 12, inclusive. The policy shall be developed in consultation with school and community stakeholders, school-employed mental health professionals, and suicide prevention experts and shall, at a minimum, address procedures relating to suicide prevention, intervention, and postvention.

(2) (A) The governing board or body of a local educational agency that serves pupils in kindergarten and grades 1 to 6, inclusive, shall, before the beginning of the 2020-21 school year, adopt, at a regularly scheduled meeting, a policy on pupil suicide prevention in kindergarten and grades 1 to 6, inclusive. The policy shall be developed in consultation with school and community stakeholders, the county mental health plan, school-employed mental health professionals, and suicide prevention experts and shall, at a minimum, address procedures relating to suicide prevention, intervention, and postvention.

(B) The policy for pupils in kindergarten and grades 1 to 6, inclusive, shall be age appropriate and shall be delivered and discussed in a manner that is sensitive to the needs of young pupils.

(C) The policy for pupils in kindergarten and grades 1 to 6, inclusive, shall be written to ensure proper coordination and consultation with the county mental health plan if a referral is made for mental health or related services on behalf of a pupil who is a Medi-Cal beneficiary.

(3) The policy shall specifically address the needs of high-risk groups, including, but not limited to, all of the following:

(A) Youth bereaved by suicide.

(B) Youth with disabilities, mental illness, or substance use disorders.

(C) Youth experiencing homelessness or youth in out-of-home settings, such as foster care.

(D) Lesbian, gay, bisexual, transgender, or questioning youth.

(4) (A) The policy shall also address any training on suicide awareness and prevention to be provided to teachers of pupils in all of the grades served by the local educational agency.

(B) Materials approved by a local educational agency for training shall include how to identify appropriate mental health services, both at the schoolsite and within the larger community, and when and how to refer youth and their families to those services.

(C) Materials approved for training may also include programs that can be completed through self-review of suitable suicide prevention materials.

(D) On or before January 1, 2025, a local educational agency shall revise its training materials to incorporate best practices identified by the department in the department's model policy.

(E) Commencing with the 2024-25 school year, local educational agencies are encouraged to provide suicide awareness and prevention training to teachers of pupils in all of the grades served by the local educational agency.

(5) The policy shall be written to ensure that a school employee acts only within the authorization and scope of the employee's credential or license. Nothing in this section shall be construed as authorizing or encouraging a school employee to diagnose or treat mental illness unless the employee is specifically licensed and employed to do so.

(6) (A) To assist local educational agencies in developing policies for pupil suicide prevention, the department shall develop and maintain a model policy in accordance with this section to serve as a guide for local educational agencies.

(B) On or before June 1, 2024, the department shall complete the development of, and issue to local educational agencies, resources and guidance on how to conduct suicide awareness and prevention training remotely.

(b) (1) The governing board or body of a local educational agency that serves pupils in kindergarten and grades 1 to 12, inclusive, shall review, at minimum every fifth year, its policy on pupil suicide prevention and, if necessary, update its policy.

(2) Nothing in this section shall prevent the governing board or body of a local educational agency from reviewing or updating its policy on pupil suicide prevention more frequently than every fifth year.

(3) On or before January 1, 2025, the governing board or body of a local educational agency that serves pupils in kindergarten and grades 1 to 12, inclusive, shall review and update its policy on pupil suicide prevention to incorporate best practices identified by the department in the department's model policy.

(c) For purposes of this section, "local educational agency" means a county office of education, school district, state special school, or charter school.

Section 215.5

Printing telephone numbers for suicide prevention and domestic violence hotlines on pupil identification cards

(a) (1) Commencing July 1, 2019, a public school, including a charter school, or a private school, that serves pupils in any of grades 7 to 12, inclusive, and that issues pupil identification cards shall have printed on either side of the pupil identification cards the telephone number described in subparagraph (A) and may have printed on either side of the pupil identification cards the text

line described in subparagraph (B) and the telephone number described in subparagraph (C)

(A) The telephone number for the National Suicide Prevention Lifeline: 1-800-273-8255.

(B) The Crisis Text Line, which can be accessed by texting HOME to 741741.

(C) A local suicide prevention hotline telephone number.

(2) Commencing October 1, 2020, a public school, including a charter school, or a private school, that serves pupils in any of grades 7 to 12, inclusive, and that issues pupil identification cards shall have printed on either side of the pupil identification cards the telephone number for the National Domestic Violence Hotline: 1-800-799-7233.

(b) (1) Commencing July 1, 2019, a public or private institution of higher education that issues student identification cards shall have printed on either side of the student identification cards the telephone number described in subparagraph (A) and may have printed on either side of the student identification cards the text line described in subparagraph (B) and the telephone numbers described in subparagraphs (C) and (D):

(A) The telephone number for the National Suicide Prevention Lifeline: 1-800-273-8255.

(B) The Crisis Text Line, which can be accessed by texting HOME to 741741.

(C) The campus police or security telephone number or, if the campus does not have a campus police or security telephone number, the local nonemergency telephone number.

(D) A local suicide prevention hotline telephone number.

(2) Commencing October 1, 2020, a public or private institution of higher education that issues student identification cards shall have printed on either side of the student identification cards the telephone number for either of the following:

(A) The National Domestic Violence Hotline: 1-800-799-7233.

(B) A local domestic violence hotline that provides confidential support services for students that have experienced domestic violence or stalking and is available by telephone 24 hours a day.

(c) Notwithstanding subdivisions (a) and (b), if, as of January 1, 2020, a school subject to the requirements of subdivision (a), or a public or private institution of higher education subject to the requirements of subdivision (b), has a supply of unissued pupil or student identification cards that do not comply with the requirements of subdivision (a) or (b), as applicable, the school or the public or private institution of higher education shall issue those pupil or student identification cards until that supply is depleted.

(d) Subdivisions (a) and (b) apply for a pupil or student identification card issued for the first time to a pupil or student, and to a pupil or student identification card issued to replace a damaged or lost pupil or student identification card.

SEX EQUITY
Education Code

(a) It is the policy of the state that elementary and secondary school classes and courses, including nonacademic and elective classes and courses, be conducted, without regard to the sex of the pupil enrolled in these classes and courses.

(b) A school district shall not prohibit a pupil from enrolling in any class or course on the basis of the sex of the pupil, except a class subject to Chapter 5.6 (commencing with Section 51930) of Part 28 of Division 4 of Title 2.

(c) A school district shall not require a pupil of one sex to enroll in a particular class or course, unless the same class or course is also required of a pupil of the opposite sex.

(d) A school counselor, teacher, instructor, administrator, or aide shall not, on the basis of the sex of a pupil, offer vocational or school program guidance to a pupil of one sex that is different from that offered to a pupil of the opposite sex or, in counseling a pupil, differentiate career, vocational, or higher education opportunities on the basis of the sex of the pupil counseled. Any school personnel acting in a career counseling or course selection capacity to a pupil shall affirmatively explore with the pupil the possibility of careers, or courses leading to careers, that are nontraditional for that pupil's sex. The parents or legal guardian of the pupil shall be notified in a general manner at least once in the manner prescribed by Section 48980, in advance of career counseling and course selection commencing with course selection for grade 7 so that they may participate in the counseling sessions and decisions.

(e) Participation in a particular physical education activity or sport, if required of pupils of one sex, shall be available to pupils of each sex.

(f) A pupil shall be permitted to participate in sex-segregated school programs and activities, including athletic teams and competitions, and use facilities consistent with his or her gender identity, irrespective of the gender listed on the pupil's records.

(a) On or before July 1, 2017, public schools, private schools that receive federal funds and are subject to the requirements of Title IX, school districts, county offices of education, and charter schools shall post in a prominent and conspicuous location on their Internet Web sites all of the following:

(1) The name and contact information of the Title IX coordinator for that public school, private school, school district, county office of education, or charter school, which shall include the

Section 215.5
Printing telephone numbers for suicide prevention and domestic violence hotlines on pupil identification cards
(continued)

Section 221.5
Sex equity; accommodating transgender students

Section 221.61
Title IX compliance; website posting

Section 221.61
Title IX compliance;
website posting
(continued)

Title IX coordinator's phone number and email address.

(2) The rights of a pupil and the public and the responsibilities of the public school, private school, school district, county office of education, or charter school under Title IX, which shall include, but shall not be limited to, Internet Web links to information about those rights and responsibilities located on the Internet Web sites of the department's Office for Equal Opportunity and the United States Department of Education Office of Civil Rights, and the list of rights specified in Section 221.8.

(3) A description of how to file a complaint under Title IX, which shall include all of the following:

(A) An explanation of the statute of limitations within which a complaint must be filed after an alleged incident of discrimination has occurred, and how a complaint may be filed beyond the statute of limitations.

(B) An explanation of how the complaint will be investigated and how the complainant may further pursue the complaint, including, but not limited to, Internet Web links to this information on the United States Department of Education Office for Civil Rights' Internet Web site.

(C) An Internet Web link to the United States Department of Education Office for Civil Rights complaints form, and the contact information for the office, which shall include the phone number and email address for the office.

(b) On or before April 1, 2017, and annually thereafter, the Superintendent shall send a letter through electronic means to all public schools, private schools that receive federal funds and are subject to the requirements of Title IX, school districts, county offices of education, and charter schools informing them of the requirement specified in subdivision (a) and of their responsibilities under Title IX.

(c) A public school that does not maintain an Internet Web site may comply with subdivision (a) by posting the information specified in paragraphs (1) to (3), inclusive, of subdivision (a) on the Internet Web site of its school district or county office of education.

(d) Nothing in this section shall be construed to require a school or local educational agency to establish an Internet Web site if the school or local educational agency does not already maintain one.

Section 221.9
Competitive athletics;
reporting required

(a) Commencing with the 2015-16 school year and every year thereafter, each public elementary and secondary school in the state, including each charter school, that offers competitive athletics shall publicly make available at the end of the school year all of the following information:

(1) The total enrollment of the school, classified by gender.

(2) The number of pupils enrolled at the school who participate in competitive athletics, classified by gender.

(3) The number of boys' and girls' teams, classified by sport and by competition level.

(b) The data required pursuant to subdivision (a) shall reflect the total number of players on a team roster on the official first day of competition.

(c) The school shall make the information specified in subdivision (a) publicly available as follows:
(1) If the school maintains an Internet Web site, by posting the information on the school's Internet Web site.

(2) If the school does not maintain an Internet Web site, by submitting the information to its school district or, for a charter school, to its charter operator. The school district or charter operator shall post the information on its Internet Web site, and the information shall be disaggregated by schoolsite.

(d) The materials used by a school to compile the information specified in subdivision (a) shall be retained by the school for at least three years after the information is posted on the Internet pursuant to subdivision (c).

(e) As used in this section, "competitive athletics" means sports where the activity has coaches, a governing organization, and practices, and competes during a defined season, and has competition as its primary goal.

EDUCATION INCLUSIVITY
Education Code

Section 202
Legislative findings

The Legislature finds and declares all of the following:

(a) California reaffirms that its laws and public policy support accurate and inclusive education in all of California's schools, including in all school districts, county offices of education, and charter schools.

(b) The California Constitution protects pupils' rights to share ideas and beliefs, including the right to receive information and knowledge, and guarantees pupils equal protection under the law.

(c) Education is a fundamental right under the California Constitution. State statutes further place upon local educational agencies the affirmative obligation to combat bias against pupils within their schools. Under California law, California schools must create an equitable learning environment where all pupils, including lesbian, gay, bisexual, transgender, queer, and questioning (LGBTQ) pupils and Black, Indigenous, and other pupils of color feel welcome, including through

honest discussions of racism, the history of slavery in our society and in California, and the diversity of gender and sexual orientation that reflects the lived reality of those pupils.

(d) Accurate and inclusive education is essential to ensure the educational success of all pupils, including LGBTQ pupils and Black, Indigenous, and other pupils of color.

(e) Restricting access to classroom and library materials because they feature LGBTQ people or were written by LGBTQ authors discriminates against LGBTQ people and constitutes censorship in violation of California law and policy. Similarly, efforts to categorically exclude topics related to race, ethnicity, gender, sexual orientation, or other protected characteristics, or of present or historical discrimination based on protected characteristics, from school library collections, curricula, or classroom discussions constitute censorship that violates California law and policy.

(f) The Superintendent and other state officials and agencies have the authority to enforce federal and state laws that protect pupils from unlawful discrimination and harassment and that require local educational agencies to create an equitable learning environment for all pupils, regardless of race, ethnicity, gender, sexual orientation, or other protected characteristics. This authority includes the power to ensure that local educational agencies comply with laws supporting pupils' right to receive accurate and inclusive education in California's schools.

(a) For purposes of this section, "local educational agency" means a school district, county office of education, or charter school, serving pupils in any of grades 7 to 12, inclusive.

(b) (1) On or before July 1, 2025, the department shall finalize the development of an online training delivery platform and online training curriculum to support lesbian, gay, bisexual, transgender, queer, and questioning (LGBTQ) cultural competency training for teachers and other certificated employees.

(2) The department may use resources developed pursuant to Section 148 of Chapter 44 of the Statutes of 2021 or Provisions 47 to 49, inclusive, of Item 6100-001-0001 of Section 2.00 of the Budget Act of 2021 (Chapters 21, 69, and 240 of the Statutes of 2021) to meet the requirements of paragraph (1).

(3) At a minimum, the training in paragraph (1) shall include information on all of the following topics:

(A) The creation of safe and supportive learning environments for LGBTQ+ pupils, including those with multiple intersecting identities, including, but not limited to, those who are members of the LGBTQ+ community, members of communities of color, immigrants, or people living with the human immunodeficiency virus.

(B) Identifying LGBTQ+ youth who are subject to, or may be at risk of, bullying and lack of acceptance at home or in their communities.

(C) The provision of targeted support services to LGBTQ+ youth, including counseling services.

(D) Requirements regarding school antibullying and harassment policies, and complaint procedures.

(E) Requirements regarding suicide prevention policies and related procedures.

(F) Requirements regarding policies relating to use of school facilities, including, but not limited to, bathrooms and locker rooms.

(G) Requirements regarding policies and procedures to protect the privacy of LGBTQ+ pupils.

(H) The importance of identifying local, community-based organizations that provide support to LGBTQ+ youth.

(I) The importance of identifying local physical and mental health providers with experience in treating and supporting LGBTQ+ youth.

(J) The formation of peer support or affinity clubs and organizations.

(K) The importance of school staff who have received antibias or other training aimed at supporting LGBTQ+ youth.

(L) Health and other curriculum materials that are inclusive of, and relevant to, LGBTQ+ youth.

(c) Commencing with the 2025–26 school year, and continuing through the 2029–30 school year, a local educational agency shall provide and require at least one hour of training annually to all teachers and other certificated employees serving pupils in grades 7 to 12, inclusive, in a manner designed to cover the core elements of the curriculum developed pursuant to subdivision (b) over the five-year period. A teacher or certificated employee shall be exempt from the annual requirement if they completed the required training within the same year at another local educational agency in this state. All of the following shall apply to the training under this section:

(1) A local educational agency may provide the training using the online training curriculum and platform pursuant to subdivision (b) or with in-service training using the resources developed by the department pursuant to Section 218 that meets the requirements of this section.

(2) A local educational agency shall maintain records documenting both of the following:

(A) The date that each employee satisfied the requirements of this section.

(B) The name of the entity that provided the training.

(3) Notwithstanding any other law, a local educational agency shall maintain the records required in paragraph (2) according to their local retention schedule after employees receive the training and make the records available to the department upon request, as part of the department's

Section 218.3
Inclusivity training
(continued)

annual compliance monitoring of state and federal programs. These records are public records subject to disclosure under the California Public Records Act (Division 10 (commencing with Section 7920.000) of Title 1 of the Government Code).

(4) A local educational agency shall ensure that teachers and all other certificated employees complete the training required by this section on paid time during the employees' regular work hours or designated professional development hours unless otherwise negotiated and mutually agreed upon with the employees' exclusive representative.

(5) Employees may complete training individually or as part of a group presentation and the training may be completed in shorter segments as long as the applicable hourly total requirement is met.

(d) A local educational agency shall ensure that the in-service training it chooses to use as an alternative to the online training pursuant to paragraph (1) of subdivision (c) is substantially similar to and meets the same standards of the online training described in this section.

(e) Nothing in this section shall prohibit a local educational agency from providing longer, more frequent, relevant in-service training to meet the online training standards, provided that it is mutually agreed to with the employee's exclusive representative.

(f) (1) The department shall monitor compliance with the training requirement pursuant to subdivision (c) through its existing annual compliance monitoring of state and federal programs.

(2) Notwithstanding Section 10231.5 of the Government Code, the department shall provide a report to the relevant policy and fiscal committees of the Legislature within nine months after the conclusion of the 2029–30 school year, summarizing the data collected through compliance monitoring over the five-year period, including the local educational agencies selected for monitoring and relevant compliance findings, if any, pursuant to this section. The department shall publicly post the report on its internet website.

(3) The report required by paragraph (2) shall be submitted in compliance with Section 9795 of the Government Code.

(g) This section shall become inoperative on July 1, 2031, and, as of January 1, 2032, is repealed.

Section 232.7
Body shaming

(a) (1) (A) On or before June 30, 2025, the State Department of Education, in consultation with the California Health and Human Services Agency, the Mental Health Services Oversight and Accountability Commission, and other relevant stakeholders, shall develop and post on its internet website a model policy and resources about body shaming that is appropriate for schools that serve pupils in kindergarten or any of grades 1 to 12, inclusive, and that local educational agencies may use to educate staff and pupils about the issue of body shaming.

(B) The State Department of Education, in consultation with the California Health and Human Services Agency, the Mental Health Services Oversight and Accountability Commission, and other relevant stakeholders, may use existing resources or frameworks, or both, about body shaming or body image, or both, to meet the requirements of subparagraph (A).

(2) Local educational agencies are encouraged to inform teachers, staff, parents, and pupils about the resources developed pursuant to subdivision (a), including, but not limited to, by providing information in pupil and employee handbooks and making the information available on each school's internet website.

(b) For purposes of this article, the following definitions apply:

(1) "Body shaming" means the action or practice of mocking or stigmatizing a person by making critical comments or observations about the shape, size, or appearance of the person's body.

(2) "Local educational agency" means a school district, county office of education, or charter school.

Section 234.1
Categorical Program Monitoring

The department, pursuant to subdivision (b) of Section 64001, shall monitor adherence to the requirements of Chapter 5.3 (commencing with Section 4900) of Division 1 of Title 5 of the California Code of Regulations and this chapter as part of its regular monitoring and review of local educational agencies, commonly known as the Categorical Program Monitoring process. The department shall assess whether local educational agencies have done all of the following:

(a) Adopted a policy that prohibits discrimination, harassment, intimidation, and bullying based on the actual or perceived characteristics set forth in Section 422.55 of the Penal Code, including immigration status, and Section 220 of this code, and disability, gender, gender identity, gender expression, nationality, race or ethnicity, religion, sexual orientation, or association with a person or group with one or more of these actual or perceived characteristics. The policy shall include a statement that the policy applies to all acts related to school activity or school attendance occurring within a school under the jurisdiction of the local educational agency, and all acts of the governing board or body of the local educational agency, the superintendent of the school district, and the county superintendent of schools in enacting policies and procedures that govern the local educational agency.

(b) Adopted a process for receiving and investigating complaints of discrimination, harassment, intimidation, and bullying based on any of the actual or perceived characteristics set forth in Section 422.55 of the Penal Code, including immigration status, and Section 220 of this code,

Section 234.1
Categorical Program Monitoring
(continued)

and disability, gender, gender identity, gender expression, nationality, race or ethnicity, religion, sexual orientation, or association with a person or group with one or more of these actual or perceived characteristics. The complaint process shall include, but not be limited to, all of the following:

- (1) A requirement that, if school personnel witness an act of discrimination, harassment, intimidation, or bullying, they shall take immediate steps to intervene when safe to do so.
- (2) A timeline to investigate and resolve complaints of discrimination, harassment, intimidation, or bullying that shall be followed by all schools under the jurisdiction of the school district.
- (3) An appeal process afforded to the complainant in the case of a disagreement with the resolution of a complaint filed pursuant to this section.
- (4) All forms developed pursuant to this process shall be translated pursuant to Section 48985.
- (c) Publicized antidiscrimination, antiharassment, anti-intimidation, and antibullying policies adopted pursuant to subdivision (a), including information about the manner in which to file a complaint, to pupils, parents, employees, agents of the governing board, and the general public. The information shall be translated pursuant to Section 48985.
- (d) (1) Provided, incident to the publicizing described in subdivision (c), to certificated schoolsite employees who serve pupils in any of grades 7 to 12, inclusive, who are employed by the local educational agency, information on existing schoolsite and community resources related to the support of lesbian, gay, bisexual, transgender, and questioning (LGBTQ) pupils, or related to the support of pupils who may face bias or bullying on the basis of religious affiliation, or perceived religious affiliation.
- (2) As used in this subdivision, both of the following apply:
 - (A) Schoolsite resources may include, but are not limited to, peer support or affinity clubs and organizations, safe spaces for LGBTQ or other at-promise pupils, counseling services, staff who have received antibias or other training aimed at supporting these pupils or who serve as designated support to these pupils, health and other curriculum materials that are inclusive of, and relevant to, these pupils, online training developed pursuant to Section 32283.5, and other policies adopted pursuant to this article, including related complaint procedures.
 - (B) Community resources may include, but are not limited to, community-based organizations that provide support to LGBTQ or other at-promise pupils and their families, and physical and mental health providers with experience or training in treating or supporting these pupils.
- (e) Posted the policy established pursuant to subdivision (a) in all schools and offices, including staff lounges and pupil government meeting rooms.
- (f) Maintained documentation of complaints and their resolution for a minimum of one review cycle.
- (g) Ensured that complainants are protected from retaliation and that the identity of a complainant alleging discrimination, harassment, intimidation, or bullying remains confidential, as appropriate.
- (h) Identified a responsible local educational agency officer for ensuring school district or county office of education compliance with the requirements of Chapter 5.3 (commencing with Section 4900) of Division 1 of Title 5 of the California Code of Regulations and this chapter.
- (i) Nothing in this section shall be construed to require school employees to engage with religious institutions in the course of identifying community support resources pursuant to this section.

(a) The governing board of a school district, a county board of education, or the governing body of a charter school shall not refuse to approve the use or prohibit the use of any textbook, instructional material, supplemental instructional material, or other curriculum for classroom instruction or any book or other resource in a school library on the basis that it includes a study of the role and contributions of any individual or group consistent with the requirements of Sections 51204.5 and 60040, unless the study of the role and contributions violates Section 51501 or 60044.

(b) Any action taken by the governing board of a school district, a county board of education, or the governing body of a charter school that violates subdivision (a) constitutes unlawful discrimination pursuant to Section 220.

(c) Notwithstanding any other law, a complaint pursuant to this section may be filed with the applicable school district, county office of education, or charter school under the Uniform Complaint Procedures set forth in Chapter 5.1 (commencing with Section 4600) of Division 1 of Title 5 of the California Code of Regulations, or may be filed with the Superintendent directly. In responding to such a complaint, the Superintendent may directly intervene without waiting for an investigation by the school district, county office of education, or charter school. A complaint filed pursuant to this subdivision shall identify the basis for filing the complaint directly with the Superintendent. The complainant shall present the Superintendent with evidence that supports the basis for the direct filing.

Section 243
Access to books and other curricular materials

Section 51204.5
Social sciences instruction

Instruction in social sciences shall include the early history of California and a study of the role and contributions of people of all genders, Native Americans, African Americans, Latino Americans, Asian Americans, Pacific Islanders, European Americans, LGBTQ+ Americans, persons with disabilities, and members of other ethnic, cultural, religious, and socioeconomic status groups, to the economic, political, and social development of California and the United States of America, with particular emphasis on portraying the role of these groups in contemporary society.

Section 51501
Textbooks and curricular materials

(a) The state board and any governing board shall not adopt any textbooks or other instructional materials for use in the public schools that contain any matter reflecting adversely upon persons on the basis of race or ethnicity, gender, religion, disability, nationality, or sexual orientation, or because of a characteristic listed in Section 220.

(b) A governing board shall not prohibit the continued use of an appropriately adopted textbook, instructional material, or curriculum on the basis that it contains inclusive and diverse perspectives, including those in compliance with Sections 51204.5, 51933, 51934, and 60040.

Section 60040
Societal diversity

(a) The contributions of people of all genders in all types of roles, including professional, vocational, and executive roles.

(b) The role and contributions of Native Americans, African Americans, Latino Americans, Asian Americans, Pacific Islanders, European Americans, LGBTQ+ Americans, persons with disabilities, and members of other ethnic, cultural, religious, and socioeconomic status groups to the total development of California and the United States.

(c) The role and contributions of the entrepreneur and labor in the total development of California

SAFE PLACE TO LEARN ACT
Education Code

Section 234.4
Adoption of procedures for preventing bullying and cyberbullying

(a) A local educational agency shall adopt, on or before December 31, 2019, procedures for preventing acts of bullying, including cyberbullying.

(b) For purposes of this section, a "local educational agency" means a school district, a county office of education, or a charter school.

Section 234.6
Information accessible on website

(a) For purposes of this article, "local educational agency" means a county office of education, school district, state special school, or charter school.

(b) Commencing with the 2020-21 academic year, each local educational agency shall ensure that all of the following information is readily accessible in a prominent location on the local educational agency's existing internet website in a manner that is easily accessible to parents or guardians and pupils:

Suicide prevention policy

(1) The local educational agency's policy on pupil suicide prevention in grades 7 to 12, inclusive, adopted pursuant to Section 215.

(2) The local educational agency's policy on pupil suicide prevention in kindergarten and grades 1 to 6, inclusive, adopted pursuant to Section 215, including reference to the age appropriateness of that policy.

(3) The definition of discrimination and harassment based on sex as described in Section 230. This shall include the rights set forth in Section 221.8.

(4) The Title IX information included on a local educational agency's internet website pursuant to Section 221.61.

(5) A link to the Title IX information included on the department's internet website pursuant to Section 221.6.

Sexual harassment policy

(6) The local educational agency's written policy on sexual harassment, as it pertains to pupils, prepared pursuant to Section 231.5.

Hate violence policy

(7) The local educational agency's policy, if it exists, on preventing and responding to hate violence as described in Section 233.

Anti-discrimination, harassment, intimidation, bullying policy

(8) The local educational agency's anti-discrimination, anti-harassment, anti-intimidation, and anti-bullying policies as described in Section 234.1.

Anti-discrimination, harassment, intimidation, bullying policy

(9) The local educational agency's anti-cyberbullying procedures adopted pursuant to Section 234.4.

Social media bullying

(10) A section on social media bullying that includes all of the following references to possible forums for social media bullying:

(A) Internet websites with free registration and ease of registration.

(B) Internet websites offering peer-to-peer instant messaging.

(C) Internet websites offering comment forums or sections.

(D) Internet websites offering image or video posting platforms.

Community-based organizations

(11) A link to statewide resources, including community-based organizations, compiled by the department pursuant to Section 234.5.

Additional information

(12) Any additional information a local educational agency deems important for preventing bullying and harassment.

PUPIL PROTECTIONS RELATING TO IMMIGRATION AND CITIZENSHIP STATUS

Education Code

(a) Except as required by state or federal law or as required to administer a state or federally supported educational program, school officials and employees of a local educational agency shall not collect information or documents regarding citizenship or immigration status of pupils or their family members.

(b) The superintendent of a school district, the superintendent of a county office of education, and the principal of a charter school, as applicable, shall report to the respective governing board or body of the local educational agency in a timely manner any requests for information or access to a schoolsite by an officer or employee of a law enforcement agency for the purpose of enforcing the immigration laws in a manner that ensures the confidentiality and privacy of any potentially identifying information.

(c) If an employee of a school is aware that a pupil's parent or guardian is not available to care for the pupil, the school shall first exhaust any parental instruction relating to the pupil's care in the emergency contact information it has for the pupil to arrange for the pupil's care. A school is encouraged to work with parents or guardians to update the emergency contact information and not to contact Child Protective Services to arrange for the pupil's care unless the school is unable to arrange for care through the use of emergency contact information or other information or instructions provided by the parent or guardian.

(d) The governing board or body of a local educational agency shall do both of the following:

(1) Provide information to parents and guardians, as appropriate, regarding their children's right to a free public education, regardless of immigration status or religious beliefs. This information shall include information relating to "know your rights" immigration enforcement established by the Attorney General and may be provided in the annual notification to parents and guardians pursuant to Section 48980 or any other cost-effective means determined by the local educational agency.

(2) Educate pupils about the negative impact of bullying other pupils based on their actual or perceived immigration status or their religious beliefs and customs.

(e) Nothing in this section prohibits the governing board or body of a local educational agency from establishing stronger standards and protections.

(f) (1) The Attorney General, by April 1, 2018, in consultation with the appropriate stakeholders, shall publish model policies limiting assistance with immigration enforcement at public schools, to the fullest extent possible consistent with federal and state law, and ensuring that public schools remain safe and accessible to all California residents, regardless of immigration status. The Attorney General shall, at a minimum, consider all of the following issues when developing the model policies:

(A) Procedures related to requests for access to school grounds for purposes related to immigration enforcement.

(B) Procedures for local educational agency employees to notify the superintendent of the school district or his or her designee, the superintendent of the county office of education or his or her designee, or the principal of the charter school or his or her designee, as applicable, if an individual requests or gains access to school grounds for purposes related to immigration enforcement. (C) Procedures for responding to requests for personal information about pupils or their family members for purposes of immigration enforcement.

(2) Notwithstanding the rulemaking provisions of the Administrative Procedure Act (Chapter 3.5 (commencing with Section 11340) of Part 1 of Division 3 of Title 2 of the Government Code), the Department of Justice may implement, interpret, or make specific this section without taking any regulatory action.

(g) All local educational agencies shall adopt the model policies developed pursuant to subdivision (f), or equivalent policies, by July 1, 2018.

(h) For purposes of this section, "local educational agency" means a school district, county office of education, or charter school.

Section 234.7 Charter schools and immigration enforcement

CALIFORNIA INTERSCHOLASTIC FEDERATION

Education Code

(a) The California Interscholastic Federation is a voluntary organization that consists of school and school-related personnel with responsibility for administering interscholastic athletic activities in secondary schools. It is the intent of the Legislature that the California Interscholastic Federation, in consultation with the department, implement the following policies:

(1) Give the governing boards of school districts specific authority to select their athletic league representatives.

(2) Require that all league, section, and state meetings affiliated with the California Interscholastic Federation be subject to the notice and hearing requirements of the Ralph M. Brown Act (Chapter 9 (commencing with Section 54950) of Part 1 of Division 2 of Title 5 of the Government Code).

(3) Establish a neutral final appeals body to hear complaints related to interscholastic athletic policies.

Section 33353 Reporting racial discrimination, harassment or hazing

Section 33353
Reporting racial discrimination,
harassment or hazing
(continued)

- (4) Provide information to parents and pupils regarding the state and federal complaint procedures for discrimination complaints arising out of interscholastic athletic activities.
- (5) Comply with the California Public Records Act (Division 10 (commencing with Section 7920.000) of Title 1 of the Government Code), and in doing so, as a third-party recipient of pupil and school personnel information, be afforded the same public records disclosure exemptions as are afforded to school districts, in order to protect the confidentiality of pupil and school personnel records and information.
- (b) (1) The California Interscholastic Federation shall report to the appropriate policy committees of the Legislature and the Governor on its evaluation and accountability activities undertaken pursuant to this section on or before January 1, 2023, and on or before January 1 every seven years thereafter. This report shall include, but not be limited to, the goals and objectives of the California Interscholastic Federation with regard to, and the status of, all of the following:
- (A) The governing structure of the California Interscholastic Federation, and the effectiveness of that governance structure in providing leadership for interscholastic athletics in secondary schools.
- (B) Methods to facilitate communication with agencies, organizations, and public entities whose functions and interests interface with the California Interscholastic Federation.
- (C) The quality of coaching and officiating, including, but not limited to, professional development for coaches and athletic administrators, and parent education programs.
- (D) Gender equity in interscholastic athletics, including, but not limited to, the number of male and female pupils participating in interscholastic athletics in secondary schools, and action taken by the California Interscholastic Federation in order to ensure compliance with Title IX of the federal Education Amendments of 1972 (20 U.S.C. Sec. 1681 et seq.).
- (E) Health and safety of pupils, coaches, officials, and spectators, including, but not limited to, racial discrimination, harassment, or hazing.
- (F) The economic viability of interscholastic athletics in secondary schools, including, but not limited to, the promotion and marketing of interscholastic athletics.
- (G) New and continuing programs available to pupil athletes.
- (H) Awareness and understanding of emerging issues related to interscholastic athletics in secondary schools.
- (2) It is the intent of the Legislature that the California Interscholastic Federation accomplish all of the following:
- (A) During years in which the California Interscholastic Federation is not required to submit a report to the Legislature and the Governor pursuant to paragraph (1), it shall hold a public comment period relating to that report at three regularly scheduled federation council meetings per year.
- (B) Annually allow public comment on the policies and practices of the California Interscholastic Federation at a regularly scheduled federation council meeting.
- (C) Require sections of the California Interscholastic Federation to allow public comment on the policies and practices of the California Interscholastic Federation and its sections, and the report required pursuant to paragraph (1), at each regularly scheduled section meeting.
- (D) Engage in a comprehensive outreach effort to promote the public hearings described in subparagraphs (A) and (C).
- (3) (A) Upon receiving a report from the California Interscholastic Federation pursuant to paragraph (1), the appropriate policy committees of the Legislature shall hold a joint hearing at which the California Interscholastic Federation shall testify and members of the public shall be encouraged to testify on information in the report, including, but not limited to, the information required in paragraph (1).
- (B) During years in which the California Interscholastic Federation is not required to submit a report to the Legislature and the Governor pursuant to paragraph (1), it shall, at the request of the appropriate policy committees of the Legislature, make itself available for hearings regarding the information in paragraph (1).
- (c) (1) (A) (i) On or before January 1, 2025, the department shall develop, in consultation with relevant stakeholders, a standardized incident form to track racial discrimination, harassment, or hazing that occurs at high school sporting games or sporting events, and annually report the information from completed incident forms as statewide totals on the department's internet website.
- (ii) The information reported by the department pursuant to clause (i) shall be provided on an aggregated basis and in a manner that does not disclose any personally identifying information.
- (B) The standardized incident form shall include a category for the basis of the complaint and shall include information on how to report a hate incident or hate crime through the Civil Rights Department's CA vs. Hate Resource Line and Network.
- (2) (A) On or before April 1, 2025, a local educational agency that participates in the California Interscholastic Federation shall post on their internet website the standardized incident form developed by the department pursuant to paragraph (1) and shall include information on how to submit a completed incident form to the local educational agency.

(B) A local educational agency that participates in the California Interscholastic Federation shall, upon request by the department, submit information related to any completed standardized incident forms received by the local educational agency.

(C) The department may share completed incident forms it has collected from a local educational agency with the California Interscholastic Federation to assist the California Interscholastic Federation with preparation of the report required pursuant to subdivision (b).

(3) A completed incident form is a public record pursuant to the California Public Records Act (Division 10 (commencing with Section 7920.000) of Title 1 of the Government Code) and is subject to all applicable exemptions from public disclosure under that act in order to protect the confidentiality of pupil and school personnel records and information.

(d) For purposes of this section, the following definitions apply:

(1) "Hazing" means a method of initiation or preinitiation into a pupil organization or body, whether or not the organization or body is officially recognized by an educational institution, that is likely to cause serious bodily injury or personal degradation or disgrace resulting in physical or mental harm to a former, current, or prospective pupil. "Hazing" does not include athletic events or school-sanctioned events.

(2) "Local educational agency" means a school district, county office of education, or charter school.

INTERSCHOLASTIC SPORTS: EMERGENCY PLANS AND DEFIBRILLATORS **Education Code**

If a school district or charter school elects to offer any interscholastic athletic program, the governing board of the school district or the governing body of the charter school shall ensure that there is a written emergency action plan in place that describes the location and procedures to be followed in the event of sudden cardiac arrest and other medical emergencies related to the athletic program's activities or events. The written emergency action plan shall be posted in compliance with the most recent pertinent guidelines of the National Federation of State High School Associations.

(a) For purposes of this section, "AED" means an automated external defibrillator.

(b) (1) Commencing July 1, 2019, if a school district or charter school elects to offer any interscholastic athletic program, the school district or the charter school shall acquire at least one AED for each school that participates in the program within the jurisdiction of the school district or the charter school. The school district or the charter school is encouraged to ensure that the AED or AEDs are available for the purpose of rendering emergency care or treatment within a recommended three to five minutes of sudden cardiac arrest to pupils, spectators, and any other individuals in attendance at the athletic program's on-campus activities or events, and shall ensure that the AED or AEDs are available to athletic trainers and coaches and authorized persons at these activities or events.

(2) If a school district or charter school elects to sponsor or host, in or around a swimming pool, an on-campus event that is not part of an interscholastic athletic program, the school district or charter school shall require at least one adult with a valid certification of cardiopulmonary resuscitation training to be present throughout the duration of the event. The presence of an adult with cardiopulmonary resuscitation training, as mandated by the California Interscholastic Federation coaching education program requirements, would satisfy this paragraph.

(c) Subdivision (b) of Section 49417 applies for purposes of determining if an employee of a school district is liable for any civil damages resulting from the employee's use, attempted use, or nonuse of an AED in the rendering of emergency care or treatment pursuant to this section.

(d) Subdivision (c) of Section 49417 applies for purposes of determining if a public school or school district is liable for any civil damages resulting from any act or omission in the rendering of emergency care or treatment pursuant to this section.

(e) Except as provided in subdivision (g), if an employee of a charter school complies with Section 1714.21 of the Civil Code in rendering emergency care or treatment through the use, attempted use, or nonuse of an AED at the scene of an emergency, the employee is not liable for any civil damages resulting from any act or omission in the rendering of the emergency care or treatment.

(f) Except as provided in subdivision (g), if a charter school complies with the requirements of Section 1797.196 of the Health and Safety Code, the charter school is covered by Section 1714.21 of the Civil Code, and is not liable for any civil damages resulting from any act or omission in the rendering of the emergency care or treatment.

(g) Subdivisions (e) and (f) do not apply in the case of personal injury or wrongful death that results from gross negligence or willful or wanton misconduct on the part of the person who uses, attempts to use, or fails to use an AED to render emergency care or treatment.

(h) In order to ensure public safety, each school district or charter school that elects to offer any

Section 35179.4 **Interscholastic sports;** **emergency plan required**

Section 35179.6 **Interscholastic sports;** **defibrillator required**

Section 35179.6
Interscholastic sports;
defibrillator required
(continued)

interscholastic athletic program shall ensure that its AED or AEDs are maintained and regularly tested according to the operation and maintenance guidelines set forth by the manufacturer, the American Heart Association, or the American Red Cross, and according to any applicable rules and regulations set forth by the governmental authority under the federal Food and Drug Administration and any other applicable state and federal authority.

(i) This section does not alter the requirements of Section 1797.196 of the Health and Safety Code.

ADORNMENT AT GRADUATION CEREMONIES

Education Code

Section 35183.1
Dress code; graduation ceremonies

(a) A pupil may wear traditional tribal regalia or recognized objects of religious or cultural significance as an adornment at school graduation ceremonies. Nothing in this section shall be construed to limit a local educational agency's discretion and authority to prohibit an item that is likely to cause a substantial disruption of, or material interference with, the ceremony.

(b) For purposes of this section, the following terms have the following meanings:

(1) "Adornment" means something attached to, or worn with, but not replacing, the cap and gown customarily worn at school graduation ceremonies.

(2) "Cultural" means recognized practices and traditions of a certain group of people.

(3) "Local educational agency" means a school district, county office of education, or charter school.

ALL GENDER RESTROOMS

Education Code

Section 35292.5
Restroom Facility Requirements

(a) Every public and private school maintaining any combination of classes from kindergarten to grade 12, inclusive, shall comply with all of the following:

(1) Every restroom shall at all times be maintained and cleaned regularly, fully operational, and stocked at all times with toilet paper, soap, and paper towels or functional hand dryers.

(2) The school shall keep all restrooms open during school hours when pupils are not in classes, and shall keep a sufficient number of restrooms open during school hours when pupils are in classes.

(b) (1) On or before July 1, 2026, each school district, county office of education, and charter school, including charter schools operating in a school district facility pursuant to Section 47614, maintaining any combination of classes from grades 1 to 12, inclusive, shall comply with the following for each of its schoolsites that, before July 1, 2026, has more than one female restroom and more than one male restroom designated exclusively for pupil use, excluding restrooms designated for pupils in transitional kindergarten or kindergarten:

(A) Provide and maintain at least one all-gender restroom for pupil use that meets the following requirements:

(i) Has signage identifying the bathroom facility as being open to all genders and in conformity with Title 24 of the California Code of Regulations.

(ii) Is available for pupil use, consistent with the requirements of subdivision (a), as unlocked, unobstructed, easily accessible by any pupil, and consistent with existing pupil access to sex-segregated restrooms.

(iii) Is consistent with the requirements pursuant to Section 35292.6.

(iv) Is available during school hours and school functions when pupils are present.

(B) Designate a staff member to serve as a point of contact for implementation of this section.

(C) Post a notice regarding the requirements of this paragraph in a prominent and conspicuous location outside at least one all-gender restroom, including contact information for the person designated as a point of contact pursuant to subparagraph (B).

(2) A school district, county office of education, or charter school may use an existing restroom to satisfy the requirements of this subdivision if it ensures that all pupils have restrooms that are in easily accessible locations and the existing restroom otherwise complies with the requirements in paragraph (1).

(3) This subdivision shall be subject to compliance review pursuant to Section 253.

(4) The department shall post on its internet website guidance for implementation of this subdivision, including, but not limited to, examples of signage and best practices.

(5) This subdivision shall not supplant subdivision (f) of Section 221.5. Use of an all-gender restroom by a pupil shall be voluntary and pupils shall not be required to use an all-gender restroom.

(6) This subdivision shall not preclude a schoolsite that does not have more than one female restroom and more than one male restroom designated exclusively for pupil use, excluding restrooms designated for pupils in transitional kindergarten or kindergarten, from identifying and making easily accessible, a restroom for pupil use that satisfies the requirements of this subdivision.

Section 35292.5
Restroom Facility Requirements
(continued)

(c) Notwithstanding subdivisions (a) and (b), a school may temporarily close a restroom as necessary (1) for a documented pupil safety concern, (2) for an immediate threat to pupil safety, or (3) to repair the facility.

MENSTRUAL EQUITY FOR ALL ACT OF 2021
Education Code

(a) On or before the start of the 2022–23 school year, a public school, including a school operated by a school district, county office of education, or charter school, maintaining any combination of classes from grades 6 to 12, inclusive, shall stock the school's restrooms at all times with an adequate supply of menstrual products, available and accessible, free of cost, in all women's restrooms and all-gender restrooms, and in at least one men's restroom.

(b) A public school described in subdivision (a) shall not charge for any menstrual products provided to pupils.

(c) A public school described in subdivision (a) shall post a notice regarding the requirements of this section in a prominent and conspicuous location in every restroom required to stock menstrual products, available and accessible, free of cost, pursuant to this section. This notice shall include the text of this section and contact information, including an email address and telephone number, for a designated individual responsible for maintaining the requisite supply of menstrual products.

(d) For purposes of this section, "menstrual products" means menstrual pads and tampons for use in connection with the menstrual cycle.

(e) This section shall become inoperative on July 1, 2024, and, as of January 1, 2025, is repealed.

PUPIL TRANSPORTATION
Education Code

(a) Except as provided pursuant to subdivisions (b) to (g), inclusive, this article shall apply to all drivers employed by a local educational agency, contracted by a local educational agency, or contracted by any entity with funding from a local educational agency, providing school-related pupil transportation for compensation.

(b) Nothing in this article shall be construed to apply to a driver employed by any of the following:

(1) A municipally owned transit system offering supplementary service.

(2) A congregate care facility licensed by the State Department of Social Services.

(3) A county human services agency.

(4) An entity, excluding entities with a primary purpose of providing transportation services, serving pupils experiencing homelessness that is coordinated with the homeless continuum of care in counties that have one or otherwise designated to serve children who are homeless by a county without a continuum of care.

(5) A county probation agency.

(6) Another government agency, other than a local educational agency.

(7) A foster family agency, as defined in paragraph (4) of subdivision (a) of Section 1502 of the Health and Safety Code.

(8) A tribal authority.

(c) Nothing in this article shall be construed to apply to any of the following persons who are compensated to drive a pupil:

(1) A parent or relative as defined in paragraph (2) of subdivision (c) of Section 361.3 of the Welfare and Institutions Code, or a nonrelative extended family member as defined in Section 362.7 of the Welfare and Institutions Code.

(2) A guardian.

(3) A caregiver given temporary or permanent custody of the pupil by a court, child welfare agency, tribal authority, or county probation department.

(4) A court-appointed educational rights holder.

(5) A court-appointed special advocate.

(6) A pupil who drives themselves.

(d) If both of the following occur, nothing in this article shall be construed to apply to a school employee of a local educational agency when the employee provides transportation to pupils due to or because of the employee's supervision of pupils for a field trip, extracurricular activity, or athletic program, or when the employee provides transportation to pupils for other activities, not to exceed 40 hours of drive time per school year per employee:

(1) A local educational agency makes a reasonable effort to secure a driver who meets the requirements of this article.

(2) When a local educational agency is unable to secure a driver who meets the requirements of this article, the local educational agency informs the parent, guardian, or court-appointed educational rights holder of the pupil being transported that the driver transporting their pupil

Section 35292.6
Menstrual products available
in school restrooms free of charge
in the 2022-23 school year

Section 39875
Exceptions to driver requirements
(operative July 1, 2025)

Section 39875

Exceptions to driver requirements

(operative July 1, 2025)

(continued)

does not meet the requirements of this article, unless that notice will jeopardize a pupil's privacy rights.

(e) Nothing in this article shall be construed to apply to a driver who transports a pupil who must be immediately transported to a facility in the case of a medical or psychiatric emergency, or in the case of pupils who need to be transported immediately as the result of an emergency that arises as a result of a fire, flood, earthquake, or epidemic, or because of any order of any military officer of the United States or of the state to meet an emergency created by war, or because of an immediate threat to the physical safety of the pupil or pupils. The exemption pursuant to this subdivision involving an epidemic shall only apply to each epidemic for a period lasting no longer than one month.

(f) Nothing in this article shall be construed to apply to a driver who transports a pupil if the transportation is being provided through a Foster Youth Services Coordinating Program while a pupil's transportation plan is being finalized. The exemption pursuant to this subdivision shall apply for a period lasting no longer than one month after the first ride is provided to that pupil under this exemption.

(g) Nothing in this article shall be construed to apply to a driver during a trip for which they are authorized by the local educational agency to transport one or more pupils for a field trip when the destination is more than 200 miles from the transported pupil's California school campus.

Section 39877

Driver qualifications for vehicles with capacity for 9 or fewer passengers

(operative July 1, 2025)

(a) A driver who provides transportation services for pupils in a vehicle with a maximum capacity of 10 or fewer persons, including the driver, shall:

(1) Hold a valid California driver's license for the appropriate class of vehicle.

(2) Be at least 18 years of age.

(3) Pass a criminal background check, including fingerprint clearance consistent with Section 45125 for employees and Section 45125.1 for all other compensated drivers.

(4) Have a satisfactory driving record that includes none of the following:

(A) Within three years, has committed any violation that results in a conviction assigned a violation point count of two or more, as defined in Sections 12810 and 12810.5 of the Vehicle Code.

(B) Within three years, has had their driving privilege suspended, revoked, or on probation for any reason involving the unsafe operation of a motor vehicle.

(C) Has been determined by the Department of Motor Vehicles to be a negligent or incompetent operator.

(5) Not have demonstrated irrational behavior to the extent that a reasonable and prudent person would have reasonable cause to believe that the driver's ability to perform the duties of a driver may be impaired.

(6) Not have been convicted of an offense listed in paragraph (1) of subdivision (a) of Section 13370 of the Vehicle Code, paragraph (5) of subdivision (a) of Section 13370 of the Vehicle Code, or subdivision (b) of Section 13370 of the Vehicle Code.

(7) Provide their employer or the private entity contracting with the local educational agency a report showing the driver's current public record as recorded by the Department of Motor Vehicles and participate in the Department of Motor Vehicles' pull-notice system.

(8) Be subjected to and comply with drug and alcohol testing consistent with Section 34520.3 of the Vehicle Code, subject to the cannabis discrimination limitations described in Section 12954 of the Government Code.

(9) (A) Complete a medical examination not more than two years prior to the driver performing pupil transportation by a physician licensed to practice medicine, a licensed advanced practice registered nurse qualified to perform a medical examination, a licensed physician assistant, or a licensed doctor of chiropractic listed on the most current National Registry of Certified Medical Examiners, as adopted by the United States Department of Transportation. The driver shall provide a copy of the Medical Examiner's Certificate, Form MCSA-5876, or the medical examiner's certificate of clearance to their employer or the private entity contracting with the local educational agency. Neither the driver nor the medical examiner need to submit this examination result to the Department of Motor Vehicles.

(B) The driver shall complete a medical examination pursuant to this paragraph every two years after the initial examination and provide a copy of the Medical Examiner's Certificate, Form MCSA-5876, or the medical examiner's certificate of clearance to their employer or the private entity contracting with the local educational agency.

(C) Within the same month of reaching 65 years of age and each 12th month thereafter, the driver shall undergo a medical examination pursuant to this paragraph and provide a copy of the Medical Examiner's Certificate, Form MCSA-5876, or the medical examiner's certificate of clearance to their employer or the private entity contracting with the local educational agency.

(10) Submit and clear a tuberculosis risk assessment consistent with Section 49406.

(11) Not drive for more than 10 hours within a work period, or after the end of the 16th hour after coming on duty following eight consecutive hours off duty.

(12) Complete initial training and subsequent required training sufficient to gain proficiency in all of the following:

- (A) Pretrip vehicle inspections.
 - (B) Safe loading and unloading of passengers.
 - (C) Proper use of seatbelts and child safety restraints.
 - (D) Handling accidents, incidents, and emergency situations.
 - (E) Providing proper accommodations for pupils with disabilities.
 - (F) Defensive driving.
 - (G) Operations in inclement weather.
 - (H) Operations at night or under impaired visibility conditions.
- (13) Maintain a daily log sheet and complete the daily pretrip inspection of the vehicle being driven that day, which shall include all of the following:

- (A) A check of the operability of all lights, initialed by the driver before the vehicle is first driven in service that day.
- (B) A check for fluid leaks, initialed by the driver before the vehicle is first driven in service that day.
- (C) A check for the operability of the brakes, initialed by the driver before the vehicle is driven in service that day.

(14) Complete training at least equivalent to the American Red Cross first aid training program, or hold a valid and current first aid certificate issued by the American Red Cross or by an organization whose first aid training program is at least equivalent to the American Red Cross' first aid training program, as determined by the Emergency Medical Services Authority.

- (b) For vehicles with a maximum capacity of eight or fewer passengers, excluding the driver, only street-legal coupes, sedans, or light-duty vehicles, including vans, minivans, sport utility vehicles, and pickup trucks, shall be used for pupil transportation.
- (c) Nothing in this article shall limit any additional safety or training requirements that may be imposed by the Public Utilities Commission, a local educational agency, or any government agency.

A driver who provides transportation services for pupils in a vehicle with a capacity of more than 10 persons, including the driver, shall:

- (a) Hold a valid California commercial driver's license for the appropriate class of vehicle, endorsed for passenger transportation pursuant to Section 15278 of the Vehicle Code.
- (b) Comply with paragraphs (2) to (14), inclusive, of subdivision (a) of Section 39877 if they are not already required to by law.
- (c) This article shall not reduce other legal requirements placed on any driver who provides transportation services for pupils in a vehicle with a capacity of more than 10 persons, including, but not limited to, a driver of a schoolbus or school pupil activity bus.

(a) Any local educational agency contracting with a private entity to provide pupil transportation shall obtain from the private entity a written attestation to all of the following:

- (1) That it not have any applicable law violations at the time of applying for the contract.
- (2) That it will maintain compliance with applicable laws for the duration of the contract.
- (3) That only drivers who meet the requirements of paragraphs (1) to (14), inclusive, of subdivision (a) of Section 39877 work, or will work, under the contract between the private entity and local educational agency.
- (4) That it has on file all the reports and documents required pursuant to paragraphs (1) to (14), inclusive, of subdivision (a) of Section 39877 for the duration of the contract, including, but not limited to, updated, revised, or modified reports and documents. These reports and documents shall be available for inspection by the local educational agency or any other state regulatory agency at any time.
- (b) A third party may report to the relevant local educational agency that the private entity the local educational agency contracted with has failed to provide a truthful attestation as required under subdivision (a) or has failed to maintain compliance with the applicable laws required for the duration of the contract. The third party shall provide documentation to substantiate their allegation before the local educational agency considers it.
- (c) Any vehicle used to provide pupil transportation for compensation by a local educational agency shall meet both of the following:
 - (1) Be inspected every 12 months, or every 50,000 miles, whichever comes first, at a facility licensed by the Bureau of Automotive Repair to ensure that the vehicle passes a 19-point vehicle inspection, as adopted by the Public Utilities Commission and set forth in D.13-09-045, before allowing the vehicle to be driven. This requirement does not apply to vehicles owned or contracted with a local educational agency already subject to a statutory inspection program.
 - (2) Be equipped with a first aid kit and a fire extinguisher.

Section 39877
Driver qualifications for vehicles
with capacity for 9 or fewer
passengers

(operative July 1, 2025)
(continued)

Section 39878
Driver qualifications for vehicles
with capacity for more than 9
passengers

(operative July 1, 2025)

Section 39879
Requirements for private
transportation providers

(operative July 1, 2025)

Section 39880
Contracts prior to January 1, 2024

- (a) To the extent that the requirements of this article conflict with a contract entered into between a local educational agency and a private entity before January 1, 2024, this article shall not apply until the expiration or renewal of that contract.
- (b) As used in this section, "local educational agency" means a school district, county office of education, charter school, entity providing services under a school transportation joint powers agreement, or regional occupational center or program.

Section 39881
Definitions
(operative July 1, 2025)

- As used in this article, the following definitions apply:
- (a) "Applicable law" means applicable California laws within the Labor and Workforce Development Agency's jurisdiction related to the misclassification of employees as independent contractors, including the failure to pay wages, imposing unlawful expenses on employees, failure to provide workers' compensation insurance, and failure to remit payroll taxes as required under the Unemployment Insurance Code as well as laws protecting worker health and safety.
- (b) "Applicable law violation" means a violation that has a final determination, order, judgment, or award issued against a private entity for engaging in illegal conduct related to applicable laws and that remains unabated or unsatisfied following the period during which an appeal may be made.
- (c) "Congregate care facility" means a community care facility, intermediate care facility, skilled nursing facility, or a short-term residential therapeutic program.
- (d) "Local educational agency" means a school district, county office of education, charter school, entity providing services under a school transportation joint powers agreement, or regional occupational center or program.
- (e) "School-related pupil transportation" means home-to-school transportation, field trips, after school program-related transportation, preschool and childcare-related transportation, athletic program-related transportation, extracurricular school activity-related transportation, or any transportation of pupils to or from a school campus.
- (f) "Municipally owned transit system" means a transit system owned by a city, or by a district created pursuant to Part 1 (commencing with Section 24501) of Division 10 of the Public Utilities Code.
- (g) "Supplementary service" means additional service provided by a municipally owned transit system for the purpose of ensuring the regular transit service is not impacted by large loads associated with pupil passengers traveling to or from schoolsites around school bell times.

Section 49406
Tuberculosis screening of drivers and volunteers

- (a) (1) (A) Except as provided in subdivision (j), a person shall not be initially employed by a school district, or employed under contract, in a certificated or classified position unless the person has submitted to a tuberculosis risk assessment within the past 60 days, and, if tuberculosis risk factors are identified, has been examined to determine that the person is free of infectious tuberculosis by a physician and surgeon licensed under Chapter 5 (commencing with Section 2000) of Division 2 of the Business and Professions Code, a physician assistant practicing in compliance with Chapter 7.7 (commencing with Section 3500) of Division 2 of the Business and Professions Code, or a nurse practitioner practicing in compliance with Chapter 6 (commencing with Section 2700) of Division 2 of the Business and Professions Code. If no risk factors are identified, an examination is not required. A person who is subject to the requirements of this subdivision may submit to an examination that complies with subparagraph (B) instead of submitting to a tuberculosis risk assessment.
- (B) The examination required by this subdivision shall consist of either an approved intradermal tuberculin test or any other test for tuberculosis infection that is recommended by the federal Centers for Disease Control and Prevention (CDC) and licensed by the federal Food and Drug Administration (FDA). If the test is positive, the test shall be followed by an X-ray of the lungs in accordance with subdivision (f) of Section 120115 of the Health and Safety Code.
- (2) The X-ray may be taken by a competent and qualified X-ray technician if the X-ray is subsequently interpreted by a physician and surgeon licensed under Chapter 5 (commencing with Section 2000) of Division 2 of the Business and Professions Code.
- (3) The district superintendent of schools or their designee may exempt, for a period not to exceed 60 days following termination of the pregnancy, a pregnant employee from the requirement that a positive test for tuberculosis infection be followed by an X-ray of the lungs.
- (b) Thereafter, an employee who has no identified risk factors or who tests negative for the tuberculosis infection shall be required to undergo the tuberculosis risk assessment and, if risk factors are identified, the examination, at least once every four years or more often if directed by the governing board of the school district upon recommendation of the local health officer. Once an employee has a documented positive test for tuberculosis infection conducted pursuant to this subdivision that has been followed by an X-ray, the tuberculosis risk assessment is no longer required. A referral shall be made within 30 days of completion of the examination to the local health officer to determine the need for followup care.
- (c) After the tuberculosis risk assessment and, if indicated, the examination, the employee shall file with the district superintendent of schools a certificate from the examining physician and surgeon, physician assistant, or nurse practitioner showing the employee was examined and found free from infectious tuberculosis. The county board of education may require, by rule, that the certificates be filed in the office of the county superintendent of schools or maintained in the

office of the county superintendent of schools if a majority of the governing boards of the school districts within the county petition the county board of education. A school district, or school districts with a common governing board, having an average daily attendance of 60,000 or more may elect to maintain the files for its employees in that school district.

(d) As used in this section, "certificate" means a certificate signed by the examining physician and surgeon licensed under Chapter 5 (commencing with Section 2000) of Division 2 of the Business and Professions Code, a physician assistant practicing in compliance with Chapter 7.7 (commencing with Section 3500) of Division 2 of the Business and Professions Code, or a nurse practitioner practicing in compliance with Chapter 6 (commencing with Section 2700) of Division 2 of the Business and Professions Code, or a notice from a public health agency that indicates freedom from infectious tuberculosis. The latter, regardless of form, shall constitute evidence of compliance with this section.

(e) Nothing in this section shall prevent the governing board of a school district, upon recommendation of the local health officer, from establishing a rule requiring a more extensive or more frequent physical examination than required by this section. The rule shall provide for reimbursement on the same basis as required in this section.

(f) The tuberculosis risk assessment and, if indicated, the examination is a condition of initial employment and the expense shall be borne by the applicant unless otherwise provided by rules of the governing board of the school district. However, the governing board of a school district may, if an applicant is accepted for employment, reimburse that person in a like manner prescribed in this section for employees.

(g) The governing board of a school district shall reimburse the employee for the cost, if any, of the tuberculosis risk assessment and the examination. The governing board of a school district may provide for the tuberculosis risk assessment and examination required by this section or may establish a reasonable fee for the examination that is reimbursable to employees of the school district complying with this section.

(h) At the discretion of the governing board of a school district, this section shall not apply to those employees not requiring certification qualifications who are employed for any period of time less than a school year whose functions do not require frequent or prolonged contact with pupils.

(i) If the governing board of a school district determines by resolution, after hearing, that the health of pupils in the school district would not be jeopardized, this section shall not apply to an employee of the school district who files an affidavit stating that the employee adheres to the faith or teachings of a well-recognized religious sect, denomination, or organization and, in accordance with its creed, tenets, or principles, depends for healing upon prayer in the practice of religion, and that to the best of the employee's knowledge and belief, the employee is free from infectious tuberculosis. If at any time there is probable cause to believe that the affiant is afflicted with infectious tuberculosis, the employee may be excluded from service until the governing board of the school district is satisfied that the employee is not afflicted.

(j) A person who transfers employment from one school or school district to another school or school district shall be deemed to meet the requirements of subdivision (a) if that person can produce a certificate that shows the person was found to be free of infectious tuberculosis within 60 days of initial hire, or the school previously employing the person verifies that the person has a certificate on file showing that the person is free from infectious tuberculosis.

(k) A person who transfers their employment from a private or parochial elementary school, secondary school, or nursery school to a school or school district subject to this section shall be deemed to meet the requirements of subdivision (a) if that person can produce a certificate as provided for in Section 121525 of the Health and Safety Code that shows that they were found to be free of infectious tuberculosis within 60 days of initial hire, or if the school previously employing the person verifies that the person has a certificate on file showing that the person is free from infectious tuberculosis.

(l) (1) A governing board, county superintendent of schools, or governing body of a charter school providing for the transportation of pupils under contract authorized by Section 39800, 39801, or any other provision of law shall require as a condition of the contract the tuberculosis risk assessment and, if indicated, the examination for infectious tuberculosis within 60 days of initial hire, as provided by subdivision (a), of all drivers transporting pupils for compensation.

(2) At the discretion of the governing board, county superintendent of schools, or governing body of a charter school, paragraph (1) shall not apply to a private contracted driver who transports pupils infrequently and without prolonged contact with the pupils before July 1, 2025.

(m) A volunteer in a school shall also be required to have on file with the school a certificate showing that, upon initial volunteer assignment, the person submitted to a tuberculosis risk assessment and, if tuberculosis risk factors were identified, was examined and found to be free of infectious tuberculosis. If no risk factors are identified, an examination is not required. At the discretion of the governing board of a school district, this section shall not apply to a volunteer whose functions do not require frequent or prolonged contact with pupils.

Section 49406
Tuberculosis screening of drivers
and volunteers
(continued)

(n) The State Department of Public Health, in consultation with the California Tuberculosis Controllers Association, shall develop a risk assessment questionnaire, to be used to conduct tuberculosis risk assessments pursuant to this section. The risk assessment questionnaire shall be administered by a health care provider, which shall be specified on the questionnaire. This risk assessment questionnaire shall be exempt from the rulemaking provisions of the Administrative Procedure Act (Chapter 3.5 (commencing with Section 11340) of Part 1 of Division 3 of Title 2 of the Government Code).

SCHOOL START TIME
Education Code

Section 46148
High schools and middle schools;
school day start times

(a) (1) The schoolday for high schools, including high schools operated as charter schools, shall begin no earlier than 8:30 a.m.
(2) The schoolday for middle schools, including middle schools operated as charter schools, shall begin no earlier than 8:00 a.m.
(b) For purposes of this section, "schoolday" has the same meaning as defined by the school district or charter school for purposes of calculating average daily attendance in order to compute any apportionments of state funding. This section does not prohibit a school district or charter school from offering classes or activities to a limited number of pupils before the start of the schoolday that do not generate average daily attendance for purposes of computing any apportionments of state funding.
(c) This section shall be implemented by middle schools and high schools no later than July 1, 2022, or the date on which a school district's or charter school's respective collective bargaining agreement that is operative on January 1, 2020, expires, whichever is later.
(d) This section shall not apply to rural school districts.
(e) The department is encouraged to post on its internet website available research on the impact of sleep deprivation on adolescents and the benefits of a later school start time and examples of successful strategies for managing the change to a later school start time, and to advise school districts and charter schools of this posting.
(f) The Legislature encourages school districts, charter schools, and community organizations to inform their communities, including parents, teenagers, educators, athletic coaches, and other stakeholders, about the health, safety, and academic impact of sleep deprivation on middle and high school pupils and the benefits of a later school start time, and to discuss local strategies to successfully implement the later school start time.

ELECTRONIC LISTENING AND RECORDING IN THE CLASSROOM
Education Code

Section 51512
Consent and educational purpose
required for classroom recording

The Legislature finds that the use by any person, including a pupil, of any electronic listening or recording device in any classroom of the elementary and secondary schools without the prior consent of the teacher and the principal of the school given to promote an educational purpose disrupts and impairs the teaching process and discipline in the elementary and secondary schools, and such use is prohibited. Any person, other than a pupil, who willfully violates this section shall be guilty of a misdemeanor.
Any pupil violating this section shall be subject to appropriate disciplinary action.
This section shall not be construed as affecting the powers, rights, and liabilities arising from the use of electronic listening or recording devices as provided for by any other provision of law.

PUPILS IN FOSTER CARE OR EXPERIENCING HOMELESSNESS
Education Code

Section 48850
Enrollment of pupils in foster care
or experiencing homelessness

(a) (1) It is the intent of the Legislature to ensure that all pupils in foster care and those who are homeless, as defined by the federal McKinney-Vento Homeless Assistance Act (42 U.S.C. Sec. 11301 et seq.), have a meaningful opportunity to meet the challenging state pupil academic achievement standards to which all pupils are held. In fulfilling their responsibilities to these pupils, educators, county placing agencies, care providers, advocates, and the juvenile courts shall work together to maintain stable school placements and to ensure that each pupil is placed in the least restrictive educational programs, and has access to the academic resources, services, and extracurricular and enrichment activities that are available to all pupils, including, but not necessarily limited to, interscholastic sports administered by the California Interscholastic Federation. In all instances, educational and school placement decisions shall be based on the best interests of the child and shall consider, among other factors, educational stability and the opportunity to be educated in the least restrictive educational setting necessary to achieve academic progress.

Section 48850
Enrollment of pupils in foster care or experiencing homelessness
(continued)

(2) A foster child who changes residences pursuant to a court order or decision of a child welfare worker or a homeless child or youth shall be immediately deemed to meet all residency requirements for participation in interscholastic sports or other extracurricular activities.

(3) (A) Pursuant to the federal McKinney-Vento Homeless Assistance Act (42 U.S.C. Sec. 11301 et seq.), public schools, including charter schools, and county offices of education shall immediately enroll a homeless child or youth seeking enrollment except where the enrollment would be in conflict with subdivision (e) of Section 47605.

(B) The department and the State Department of Social Services shall identify representatives from the department, the State Department of Social Services, and other state agencies that have experience in homeless youth issues to develop policies and practices to support homeless children and youths and to ensure that child abuse and neglect reporting requirements do not create barriers to the school enrollment and attendance of homeless children or youths, including, but not limited to, ensuring that a pupil who is a homeless child or youth is not reported to law enforcement by school personnel if the sole reason for the report is the pupil's homelessness. The selected representatives shall present the policies and practices to the Superintendent and the State Department of Social Services to be considered for implementation or dissemination, as appropriate.

(b) Every county office of education shall make available to agencies that place children in licensed children's institutions information on educational options for children residing in licensed children's institutions within the jurisdiction of the county office of education for use by the placing agencies in assisting parents and foster children to choose educational placements.

(c) For purposes of individuals with exceptional needs residing in licensed children's institutions, making a copy of the annual service plan, prepared pursuant to subdivision (b) of Section 56205, available to those special education local plan areas that have revised their local plans pursuant to Section 56836.03 shall meet the requirements of subdivision (b).

(d) For purposes of this section, the following definitions shall apply:

(1) "Homeless child or youth" and "homeless children and youths" as they are defined in Section 11434a(2) of Title 42 of the United States Code.

(2) "Pupils in foster care" has the same meaning as "foster child," as that term is defined in subdivision (b) of Section 48853.5.

Immediate enrollment of youth experiencing homelessness

Definitions

(a) As required pursuant to Section 11432(g)(6)(A)(i) of Title 42 of the United States Code, a local educational agency shall ensure that each school within the local educational agency identifies all homeless children and youths and unaccompanied youths enrolled at the school.

(b) (1) A local educational agency shall administer a housing questionnaire for purposes of identifying homeless children and youths and unaccompanied youths, as those terms are defined in Section 11434a(2) of Title 42 of the United States Code, in accordance with the federal McKinney-Vento Homeless Assistance Act (42 U.S.C. Sec. 11303 et seq.). Commencing no later than the beginning of the 2021–22 school year, a local educational agency shall ensure that the housing questionnaire is based on best practices developed by the department pursuant to subparagraph (A) of paragraph (1) of subdivision (f) of Section 48852.5. The housing questionnaire shall include an explanation of the rights and protections a pupil has as a homeless child or youth or as an unaccompanied youth. The housing questionnaire shall be available in paper form.

(2) A local educational agency shall annually provide the housing questionnaire described in paragraph (1) to all parents or guardians of pupils and to all unaccompanied youths of the local educational agency.

(3) If the primary language of a pupil's parent or guardian or an unaccompanied youth is not English, either of the following shall occur:

(A) The housing questionnaire shall be made available in the primary language of the unaccompanied youth or the pupil's parent or guardian pursuant to Section 48985.

(B) An appropriate translation of the housing questionnaire shall be provided upon request of a pupil's parent or guardian or an unaccompanied youth.

(4) A local educational agency shall collect the completed housing questionnaires that it administered pursuant to this section, and shall annually report to the department the number of homeless children and youths and unaccompanied youths enrolled.

(5) This subdivision shall only apply to local educational agencies receiving funding from the American Rescue Plan Elementary and Secondary School Emergency Relief - Homeless Children and Youth Fund pursuant to Section 2001(b)(1) of the federal American Rescue Plan Act of 2021 (Public Law 117-2).

Section 48851
Annual housing questionnaire

(a) As used in this section, "liaison" means a local educational agency liaison for homeless children and youths and unaccompanied youths designated pursuant to Section 11432(g)(1)(J)(ii) of Title 42 of the United States Code.

(b) A local educational agency shall establish homeless education program policies that are consistent with the provisions of this chapter and use resources developed by the department

Section 48851.3
Liaison for youth experiencing homelessness

LEA homeless education program policies

Section 48851.3
Liaison for youth experiencing homelessness
(continued)

Liaison duties; training

and posted on the department's internet website pursuant to Section 48852.5 and resources developed by homeless education technical assistance centers established using funding from the American Rescue Plan Act of 2021 (Public Law 117-2). The local educational agency shall update these policies at intervals that shall not exceed three years.

(c) A liaison shall do both of the following:

(1) (A) Offer training to local educational agency certificated and classified employees providing services to pupils experiencing homelessness, pursuant to Section 11432(g)(6)(A)(ix) of Title 42 of the United States Code, including, but not limited to, teachers, support staff, and other school staff who work with pupils, at least annually relating to both of the following:

(i) The homeless education program policies established under subdivision (b).

(ii) Recognition of signs that pupils are experiencing, or are at risk of experiencing, homelessness.

(B) A liaison is encouraged to offer the training described in subparagraph (A) to all local educational agency certificated and classified employees, including, but not limited to, teachers, support staff, and other school staff who work with pupils.

(2) Inform the employees described in subparagraphs (A) and (B) of paragraph (1) of the availability of training and the services the liaison provides to aid in the identification and provision of services to pupils who are experiencing, or are at risk of experiencing, homelessness.

Section 48851.5
Duties of liaison for experiencing homelessness: identification

Pursuant to Section 11432(g)(6) of Title 42 of the United States Code, a local educational agency liaison for homeless children and youths shall ensure that homeless children and youths are identified by school personnel through outreach and coordination activities with other entities and agencies and that homeless families and homeless children and youths receive referrals to health care services, dental services, mental health and substance abuse services, housing services, and other appropriate services.

Section 48852.3
Monitoring with schoolsite inspections

The department, to the extent possible within existing resources, shall develop and implement a plan for monitoring the compliance of local educational agencies with this chapter. The implementation of this risk-based monitoring plan shall include reviews of the local educational agencies that shall include, but not be limited to, schoolsite inspections to ensure that the state is not underestimating the number of youth experiencing homelessness.

Section 48852.5
Duties of liaison for youth experiencing homelessness: notice

(a) Pursuant to the federal McKinney-Vento Homeless Assistance Act (42 U.S.C. Sec. 11301 et seq.), a local educational agency liaison for homeless children and youths and unaccompanied youths designated pursuant to Section 11432(g)(1)(J)(ii) of Title 42 of the United States Code, shall ensure that public notice of the educational rights of homeless children and youths and unaccompanied youths is disseminated in schools within the liaison's local educational agency that provide services pursuant to the federal McKinney-Vento Homeless Assistance Act (42 U.S.C. Sec. 11301 et seq.).

(b) The department shall provide informational materials to local educational agency liaisons for homeless children and youths and unaccompanied youths regarding the educational rights of homeless children and youths and unaccompanied youths under state and federal law, updates and changes to state and federal law regarding the rights of homeless students, the responsibilities of local educational agency liaisons relating to homeless children and youths and unaccompanied youths, and the resources available to schools to assist homeless children and youths and unaccompanied youths.

(c) (1) The department shall provide training materials to local educational agency liaisons for homeless children and youths and unaccompanied youths to assist liaisons with providing professional development and other support to school personnel providing services pursuant to the federal McKinney-Vento Homeless Assistance Act. These materials are intended to support liaisons in meeting the requirements of the federal Every Student Succeeds Act, as specified in Section 11432(g)(6)(A)(ix) of Title 42 of the United States Code.

(2) The department shall develop and implement a system to verify that local educational agencies are providing the required training to school personnel providing services to youth experiencing homelessness at least annually.

(d) The department may use and adapt informational and training materials from state or national sources when applicable and appropriate.

(e) The department shall adopt policies and practices to ensure that local educational agency liaisons for homeless children and youths participate in professional development and other technical assistance programs that are deemed appropriate by the Superintendent in accordance with the federal Every Student Succeeds Act, as specified in Section 11432(g)(1)(J)(iv) of Title 42 of the United States Code.

(f) (1) The department shall develop and implement procedures for verifying key information submitted by local educational agencies to comply with the federal McKinney-Vento Homeless Education Assistance Improvements Act of 2001 (42 U.S.C. Sec. 11431 et seq.).

(2) The department shall review the information submitted by local educational agencies to

Section 48852.5
Duties of liaison for youth
experiencing homelessness; notice
(continued)

comply with the federal McKinney-Vento Homeless Education Assistance Improvements Act of 2001 (42 U.S.C. Sec. 11431 et seq.), and remind each local educational agency for which information about its policies is outdated to update their policies to reflect current requirements.

(g) (1) The department shall develop both of the following:

(A) Best practices that a local educational agency may use to identify and obtain accurate data on all homeless children and youths and unaccompanied youths enrolled in schools of the local educational agency. The department shall develop these best practices in accordance with the federal McKinney-Vento Homeless Assistance Act (42 U.S.C. Sec. 11301 et seq.) and in a manner informed by relevant guidance from experts on the identification of homeless children and youths and unaccompanied youths, including, but not limited to, the United States Department of Education and technical assistance centers sponsored by the Office of Safe and Healthy Students of the United States Department of Education. These best practices may include the distribution of information relating to the educational rights and resources of persons experiencing homelessness in public places that are frequently visited by homeless children and youths and unaccompanied youths.

(B) A model housing questionnaire, based on best practices developed pursuant to subparagraph (A), that a local educational agency may use to identify and obtain accurate data on all homeless children and youths and unaccompanied youths enrolled at schools of the local educational agency.

(2) The department shall post the best practices and model housing questionnaire developed pursuant to paragraph (1) on its internet website.

(h) Data collected by the department or by a local educational agency pursuant to this chapter shall be used in accordance with all state and federal laws regarding student privacy and the collection and use of student data.

(a) For purposes of this section, "liaison" means a local educational agency liaison for homeless children and youths and unaccompanied youths designated pursuant to Section 11432(g)(1)(J)(ii) of Title 42 of the United States Code.

(b) A school district, charter school, or county office of education shall create an internet web page or post on its internet website both of the following:

(1) A list of the liaisons in that school district, charter school, or county office of education, respectively, and the contact information for those liaisons.

(2) Specific information on homelessness, including, but not limited to, information regarding the educational rights and resources available to persons experiencing homelessness.

(c) If available, a school shall post on its internet website, if the school has an internet website, the contact information for the liaison. In addition, if a school has an employee or person under contract whose duties include assisting the liaison in completing the liaison's duties under Section 11432(g)(6) of Title 42 of the United States Code, the school shall post on its internet website, if the school has an internet website, the name and contact information for that employee or person under contract.

Section 48852.6
Website posting of information
regarding homelessness and
liaison

(a) At the point of any change or any subsequent change in residence once a child becomes a homeless child, the local educational agency serving the homeless child shall allow the homeless child to continue his or her education in the school of origin through the duration of homelessness.

(b) If the homeless child's status changes before the end of the academic year so that he or she is no longer homeless, either of the following apply:

(1) If the homeless child is in high school, the local educational agency shall allow the formerly homeless child to continue his or her education in the school of origin through graduation.

(2) If the homeless child is in kindergarten or any of grades 1 to 8, inclusive, the local educational agency shall allow the formerly homeless child to continue his or her education in the school of origin through the duration of the academic school year.

(c) To ensure that the homeless child has the benefit of matriculating with his or her peers in accordance with the established feeder patterns of school districts, the following apply:

(1) If the homeless child is transitioning between school grade levels, the local educational agency shall allow the homeless child to continue in the school district of origin in the same attendance area.

(2) If the homeless child is transitioning to a middle school or high school, and the school designated for matriculation is in another school district, the local educational agency shall allow the homeless child to continue to the school designated for matriculation in that school district.

(3) The new school shall immediately enroll the homeless child even if the child has outstanding fees, fines, textbooks, or other items or moneys due to the school last attended or is unable to produce clothing or records normally required for enrollment, such as previous academic records, medical records, including, but not limited to, records or other proof of immunization history pursuant to Chapter 1 (commencing with Section 120325) of Part 2 of Division 105 of the Health and Safety Code, proof of residency, other documentation, or school uniforms.

Section 48852.7
School of origin rights for
youth experiencing
homelessness

Section 48852.7
School of origin rights for
youth experiencing
homelessness

(continued)

(d) It is the intent of the Legislature that this section shall not supersede or exceed other laws governing special education services for eligible homeless children.

(e) (1) The federal McKinney-Vento Homeless Assistance Act (42 U.S.C. Sec. 11301 et seq.) shall govern the procedures for transportation and dispute resolution with respect to homeless children and school of origin.

(2) This section does not require a school district to provide transportation to a former homeless child who has an individualized education program that does not require transportation as a related service and who changes residence but remains in his or her school of origin pursuant to this section, unless the individualized education program team determines that transportation is a necessary related service, or the federal McKinney-Vento Homeless Assistance Act requires transportation to be provided.

(3) This section does not require a school district to provide transportation services to allow a homeless child to attend a school or school district, unless otherwise required under the federal McKinney-Vento Homeless Assistance Act or other federal law. A school district may, at its discretion, provide transportation services to allow a homeless child to attend a school or school district.

Definitions

(f) For purposes of this section, the following definitions apply:

(1) "Homeless child" has the same meaning as in Section 11434a(2) of Title 42 of the United States Code.

(2) "School of origin" means the school that the homeless child attended when permanently housed or the school in which the homeless child was last enrolled. If the school the homeless child attended when permanently housed is different from the school in which the homeless child was last enrolled, or if there is some other school that the homeless child attended with which the homeless child is connected and that the homeless child attended within the immediately preceding 15 months, the educational liaison, in consultation with, and with the agreement of, the homeless child and the person holding the right to make educational decisions for the homeless child, shall determine, in the best interests of the homeless child, the school that shall be deemed the school of origin.

Section 48853.5
Liaison for foster youth

(a) This section applies to a foster child. "Foster child" means any of the following:

(1) A child who has been removed from their home pursuant to Section 309 of the Welfare and Institutions Code.

(2) A child who is the subject of a petition filed under Section 300 or 602 of the Welfare and Institutions Code, whether or not the child has been removed from their home.

(3) A dependent child of the court of an Indian tribe, consortium of tribes, or tribal organization who is the subject of a petition filed in the tribal court pursuant to the tribal court's jurisdiction in accordance with the tribe's law.

(4) A child who is the subject of a voluntary placement agreement, as defined in subdivision (p) of Section 11400 of the Welfare and Institutions Code.

(b) The department, in consultation with the California Foster Youth Education Task Force, shall develop a standardized notice of the educational rights of foster children, as specified in Sections 48850 to this section, inclusive, and Sections 48911, 48915.5, 49069.5, 49076, 51225.1, and 51225.2. The notice shall include complaint process information, as applicable. The department shall make the notice available to educational liaisons for foster children for dissemination by posting the notice on its internet website. Any version of this notice prepared for use by foster children shall also include, to the greatest extent practicable, the rights established pursuant to Section 16001.9 of the Welfare and Institutions Code. In developing the notice that includes the rights in Section 16001.9 of the Welfare and Institutions Code, the department shall consult with the Office of the State Foster Care Ombudsperson.

Duties of liaison for foster youth

(c) Each local educational agency shall designate a staff person as the educational liaison for foster children. In a school district that operates a foster children services program pursuant to Chapter 11.3 (commencing with Section 42920) of Part 24 of Division 3, the educational liaison shall be affiliated with the local foster children services program. The educational liaison shall do both of the following:

(1) Ensure and facilitate the proper educational placement, enrollment in school, and checkout from school of foster children.

(2) Assist foster children when transferring from one school to another school or from one school district to another school district in ensuring proper transfer of credits, records, and grades.

(d) A foster child's educational rights holder, attorney, and county social worker and an Indian child's, as defined in Section 224.1 of the Welfare and Institutions Code, tribal social worker and, if applicable, county social worker shall have the same rights a parent or guardian of a child has to receive a suspension notice, expulsion notice, manifestation determination notice, involuntary transfer notice, and other documents and related information.

(e) This section does not grant authority to the educational liaison that supersedes the authority

granted under state and federal law to a parent or legal guardian retaining educational rights, a responsible adult appointed by the court to represent the child pursuant to Section 361 or 726 of the Welfare and Institutions Code, a surrogate parent, or a foster parent exercising the authority granted under Section 56055. The role of the educational liaison is advisory with respect to placement decisions and determination of the school of origin.

(f) (1) At the initial detention or placement, or any subsequent change in placement of a foster child, the local educational agency serving the foster child shall allow the foster child to continue the foster child's education in the school of origin for the duration of the jurisdiction of the court.

(2) If the jurisdiction of the court is terminated before the end of an academic year, the local educational agency shall allow a former foster child who is in kindergarten or any of grades 1 to 8, inclusive, to continue the former foster child's education in the school of origin through the duration of the academic school year.

(3) (A) If the jurisdiction of the court is terminated while a foster child is in high school, the local educational agency shall allow the former foster child to continue the former foster child's education in the school of origin through graduation.

(B) For purposes of this paragraph, a school district is not required to provide transportation to a former foster child who has an individualized education program that does not require transportation as a related service and who changes residence but remains in the former foster child's school of origin pursuant to this paragraph, unless the individualized education program team determines that transportation is a necessary related service.

(4) To ensure that the foster child has the benefit of matriculating with the foster child's peers in accordance with the established feeder patterns of school districts, if the foster child is transitioning between school grade levels, the local educational agency shall allow the foster child to continue in the school district of origin in the same attendance area, or, if the foster child is transitioning to a middle school or high school, and the school designated for matriculation is in another school district, to the school designated for matriculation in that school district.

(5) (A) Paragraphs (2), (3), and (4) do not require a school district to provide transportation services to allow a foster child to attend a school or school district, unless there is an agreement with a local child welfare agency that the school district assumes part or all of the transportation costs in accordance with Section 6312(c)(5) of Title 20 of the United States Code, or unless otherwise required under federal law. This paragraph does not prohibit a school district from, at its discretion, providing transportation services to allow a foster child to attend a school or school district.

(B) In accordance with Section 6312(c)(5) of Title 20 of the United States Code, local educational agencies shall collaborate with local child welfare agencies to develop and implement clear written procedures to address the transportation needs of foster youth to maintain them in their school of origin, when it is in the best interest of the foster youth.

(6) The educational liaison, in consultation with, and with the agreement of, the foster child and the person holding the right to make educational decisions for the foster child, may recommend, in accordance with the foster child's best interests, that the foster child's right to attend the school of origin be waived and the foster child be enrolled in a public school that pupils living in the attendance area in which the foster child resides are eligible to attend.

(7) Before making a recommendation to move a foster child from the foster child's school of origin, the educational liaison shall provide the foster child and the person holding the right to make educational decisions for the foster child with a written explanation stating the basis for the recommendation and how the recommendation serves the foster child's best interests.

(8) (A) If the educational liaison, in consultation with the foster child and the person holding the right to make educational decisions for the foster child, agrees that the best interests of the foster child would best be served by the foster child's transfer to a school other than the school of origin, the foster child shall immediately be enrolled in the new school.

(B) The new school shall immediately enroll the foster child even if the foster child has outstanding fees, fines, textbooks, or other items or moneys due to the school last attended or is unable to produce clothing or records normally required for enrollment, such as previous academic records, medical records, including, but not limited to, records or other proof of immunization history pursuant to Chapter 1 (commencing with Section 120325) of Part 2 of Division 105 of the Health and Safety Code, proof of residency, other documentation, or school uniforms.

(C) Within two business days of the foster child's request for enrollment, the educational liaison for the new school shall contact the school last attended by the foster child to obtain all academic and other records. The last school attended by the foster child shall provide all required records to the new school regardless of any outstanding fees, fines, textbooks, or other items or moneys owed to the school last attended. The educational liaison for the school last attended shall provide all records to the new school within two business days of receiving the request.

(9) If a dispute arises regarding the request of a foster child to remain in the school of origin, the foster child has the right to remain in the school of origin pending resolution of the dispute. The dispute shall be resolved in accordance with the existing dispute resolution process available to a pupil served by the local educational agency.

School of origin rights for foster youth

Immediate enrollment of foster youth

Section 48853.5
Liaison for foster youth
(continued)

Definition of school of origin

(10) The local educational agency and the county placing agency are encouraged to collaborate to ensure maximum use of available federal moneys, explore public-private partnerships, and access any other funding sources to promote the well-being of foster children through educational stability.

(11) It is the intent of the Legislature that this subdivision shall not supersede or exceed other laws governing special education services for eligible foster children.

(g) For purposes of this section, "school of origin" means the school that the foster child attended when permanently housed or the school in which the foster child was last enrolled. If the school the foster child attended when permanently housed is different from the school in which the foster child was last enrolled, or if there is some other school that the foster child attended within the immediately preceding 15 months, the educational liaison, in consultation with, and with the agreement of, the foster child and the person holding the right to make educational decisions for the foster child, shall determine, in the best interests of the foster child, the school that shall be deemed the school of origin.

(h) This section does not supersede other law governing the educational placements in juvenile court schools, as described in Section 48645.1, by the juvenile court under Section 602 of the Welfare and Institutions Code.

(i) (1) A complaint of noncompliance with the requirements of this section may be filed with the local educational agency under the Uniform Complaint Procedures set forth in Chapter 5.1 (commencing with Section 4600) of Division 1 of Title 5 of the California Code of Regulations.

(2) A complainant not satisfied with the decision of a local educational agency may appeal the decision to the department pursuant to Chapter 5.1 (commencing with Section 4600) of Division 1 of Title 5 of the California Code of Regulations and shall receive a written decision regarding the appeal within 60 days of the department's receipt of the appeal.

(3) If a local educational agency finds merit in a complaint, or if the Superintendent finds merit in an appeal, the local educational agency shall provide a remedy to the affected pupil.

(4) Information regarding the requirements of this section shall be included in the annual notification distributed to, among others, pupils, parents or guardians of pupils, employees, and other interested parties pursuant to Section 4622 of Title 5 of the California Code of Regulations.

Section 48852.6
Website posting
of liaison information

(a) For purposes of this section, "liaison" means a local educational agency liaison for homeless children and youths and unaccompanied youths designated pursuant to Section 11432(g)(1)(J)(ii) of Title 42 of the United States Code.

(b) A school district, charter school, or county office of education shall create an internet web page or post on its internet website both of the following:

(1) A list of the liaisons in that school district, charter school, or county office of education, respectively, and the contact information for those liaisons.

(2) Specific information on homelessness, including, but not limited to, information regarding the educational rights and resources available to persons experiencing homelessness.

(c) If available, a school shall post on its internet website, if the school has an internet website, the contact information for the liaison. In addition, if a school has an employee or person under contract whose duties include assisting the liaison in completing the liaison's duties under Section 11432(g)(6) of Title 42 of the United States Code, the school shall post on its internet website, if the school has an internet website, the name and contact information for that employee or person under contract.

STUDENT DISCIPLINE
Education Code

Section 48900.5
Suspension for racist bullying,
harassment or intimidation

(a) Suspension, including supervised suspension as described in Section 48911.1, shall be imposed only when other means of correction fail to bring about proper conduct. A school district may document the other means of correction used and place that documentation in the pupil's record, which may be accessed pursuant to Section 49069.7. However, a pupil, including an individual with exceptional needs, as defined in Section 56026, may be suspended, subject to Section 1415 of Title 20 of the United States Code, for any of the reasons enumerated in Section 48900 upon a first offense, if the principal or superintendent of schools determines that the pupil violated subdivision (a), (b), (c), (d), or (e) of Section 48900 or that the pupil's presence causes a danger to persons.

(b) Other means of correction include, but are not limited to, the following:

(1) A conference between school personnel, the pupil's parent or guardian, and the pupil.

(2) Referrals to the school counselor, psychologist, social worker, child welfare attendance personnel, or other school support service personnel for case management and counseling.

Section 48900.5
Suspension for racist bullying, harassment or intimidation
(continued)

(3) Study teams, guidance teams, resource panel teams, or other intervention-related teams that assess the behavior, and develop and implement individualized plans to address the behavior in partnership with the pupil and the pupil's parents.

(4) Referral for a comprehensive psychosocial or psychoeducational assessment, including for purposes of creating an individualized education program, or a plan adopted pursuant to Section 504 of the federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794(a)).

(5) Enrollment in a program for teaching prosocial behavior or anger management.

(6) Participation in a restorative justice program.

(7) A positive behavior support approach with tiered interventions that occur during the schoolday on campus.

(8) After school programs that address specific behavioral issues or expose pupils to positive activities and behaviors, including, but not limited to, those operated in collaboration with local parent and community groups.

(9) Any of the alternatives described in Section 48900.6.

(c) For a pupil who has been suspended, or for whom other means of correction have been implemented pursuant to subdivision (b), for an incident of racist bullying, harassment, or intimidation, local educational agencies are encouraged to have both the victim and perpetrator engage in a restorative justice practice that is found to suit the needs of both the victim and the perpetrator. Local educational agencies are encouraged to regularly check on the victim of racist bullying, harassment, or intimidation to ensure that the victim is not in danger of suffering from long-lasting mental health issues. Local educational agencies are encouraged to require perpetrators to engage in culturally sensitive programs that promote racial justice and equity and combat racism and ignorance.

Notwithstanding Section 47610 or any other law, the following provisions apply to charter schools:

(a) A pupil enrolled in a charter school in kindergarten or any of grades 1 to 5, inclusive, shall not be suspended on the basis of having disrupted school activities or otherwise willfully defied the valid authority of supervisors, teachers, administrators, school officials, or other school personnel engaged in the performance of their duties, and those acts shall not constitute grounds for a pupil enrolled in a charter school in kindergarten or any of grades 1 to 12, inclusive, to be recommended for expulsion.

(b) A pupil enrolled in a charter school in any of grades 6 to 8, inclusive, shall not be suspended on the basis of having disrupted school activities or otherwise willfully defied the valid authority of supervisors, teachers, administrators, school officials, or other school personnel engaged in the performance of their duties. This subdivision is inoperative on July 1, 2029.

(c) Except as provided in Section 48910, commencing July 1, 2024, a pupil enrolled in a charter school in any of grades 9 to 12, inclusive, shall not be suspended for any of the acts specified in paragraph (1). This paragraph is inoperative on July 1, 2029.

(d) (1) A certificated or noncertificated employee may refer a pupil to charter school administrators for appropriate and timely in-school interventions or supports from the list specified in subdivision (b) of Section 48900.5 for any of the acts enumerated in paragraph (1).

(2) A charter school administrator shall, within five business days, document the actions taken pursuant to paragraph (1) and place that documentation in the pupil's record to be available for access, to the extent permissible under state and federal law, pursuant to Section 49069.7. The charter school administrator shall, by the end of the fifth business day, also inform the referring certificated or noncertificated employee, verbally or in writing, what actions were taken and, if none, the rationale used for not providing any appropriate or timely in-school interventions or supports.

(a) The governing body of a school district, a county office of education, or a charter school may adopt a policy to limit or prohibit the use by its pupils of smartphones while the pupils are at a schoolsite or while the pupils are under the supervision and control of an employee or employees of that school district, county office of education, or charter school.

(b) Notwithstanding subdivision (a), a pupil shall not be prohibited from possessing or using a smartphone under any of the following circumstances:

(1) In the case of an emergency, or in response to a perceived threat of danger.

(2) When a teacher or administrator of the school district, county office of education, or charter school grants permission to a pupil to possess or use a smartphone, subject to any reasonable limitation imposed by that teacher or administrator.

(3) When a licensed physician and surgeon determines that the possession or use of a smartphone is necessary for the health or well-being of the pupil.

(4) When the possession or use of a smartphone is required in a pupil's individualized education program.

Section 48901.1
Restrictions on suspension and expulsion for willful defiance
Grades kindergarten to 5

Grades 1 to 12

Grades 6 to 8

Section 48901.7
Limits on smart phone use

Permitted uses

Section 48913.5
Suspension procedures;
homework assignments

- (a) Upon the request of a parent, a legal guardian or other person holding the right to make educational decisions for the pupil, or the affected pupil, a teacher shall provide to a pupil in any of grades 1 to 12, inclusive, who has been suspended from school for two or more schooldays the homework that the pupil would otherwise have been assigned.
- (b) If a homework assignment that is requested pursuant to subdivision (a) and turned into the teacher by the pupil either upon the pupil's return to school from suspension or within the timeframe originally prescribed by the teacher, whichever is later, is not graded before the end of the academic term, that assignment shall not be included in the calculation of the pupil's overall grade in the class.

Section 49414.4
Restorative justice framework

- (a) It is the intent of the Legislature that, as part of a restorative justice framework, a school use alternatives to a referral of a pupil to a law enforcement agency in response to an incident involving the pupil's misuse of an opioid, to the extent not in conflict with any other law requiring that referral.
- (b) It is further the intent of the Legislature that the Multi-Tiered System of Supports, which includes restorative justice practices, trauma-informed practices, social and emotional learning, and schoolwide positive behavior interventions and support, may be used to achieve the alternatives described in subdivision (a), in order to help pupils gain critical social and emotional skills, receive support to help transform trauma-related responses, understand the impact of their actions, and develop meaningful methods for repairing harm to the school community.

FREE SPEECH
Education Code

Section 48907
Student freedom of speech
and freedom of the press

- (a) Pupils of the public schools, including charter schools, shall have the right to exercise freedom of speech and of the press including, but not limited to, the use of bulletin boards, the distribution of printed materials or petitions, the wearing of buttons, badges, and other insignia, and the right of expression in official publications, whether or not the publications or other means of expression are supported financially by the school or by use of school facilities, except that expression shall be prohibited which is obscene, libelous, or slanderous. Also prohibited shall be material that so incites pupils as to create a clear and present danger of the commission of unlawful acts on school premises or the violation of lawful school regulations, or the substantial disruption of the orderly operation of the school.
- (b) The governing board or body of each school district or charter school and each county board of education shall adopt rules and regulations in the form of a written publications code, which shall include reasonable provisions for the time, place, and manner of conducting such activities within its respective jurisdiction.
- (c) Pupil editors of official school publications shall be responsible for assigning and editing the news, editorial, and feature content of their publications subject to the limitations of this section. However, it shall be the responsibility of a journalism adviser or advisers of pupil publications within each school to supervise the production of the pupil staff, to maintain professional standards of English and journalism, and to maintain the provisions of this section.
- (d) There shall be no prior restraint of material prepared for official school publications except insofar as it violates this section. School officials shall have the burden of showing justification without undue delay prior to a limitation of pupil expression under this section.
- (e) "Official school publications" refers to material produced by pupils in the journalism, newspaper, yearbook, or writing classes and distributed to the student body either free or for a fee.
- (f) This section does not prohibit or prevent the governing board or body of a school district or charter school from adopting otherwise valid rules and regulations relating to oral communication by pupils upon the premises of each school.
- (g) An employee shall not be dismissed, suspended, disciplined, reassigned, transferred, or otherwise retaliated against solely for acting to protect a pupil engaged in the conduct authorized under this section, or refusing to infringe upon conduct that is protected by this section, the First Amendment to the United States Constitution, or Section 2 of Article I of the California Constitution.

Section 48950
Student freedom of speech;
remedies; attorney's fees;
retaliation prohibited

- (a) A school district operating one or more high schools, a charter school, or a private secondary school shall not make or enforce a rule subjecting a high school pupil to disciplinary sanctions solely on the basis of conduct that is speech or other communication that, when engaged in outside of the campus, is protected from governmental restriction by the First Amendment to the United States Constitution or Section 2 of Article I of the California Constitution.
- (b) A pupil who is enrolled in a school at the time that the school has made or enforced a rule in violation of subdivision (a) may commence a civil action to obtain appropriate injunctive and declaratory relief as determined by the court. Upon motion, a court may award attorney's fees to a prevailing plaintiff in a civil action pursuant to this section.
- (c) This section does not apply to a private secondary school that is controlled by a religious organization, to the extent that the application of this section would not be consistent with the religious tenets of the organization.

Section 48950
Student freedom of speech;
remedies; attorney's fees;
retaliation prohibited
(continued)

- (d) This section does not prohibit the imposition of discipline for harassment, threats, or intimidation, unless constitutionally protected.
- (e) This section does not supersede, or otherwise limit or modify, the provisions of Section 48907.
- (f) The Legislature finds and declares that free speech rights are subject to reasonable time, place, and manner regulations.
- (g) An employee shall not be dismissed, suspended, disciplined, reassigned, transferred, or otherwise retaliated against solely for acting to protect a pupil engaged in conduct authorized under this section, or refusing to infringe upon conduct that is protected by this section, the First Amendment to the United States Constitution, or Section 2 of Article I of the California Constitution.

SYNTHETIC DRUGS
Education Code

- (a) A local educational agency shall inform the parents or guardians of each enrolled pupil about the dangers associated with using synthetic drugs that are not prescribed by a physician, such as fentanyl. Parents or guardians shall also be informed of the possibility that dangerous synthetic drugs can be found in counterfeit pills.
- (b) (1) The information shall be annually provided to parents or guardians at the beginning of the first semester or quarter of the regular school term.
- (2) The information may be provided to parents or guardians pursuant to Section 48980.
- (c) If a local educational agency maintains an internet website, the local educational agency shall post the information on their internet website and shall ensure that each individual school within the local educational agency that maintains an individual internet website also posts the information on that school's internet website.
- (d) As used in this section, a "local educational agency" means a school district, county office of education, or charter school.

Section 48985.5
Information required to be
provided

FIREARM SAFETY LAWS
Education Code

- (a) (1) A local educational agency shall inform, through a notice in the manner prescribed in this section, the parents or guardians of each enrolled pupil of California's child access prevention laws and laws relating to the safe storage of firearms, including, but not limited to, Division 4 (commencing with Section 25000) of Title 4 of Part 6 of the Penal Code.
- (2) The notice shall be provided annually at the beginning of the first semester or quarter of the regular school term.
- (3) The notice shall be informed by the most updated model language developed pursuant to subdivision (c).
- (b) (1) The notice described in subdivision (a) shall be made using any of the methods described in Section 48981 that apply and may be provided as a single notice for multiple pupils living in the same household.
- (2) A school district shall provide the notice as part of the annual notification required pursuant to Section 48980.
- (c) (1) On or before July 1, 2023, the department shall develop, in consultation with the Department of Justice, model language for the notice described in subdivision (a).
- (2) On or before July 1, 2024, and each July 1 thereafter, the department shall update as necessary for any change in the law, in consultation with the Department of Justice, the model language developed pursuant to paragraph (1).
- (3) The department shall share the model language developed and updated pursuant to paragraphs (1) and (2) in both of the following manners:
- (A) With all local educational agencies for the purposes described in subdivision (a).
- (B) Upon request, with any private school for distribution or potential distribution by the private school.
- (d) A local educational agency, a private school, and the department are immune from civil liability for any damages allegedly caused by, arising out of, or relating to the notice if the entity provided the notice using the model language provided to it by the department.
- (e) For purposes of this section, the following definitions apply:
- (1) "Local educational agency" means a school district, county office of education, or charter school.
- (2) "Private school" means a person, firm, association, partnership, or corporation offering or conducting private school instruction in the state.
- (3) "Private school instruction" means instruction at the elementary or high school level for one or more pupils who are 6 to 18 years of age, inclusive. Private school instruction includes, but is not limited to, instruction by conventional or traditional private schools, private school satellite programs, private online or virtual schools, and certified nonpublic nonsectarian schools.

Section 48986
Firearm safety laws

Section 48986
Firearm safety laws
(continued)

- (f) (1) If a local educational agency provides a notice required by Section 49392, the local educational agency shall be deemed to have complied with the requirements of subdivisions (a) and (b), as applicable.
- (2) If the department develops model language pursuant to Section 49391, the department shall be deemed to have complied with the requirements of subdivision (c).
- (3) This subdivision shall only become operative if Senate Bill 906 of the 2021–22 Regular Session is enacted and becomes effective on or before January 1, 2023, and adds Sections 49391 and 49392 to the Education Code.

PUPIL RESTRAINT AND SECLUSION
Education Code

Section 49006
Reporting pupil restraint and seclusion

- (a) A local educational agency that meets the definition of a “local educational agency” specified in Section 300.28 of Title 34 of the Code of Federal Regulations shall collect and, no later than three months after the end of a school year, report to the department annually on the use of behavioral restraints and seclusion for pupils enrolled in or served by the local educational agency for all or part of the prior school year.
- (b) The report required pursuant to subdivision (a) shall include all of the following information, disaggregated by race or ethnicity, and gender:
- (1) The number of pupils subjected to mechanical restraint, with separate counts for pupils with a plan pursuant to Section 504 of the federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794), pupils with an individualized education program, and pupils who do not have a plan pursuant to Section 504 of the federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794) or an individualized education program.
- (2) The number of pupils subjected to physical restraint, with separate counts for pupils with a plan pursuant to Section 504 of the federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794), pupils with an individualized education program, and pupils who do not have a plan pursuant to Section 504 of the federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794) or an individualized education program.
- (3) The number of pupils subjected to seclusion, with separate counts for pupils with a plan pursuant to Section 504 of the federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794), pupils with an individualized education program, and pupils who do not have a plan pursuant to Section 504 of the federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794) or an individualized education program.
- (4) The number of times mechanical restraint was used on pupils, with separate counts for the number of times mechanical restraint was used on pupils with a plan pursuant to Section 504 of the federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794), pupils with an individualized education program, and pupils who do not have a plan pursuant to Section 504 of the federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794) or an individualized education program.
- (5) The number of times physical restraint was used on pupils, with separate counts for the number of times physical restraint was used on pupils with a plan pursuant to Section 504 of the federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794), pupils with an individualized education program, and pupils who do not have a plan pursuant to Section 504 of the federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794) or an individualized education program.
- (6) The number of times seclusion was used on pupils, with separate counts for the number of times seclusion was used on pupils with a plan pursuant to Section 504 of the federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794), pupils with an individualized education program, and pupils who do not have a plan pursuant to Section 504 of the federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794) or an individualized education program.
- (c) Notwithstanding any other law, the data collected and reported pursuant to this section shall be available as a public record pursuant to Division 10 (commencing with Section 7920.000) of Title 1 of the Government Code, and shall be posted annually on the internet website of the local educational agency.
- (d) No later than three months after the report is due to the department pursuant to subdivision (a), the department shall post the data from the report annually on its internet website.

PUPIL FEES
Education Code

Section 49010
Definitions

- For purposes of this article, the following terms have the following meanings:
- (a) “Educational activity” means an activity offered by a school, school district, charter school, or county office of education that constitutes an integral fundamental part of elementary and secondary education, including, but not limited to, curricular and extracurricular activities.
- (b) “Pupil fee” means a fee, deposit, or other charge imposed on pupils, or a pupil’s parents or guardians, in violation of Section 49011 and Section 5 of Article IX of the California Constitution, which require educational activities to be provided free of charge to all pupils without regard to

Section 49010

Definitions

(continued)

their families' ability or willingness to pay fees or request special waivers, as provided for in *Hartzell v. Connell* (1984) 35 Cal.3d 899. A pupil fee includes, but is not limited to, all of the following:

- (1) A fee charged to a pupil as a condition for registering for school or classes, or as a condition for participation in a class or an extracurricular activity, regardless of whether the class or activity is elective or compulsory, or is for credit.
- (2) A security deposit, or other payment, that a pupil is required to make to obtain a lock, locker, book, class apparatus, musical instrument, uniform, or other materials or equipment.
- (3) A purchase that a pupil is required to make to obtain materials, supplies, equipment, or uniforms associated with an educational activity.

(a) A pupil enrolled in a public school shall not be required to pay a pupil fee for participation in an educational activity.

(b) All of the following requirements apply to the prohibition identified in subdivision (a):

- (1) All supplies, materials, and equipment needed to participate in educational activities shall be provided to pupils free of charge.
- (2) A fee waiver policy shall not make a pupil fee permissible.
- (3) School districts and schools shall not establish a two-tier educational system by requiring a minimal educational standard and also offering a second, higher educational standard that pupils may only obtain through payment of a fee or purchase of additional supplies that the school district or school does not provide.
- (4) A school district or school shall not offer course credit or privileges related to educational activities in exchange for money or donations of goods or services from a pupil or a pupil's parents or guardians, and a school district or school shall not remove course credit or privileges related to educational activities, or otherwise discriminate against a pupil, because the pupil or the pupil's parents or guardians did not or will not provide money or donations of goods or services to the school district or school.

(c) This article shall not be interpreted to prohibit solicitation of voluntary donations of funds or property, voluntary participation in fundraising activities, or school districts, schools, and other entities from providing pupils prizes or other recognition for voluntarily participating in fundraising activities.

(d) This article applies to all public schools, including, but not limited to, charter schools and alternative schools.

(e) This article is declarative of existing law and shall not be interpreted to prohibit the imposition of a fee, deposit, or other charge otherwise allowed by law.

(a) A complaint of noncompliance with the requirements of this article may be filed with the principal of a school under the Uniform Complaint Procedures set forth in Chapter 5.1 (commencing with Section 4600) of Division 1 of Title 5 of the California Code of Regulations.

(b) A complaint may be filed anonymously if the complaint provides evidence or information leading to evidence to support an allegation of noncompliance with the requirements of this article.

(c) A complainant not satisfied with the decision of a public school may appeal the decision to the department and shall receive a written appeal decision within 60 days of the department's receipt of the appeal.

(d) If a public school finds merit in a complaint, or the department finds merit in an appeal, the public school shall provide a remedy to all affected pupils, parents, and guardians that, where applicable, includes reasonable efforts by the public school to ensure full reimbursement to all affected pupils, parents, and guardians, subject to procedures established through regulations adopted by the state board.

(e) Information regarding the requirements of this article shall be included in the annual notification distributed to pupils, parents and guardians, employees, and other interested parties pursuant to Section 4622 of Title 5 of the California Code of Regulations

(f) Public schools shall establish local policies and procedures to implement the provisions of this section on or before March 1, 2013.

(a) A pupil or former pupil, unless emancipated at the time the debt is incurred, shall not owe or be billed for a debt owed to a public school or school district.

(b) A public school or school district shall not, because of a debt owed to the public school or school district, take negative action against a pupil or former pupil, including, but not limited to, all of the following:

- (1) Denying full credit for any assignments for a class.
- (2) Denying full and equal participation in classroom activity.
- (3) Denying access to on-campus educational facilities, including, but not limited to, the library.
- (4) Denying or withholding grades or transcripts.
- (5) Denying or withholding a diploma.
- (6) Limiting or barring participation in an extracurricular activity, club, or sport.
- (7) Limiting or excluding from participation in an educational activity, field trip, or school ceremony.

Section 49011

No pupil fees for participation in educational activities

All supplies, materials and equipment free of charge
No fee waivers
No two-tier system

No special treatment or discrimination

May solicit voluntary donations

Section 49013

Complaints of noncompliance subject to UCP

Section 49014

Pupil debt

Section 49014

Pupil debt

(continued)

(c)(1) A public school or school district shall provide an itemized invoice for any amount owed by the parent or guardian on behalf of a pupil or former pupil before pursuing payment of the debt and shall provide a receipt to the parent or guardian of a pupil or former pupil for each payment made to the public school or school district for any amount owed by the parent or guardian on behalf of the pupil or former pupil.

(2) The invoice required in paragraph (1) shall include references to school policies relating to debt collection and the rights established in this section and Section 49557.5.

(d) Except as provided in subdivision (g), a debt collector, as defined in Section 803 of the federal Fair Debt Collection Practices Act (15 U.S.C. Sec. 1692a), shall not report a debt owed by a parent or guardian to a credit reporting agency if the debt collector is contracted with a public school or school district for the purpose of pursuing the repayment of a debt owed by a parent or guardian of a pupil or former pupil.

(e) A public school or school district shall not sell debt owed by a parent or guardian of a pupil or former pupil.

(f) Any waiver by a parent, guardian, pupil, or former pupil of the provisions of this section is contrary to public policy and shall be unenforceable and void.

(g)(1) This section shall not apply to debt owed as a result of vandalism or to cover the replacement cost of public school or school district books, supplies, or property loaned to a pupil that the pupil fails to return or that are willfully cut, defaced, or otherwise injured. A public school or school district may offer a pupil or former pupil, with the permission of the parent or guardian of the pupil or former pupil, alternative, nonmonetary forms of compensation to settle debt described in this paragraph. Alternatives that include service or work in exchange for repayment of a debt shall comply with all provisions of the Labor Code, including those sections relating to youth employment.

(2) Paragraph (1) shall not apply if the pupil is a current or former homeless child or youth or a current or former foster youth.

(h) For purposes of this section, the following terms have the following meanings:

(1) "Foster youth" has the same meaning as in Section 42238.01

(2) "Homeless child or youth" has the same meaning as "homeless children and youths" in Section 11434a(2) of Title 42 of the United States Code.

(3) "Public school" includes the state special schools, as described in subdivision (a) of Section 48927, charter schools, schools operated by a county office of education, and schools within a school district.

(4) "School district" means a school district or county office of education.

RECESS

Education Code

Section 49056

Recess requirements

(beginning in school year 2024-25)

(a) Commencing with the 2024–25 school year, all of the following shall apply to recess provided by a public school:

(1) (A) Recess shall be at least 30 minutes on regular instructional days and at least 15 minutes on early release days and may be provided in one or more periods.

(B) The requirement pursuant to subparagraph (A) does not apply to days in which there is a field trip or other educational program.

(2) Recess shall be held outdoors whenever the weather and air quality permits. If outdoor space is not sufficient, recess may be held indoors.

(3) Recess shall comply with a pupil's individualized education program or pupil's plan pursuant to Section 504 of the federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794).

(4) (A) A pupil shall not be denied recess by a member of the school's staff unless the pupil's participation poses an immediate threat to the physical safety of the pupil or to the physical safety of one or more of the pupil's peers.

(B) If a pupil's recess period is denied pursuant to subparagraph (A), school staff members shall make all reasonable efforts to resolve such threats and minimize exclusion from recess to the greatest extent practicable. School staff members are encouraged to use other means of correction, such as those specified in subdivision (b) of Section 48900.5.

(b) This section does not prohibit a public school from providing pupils with a snack during recess.

(c) For purposes of this section, the following definitions apply:

(1) "Educational program" means the entire school-sponsored offering for pupils, including in-class and out-of-class activities.

(2) "Public school" means a school that is operated by a school district or county office of education, or a charter school.

(3) "Recess" means a period of time during the schoolday, separate and distinct from physical education courses and meal times, but may follow or precede physical education courses or meal times, when pupils are given supervised and unstructured time for any of the following:

(A) Physical activity.

(B) Play.

(C) Organized games.

(D) Social engagement with peers.

TRANSFER OF PUPIL RECORDS

Education Code

(a) The Legislature finds and declares that the academic record of a transferring pupil is essential to the pupil's placement, academic success, and timely graduation. The Legislature further finds and declares that an accurate, updated pupil record enhances school safety, academic achievement, and pupil welfare when the record of a transferring pupil includes transcripts, immunization records, and, when applicable, suspension notices, expulsion records, and individualized education programs.

(b) If a pupil transfers from one public school to another or to a private school, or transfers from a private school to a public school within the state, the pupil's permanent record or a copy of it shall be transferred by the former public school or private school no later than 10 schooldays following the date the request is received from the public school or private school where the pupil intends to enroll.

(c) As used in this section, "schoolday" means a day upon which the school is in session or nonholiday weekdays during the summer break.

(d) A public school requesting a transfer of a record pursuant to this section shall notify the parent of his or her right to receive a copy of the record and a right to a hearing to challenge the content of the record.

(e) The state board may adopt rules and regulations concerning the transfer of records.

(f) Nothing in this section shall supersede any other state or federal law governing the transfer of pupil records for specific pupil populations, including, but not limited to, Sections 49069.5 and 56043.

Section 49068

Transfer of pupil academic records; time limits; rights of parents

PRIVACY OF PUPIL RECORDS

Education Code

For purposes of this article, the following definitions apply:

(a) "California Cybersecurity Integration Center" or "Center" means the California Cybersecurity Integration Center established by the Office of Emergency Services pursuant to Section 8586.5 of the Government Code.

(b) "Cyberattack" means either of the following:

(1) Any alteration, deletion, damage, or destruction of a computer system, computer network, computer program, or data caused by unauthorized access.

(2) The unauthorized denial of access to legitimate users of a computer system, computer network, computer program, or data.

(c) "Local educational agency" means a school district, county office of education, or charter school.

(a) A local educational agency shall report any cyberattack impacting more than 500 pupils or personnel to the California Cybersecurity Integration Center.

(b) (1) The California Cybersecurity Integration Center shall establish a database that tracks reports of cyberattacks submitted by local educational agencies pursuant to this section. The Center shall annually, by January 1, provide a report to the Governor and the relevant policy committees of the Legislature summarizing the types and number of cyberattacks on local educational agencies, the types and number of data breaches affecting local educational agencies that have been reported to the Attorney General pursuant to Sections 1798.29 and 1798.82 of the Civil Code, any activities provided by the Center to prevent cyberattacks or data breaches of a local educational agency, and support provided by the Center following a cyberattack or data breach of a local educational agency.

(2) The Attorney General shall share sample copies of data breach notifications received from local educational agencies pursuant to Sections 1798.29 and 1798.82 of the Civil Code, excluding any personally identifiable information, with the Center for the purpose of compiling this report.

(c) Nothing in this section shall be construed to affect any disclosure or notification requirements pursuant to Sections 1798.29 and 1798.82 of the Civil Code.

Section 35265

Cyberattack reporting; definitions

Section 35266

Cyberattack reporting requirements

(a) A local educational agency may, pursuant to a policy adopted by its governing board or, in the case of a charter school, its governing body, enter into a contract with a third party for either or both of the following purposes:

(1) To provide services, including cloud-based services, for the digital storage, management, and retrieval of pupil records.

(2) To provide digital educational software that authorizes a third-party provider of digital educational software to access, store, and use pupil records in accordance with the contractual provisions listed in subdivision (b).

(b) A local educational agency that enters into a contract with a third party for purposes of subdivision (a) shall ensure the contract contains all of the following:

(1) A statement that pupil records continue to be the property of and under the control of the local educational agency.

(2) Notwithstanding paragraph (1), a description of the means by which pupils may retain possession and control of their own pupil-generated content, if applicable, including options by which a pupil may transfer pupil-generated content to a personal account.

Section 49073.1

Contract requirements for digital technology vendors storing pupil records

Section 49073.1
Contract requirements
for digital technology
vendors storing pupil records
(continued)

- (3) A prohibition against the third party using any information in the pupil record for any purpose other than those required or specifically permitted by the contract.
- (4) A description of the procedures by which a parent, legal guardian, or eligible pupil may review personally identifiable information in the pupil's records and correct erroneous information.
- (5) A description of the actions the third party will take, including the designation and training of responsible individuals, to ensure the security and confidentiality of pupil records. Compliance with this requirement shall not, in itself, absolve the third party of liability in the event of an unauthorized disclosure of pupil records.
- (6) A description of the procedures for notifying the affected parent, legal guardian, or eligible pupil in the event of an unauthorized disclosure of the pupil's records.
- (7) (A) A certification that a pupil's records shall not be retained or available to the third party upon completion of the terms of the contract and a description of how that certification will be enforced.
- (B) The requirements provided in subparagraph (A) shall not apply to pupil-generated content if the pupil chooses to establish or maintain an account with the third party for the purpose of storing that content pursuant to paragraph (2).
- (8) A description of how the local educational agency and the third party will jointly ensure compliance with the federal Family Educational Rights and Privacy Act (20 U.S.C. Sec. 1232g).
- (9) A prohibition against the third party using personally identifiable information in pupil records to engage in targeted advertising.
- (c) In addition to any other penalties, a contract that fails to comply with the requirements of this section shall be rendered void if, upon notice and a reasonable opportunity to cure, the noncompliant party fails to come into compliance and cure any defect. Written notice of noncompliance may be provided by any party to the contract. All parties subject to a contract voided under this subdivision shall return all pupil records in their possession to the local educational agency.
- (d) For purposes of this section, the following terms have the following meanings:
- (1) "Deidentified information" means information that cannot be used to identify an individual pupil.
- (2) "Eligible pupil" means a pupil who has reached 18 years of age.
- (3) "Local educational agency" includes school districts, county offices of education, and charter schools.
- (4) "Pupil-generated content" means materials created by a pupil, including, but not limited to, essays, research reports, portfolios, creative writing, music or other audio files, photographs, and account information that enables ongoing ownership of pupil content. "Pupil-generated content" does not include pupil responses to a standardized assessment where pupil possession and control would jeopardize the validity and reliability of that assessment.
- (5)(A) "Pupil records" means both of the following:
- (i) Any information directly related to a pupil that is maintained by the local educational agency.
- (ii) Any information acquired directly from the pupil through the use of instructional software or applications assigned to the pupil by a teacher or other local educational agency employee.
- (B) "Pupil records" does not mean any of the following:
- (i) Deidentified information, including aggregated deidentified information, used by the third party to improve educational products, for adaptive learning purposes, and for customizing pupil learning.
- (ii) Deidentified information, including aggregated deidentified information, used to demonstrate the effectiveness of the operator's products in the marketing of those products.
- (iii) Deidentified information, including aggregated deidentified information, used for the development and improvement of educational sites, services, or applications.
- (6) "Third party" refers to a provider of digital educational software or services, including cloud-based services, for the digital storage, management, and retrieval of pupil records.
- (e) If the provisions of this section are in conflict with the terms of a contract in effect before January 1, 2015, the provisions of this section shall not apply to the local educational agency or the third party subject to that agreement until the expiration, amendment, or renewal of the agreement.
- (f) Nothing in this section shall be construed to impose liability on a third party for content provided by any other third party.

Section 49076.7
Social security number
collection prohibited

- (a) The Legislature finds and declares both of the following:
- (1) Pupil data privacy is a priority because pupils are at risk for identity theft when providing their social security numbers.
- (2) A technical brief titled "Data Stewardship: Managing Personally Identifiable Information in Electronic Student Education Records" published by the United States Department of Education states that social security numbers are the single most misused piece of information by criminals perpetrating identity thefts.
- (b) A school district, county office of education, or charter school shall not collect or solicit social security numbers or the last four digits of social security numbers from pupils or their parents or guardians unless otherwise required to do so by state or federal law.

(c) The department may additionally prohibit the collection and solicitation of other personally identifiable information, as recommended by the Superintendent and approved by the state board.

WORKPLACE READINESS
Education Code

The week of each year that includes April 28 shall be known as “Workplace Readiness Week.” All public high schools, including charter schools, shall annually observe that week by providing information to pupils on their rights as workers. The topics covered shall include, but are not limited to, all the following:

- (1) Local, state, and federal laws regarding each of the following issues:
 - (A) Prohibitions against misclassification of employees as independent contractors.
 - (B) Child labor.
 - (C) Wage and hour protections.
 - (D) Worker safety.
 - (E) Workers’ compensation.
 - (F) Unemployment insurance.
 - (G) Paid Sick Leave, Paid Family Leave, State Disability Insurance, and the California Family Rights Act.
 - (H) The right to organize a union in the workplace.
 - (I) Prohibitions against retaliation by employers when workers exercise these or any other rights guaranteed by law.
- (2) The labor movement’s role in winning the protections and benefits described in subparagraphs (A) to (I), inclusive, of paragraph (1).
- (3) An introduction to state-approved apprenticeship programs in California, how to access them, the variety of programs available, and how they can provide an alternative career path for those who do not attend college.
 - (b) For pupils in grades 11 and 12, the observances required by this section shall be integrated into the regular school program, consistent with the history-social science framework, but may also include special events after regular school hours. This integration is encouraged, but not required, to occur during Workplace Readiness Week.
- (c) (1) Beginning August 1, 2024, any minor seeking the signature of a verifying authority on a Statement of Intent to Employ a Minor and Request for a Work Permit-Certificate of Age under this chapter shall be issued, before or at the time of receiving the signature of the verifying authority, a document clearly explaining basic labor rights extended to workers.
 - (2) Topics covered in this document shall include, but are not limited to, those identified in subparagraphs (A) to (I), inclusive, of paragraph (1) of subdivision (a).
 - (3) The University of California Berkeley Center for Labor Research and Education is encouraged to produce, with input from bona fide labor organizations, a draft template for the document to be provided to minors, including translations into other languages, including, but not limited to, Spanish, Chinese, Tagalog, Vietnamese, and Korean.
 - (4) The document shall express these labor rights in plain, natural terminology easily understood by the pupil.
 - (5) The document shall be in a physical form in English and shall include both a Uniform Resource Locator for, and a quick response code linked to, an internet website with electronic versions of the document, and any translated versions of the document, produced by the University of California Berkeley Center for Labor Research and Education pursuant to paragraph (3).
- (d) The Superintendent shall annually send a written notice, detailing requirements of Workplace Readiness Week and how teachers may access related instructional materials and other resources, to every public high school, including charter schools, at least one month before Workplace Readiness Week.

HOMICIDE THREATS
Education Code

For purposes of this article, unless the context requires otherwise, the following definitions apply:

- (a) “Law enforcement” means any of the following:
 - (1) A peace officer employed or contracted by a school, school district, or local educational agency for school safety purposes.
 - (2) A police or security department of a local educational agency.
 - (3) A local law enforcement agency or agencies with geographic jurisdiction over a local educational agency.
- (b) “Local educational agency” means a school district, county office of education, or charter school serving pupils in any of grades 6 to 12, inclusive, as part of a middle school or high school.
- (c) “Reasonable suspicion” means articulable facts, together with rational inferences from those facts, warranting an objective suspicion

Section 49390
Homicide Threats;
definitions
(continued)

(d) "School official" means any certificated or classified employee of a local educational agency or member of the school district governing board, county board of education, or governing body of a charter school whose official duties bring the individual in contact with pupils in any of grades 6 to 12, inclusive, as part of a middle school or high school, on a regular basis.

(e) "Threat or perceived threat" means any writing or action of a pupil that creates a reasonable suspicion that the pupil is preparing to commit a homicidal act related to school or a school activity. This may include possession, use, or depictions of firearms, ammunition, shootings, or targets in association with infliction of physical harm, destruction, or death in a social media post, journal, class note, or other media associated with the pupil. It may also include a warning by a parent, pupil, or other individual.

Section 49391
Model content

(a) (1) On or before July 1, 2023, the department shall develop model content, in consultation with relevant local educational agencies, civil rights groups, and the Department of Justice.

(2) The model content developed pursuant to paragraph (1) shall include, at a minimum, content that informs parents or guardians of California's child access prevention laws and laws relating to the safe storage of firearms, including, but not limited to, Division 4 (commencing with Section 25000) of Title 4 of Part 6 of the Penal Code.

(b) The department shall update the model content on a yearly basis as necessary to reflect any changes in law.

Section 49392
Annual notification

(a) Commencing with the 2023–24 school year, and each school year thereafter, a local educational agency serving pupils in kindergarten or any of grades 1 to 12, inclusive, shall, informed by the model content developed by the department pursuant to Section 49391, include in the annual notification pursuant to Section 48980, to the parents or guardians of pupils in kindergarten or any of grades 1 to 12, inclusive, information related to the safe storage of firearms.

(b) For purposes of this section, "local educational agency" means a school district, county office of education, or charter school.

Section 49393
School official reporting

(a) A school official who is alerted to or observes any threat or perceived threat, as described in subdivision (e) of Section 49390, shall immediately report the threat or perceived threat to law enforcement. The report shall include copies of any documentary or other evidence associated with the threat or perceived threat.

(b) When two or more school officials jointly have an obligation to report pursuant to subdivision (a), and when there is agreement among them, the report required by this section may be made by any of them in a single report. A school official who has knowledge that the designated reporting school official has failed to make the single report shall thereafter make the report.

(c) Law enforcement shall keep a record of any report received pursuant to this section.

Section 49394
Investigation and threat assessment

(a) Upon the notification described in Section 49393, the local law enforcement agency or the schoolsite police, as described in paragraphs (1) and (2) of subdivision (a) of Section 49390, as appropriate, with the support of the local educational agency, shall immediately conduct an investigation and assessment of any threat or perceived threat described in subdivision (e) of Section 49390.

(b) The investigation and threat assessment under subdivision (a) shall include a review of the firearm registry of the Department of Justice.

(c) The investigation and threat assessment under subdivision (a) shall include a search conducted at the schoolsite, only if the search is justified by a reasonable suspicion that it would produce evidence related to the threat or perceived threat.

Section 49395
Immunity from civil liability

A local educational agency serving pupils in kindergarten or any of grades 1 to 12, inclusive, and a school of a local educational agency, is immune from civil liability for any damages allegedly caused by, arising out of, or relating to the requirements of this article.

OPIOID OVERDOSE PREVENTION AND TREATMENT
Education Code

Section 49414.8
Availability of emergency opioid antagonist units

(a)(1) Commencing with the 2023–24 fiscal year, and for each fiscal year thereafter, the sum of three million five hundred thousand dollars (\$3,500,000) shall be appropriated from the General Fund to the department to allocate to county offices of education for the purpose of purchasing and maintaining a sufficient stock of emergency opioid antagonists for local educational agencies within its jurisdiction.

(2) (A) County offices of education shall purchase a minimum of two units for each middle school, junior high school, high school, and adult school schoolsite within their jurisdiction.

(B) Funding allocations provided to county offices of education pursuant to this section may be used to complement any emergency opioid antagonist resources allocated through the State

Department of Health Care Services' Naloxone Distribution Project for these purposes.

(3) County offices of education may enter into agreements with local educational agencies within their jurisdiction, or other county offices of education, to comply with the minimum purchasing requirements specified in paragraph (2).

(4) Funding allocations shall be reevaluated each year based on the factors listed in subdivision (c).

(b) Of the amount appropriated in subdivision (a), up to three hundred fifty thousand dollars (\$350,000) shall be allocated to county offices of education for administrative costs to coordinate, maintain stock, and distribute emergency opioid antagonists to local educational agencies within their jurisdiction. The Superintendent shall develop an allocation formula for use in determining the allocation amounts for each county office of education based on the number of local educational agencies within each county office of education's jurisdiction and the number of pupils and students served in schools within those local educational agencies.

(c) After allocations are made pursuant to subdivision (b), the department shall consider, in allocating the remaining funds to county offices of education, the number of middle school, junior high school, high school, and adult school schoolsites that are within each county office of education, the number of pupils and students served by those required schoolsites, and any other factors determined by the department.

(d) As a condition of receiving funds pursuant to this section, county offices of education shall do all of the following:

(1) Coordinate the purchase of and maintain a stock of emergency opioid antagonists on behalf of local educational agencies within their jurisdiction, in a manner consistent with paragraph (2) or (3) of subdivision (a), that is best suited for distribution and use in schools by doing all of the following:

(A) Either applying to be a qualified direct purchaser with the naloxone manufacturer to purchase the emergency opioid antagonist at the public interest price or purchasing directly from a distributor, state entity, or local entity, a quantity sufficient to stock, at a minimum, two units per middle school, junior high school, high school, and adult school schoolsite for each local educational agency within their jurisdiction, or administering the program consistent with paragraph (3) of subdivision (a).

(B) Distributing a minimum of two units of an emergency opioid antagonist to local educational agencies for each middle school, junior high school, high school, and adult school schoolsite within their jurisdiction, or administering the program consistent with paragraph (3) of subdivision (a).

(C) To the extent that the minimum stocking requirements pursuant to subparagraph (B) of paragraph (2) are met, county offices of education may also distribute emergency opioid antagonists to local educational agencies for distribution to elementary schoolsites.

(2) As a condition of receiving emergency opioid antagonist units from a county office of education, or consistent with an agreement pursuant to paragraph (3) of subdivision (a), local educational agencies shall do the following:

(A) (i) Ensure no fewer than two schoolsite staff members per required schoolsite meet the minimum standards of training for the administration of an emergency opioid antagonist as specified in subdivision (e) of Section 49414.3 or have undergone opioid overdose prevention and training and reviewed materials available on the State Department of Public Health's internet website.

(ii) County offices of education may use resources for technical assistance on the State Department of Education or State Department of Public Health's respective internet websites that include, but are not limited to, all of the following:

(I) A sample school naloxone policy

(II) A sample school naloxone policy.

(III) School and educator resources.

(IV) Education on recognizing overdoses.

(V) A naloxone administration training video.

(B) Distribute the minimum of two units of an emergency opioid antagonist to each required schoolsite, including restocking a unit before its expiration date and, if used, as soon as reasonably possible after its use, but no later than two weeks after its use.

(e) For purposes of this section, the following definitions apply:

(1) "Local educational agency" means a school district or charter school.

(2) "Opioid antagonist" means naloxone hydrochloride, or another drug approved by the federal Food and Drug Administration that, when administered, negates or neutralizes in whole or in part the pharmacological effects of an opioid in the body, and has been approved for the treatment of an opioid overdose.

(f) For purposes of making the computations required by Section 8 of Article XVI of the California Constitution, the appropriations made by subdivision (a) shall be deemed to be "General Fund revenues appropriated for school districts," as defined in subdivision (c) of Section 41202, for the fiscal year for which the appropriation is made, and included within the "total allocations to school districts and community college districts from General Fund proceeds of taxes appropriated pursuant to Article XIII B," as defined in subdivision (e) of Section 41202, for the fiscal year for which the appropriation is made.

Section 49428.16
Opioid overdose prevention

(a) It is the intent of the Legislature to assist local educational agencies in developing strategies for preventing pupil opioid overdoses, including synthetic opioids.

(b) The Legislature encourages county offices of education to establish a County Working Group on Fentanyl Education in Schools for the purposes of outreach, building awareness, and collaborating with local health agencies regarding fentanyl overdoses. A County Working Group on Fentanyl Education in Schools is encouraged to, at a minimum, include representatives of local educational agencies within the county and the county public health department.

(c) The department shall curate and maintain on its internet website all of the following:

(1) Informational materials containing awareness and safety advice, for school staff, pupils, and parents or guardians of pupils, on how to prevent an opioid overdose and any relevant information developed by a County Working Group on Fentanyl Education in Schools established pursuant to subdivision (b).

(2) Resource information on an entity's application process for the statewide standing order issued by the State Public Health Officer pursuant to Section 1714.22 of the Civil Code, and resource information on an entity's participation in the Naloxone Distribution Project administered by the State Department of Health Care Services.

(3) Resource information on the provision of emergency naloxone hydrochloride or another opioid antagonist, as described in Section 49414.3.

(d) For purposes of this section, the following definitions apply:

(1) "Local educational agency" means a county office of education, school district, state special school, or charter school that serves pupils in any of grades 7 to 12, inclusive.

(2) "Opioid antagonist" means naloxone hydrochloride or another drug approved by the federal Food and Drug Administration that, when administered, negates or neutralizes in whole or in part the pharmacological effects of an opioid in the body, and has been approved for the treatment of an opioid overdose.

Section 49426.5
Qualifications, hiring and reporting

SCHOOL NURSING

A licensed vocational nurse hired pursuant to this section shall be supervised by a credentialed school nurse who is employed as a school nurse at the same local educational agency or at another local educational agency.

(b) (1) If a local educational agency elects to hire a licensed vocational nurse to be supervised by a credentialed school nurse employed by another local educational agency, both local educational agencies shall enter into a written agreement containing all of the following:

(A) The duties of the credentialed school nurse and the licensed vocational nurse.

(B) A communication policy delineating how the licensed vocational nurse and the credentialed school nurse are to communicate.

(C) The indemnification requirement pursuant to subdivision (h).

(D) The financial arrangement between the local educational agencies.

(E) The additional compensation for the credentialed school nurse to act as a supervisor.

(2) A local educational agency is only authorized to hire a licensed vocational nurse pursuant to this subdivision if a written agreement with another local educational agency is in place.

(c) (1) A local educational agency shall only hire a licensed vocational nurse pursuant to this section if a diligent search has been conducted for a suitable credentialed school nurse each school year. A diligent search shall include, but is not limited to, distributing job announcements, contacting college and university placement centers, and advertising in print or electronic media. Copies of all recruitment efforts and the salary or salary range advertised as part of the recruitment efforts shall be retained by the employing agency.

(2) A local educational agency shall seek approval from its governing board or body before hiring a licensed vocational nurse pursuant to this section, including by submitting a declaration to its governing board or body containing all of the following:

(A) That the local educational agency made a diligent effort to recruit a credentialed school nurse with the proper qualifications for the opening.

(B) That the effort to recruit a credentialed school nurse was not successful.

(C) That hiring a licensed vocational nurse is necessary to fulfill a critical need.

(3) A local educational agency electing to hire a licensed vocational nurse pursuant to this section shall certify to the department, upon penalty of perjury, that a diligent recruitment effort to hire a credentialed school nurse was made.

(d) Subdivision (a) shall not be interpreted to allow a licensed vocational nurse to go beyond the approved scope of practice pursuant to the Vocational Nursing Practice Act (Chapter 6.5 (commencing with Section 2840) of Division 2 of the Business and Professions Code).

(e) A licensed vocational nurse hired pursuant to this section shall only operate under the supervision of a credentialed school nurse based on levels of supervision described in Section 3051.12 of Title 5 of the California Code of Regulations.

(f) County offices of education are encouraged to establish networks of credentialed school nurses for employment by local educational agencies that are not able to hire a credentialed school nurse. County offices of education are encouraged to provide mentoring opportunities for licensed vocational nurses.

(g) A local educational agency employing a credentialed school nurse who is supervising a licensed vocational nurse at another local educational agency pursuant to this section shall have indemnification for the supervisory liability from the local educational agency employing the licensed vocational nurse.

(h) A credentialed school nurse who is supervising a licensed vocational nurse at another local educational agency pursuant to this section shall have indemnification for the supervisory liability from the local educational agency employing the licensed vocational nurse.

(i) If a local educational agency uses its authority pursuant to this section, the local educational agency shall report its use of that authority to the department.

(j) (1) On or before January 1, 2028, the department shall submit a report to the Legislature containing a list of the local educational agencies that have used their authority pursuant to this section.

(2) The report submitted pursuant to paragraph (1) shall be submitted in compliance with Section 9795 of the Government Code.

(k) As used in this section, the following terms have the following meanings:

(1) "Credentialed school nurse" means only qualified persons who possess an appropriate credential issued pursuant to Section 44267.5.

(2) "Licensed vocational nurse" means a person licensed pursuant to the provisions of Chapter 6.5 (commencing with Section 2840) of Division 2 of the Business and Professions Code.

(3) "Local educational agency" means a school district, county office of education, or charter school.

NOTICE OF MENTAL HEALTH SERVICES **Education Code**

(a) A school of a school district or county office of education and a charter school shall notify pupils and parents or guardians of pupils no less than twice during the school year on how to initiate access to available pupil mental health services on campus or in the community, or both, as follows:

(1) A school shall use at least two of the following methods to notify parents or guardians:

(A) Distributing the information in a letter electronically or in hardcopy, including, but not limited to, through the postal service.

(B) Including the information in the parent handbook at the beginning of the school year in accordance with Section 48980.

(C) Posting the information on the school's Internet Web site or social media Internet Web page.

(2) A school shall use at least two of the following methods to notify pupils:

(A) Distributing the information in a document or school publication electronically or in hardcopy.

(B) Including the information in pupil orientation materials at the beginning of the school year or in a pupil handbook.

(C) Posting the information on the school's Internet Web site or social media Internet Web page.

(b) (1) A county may use funds from the Mental Health Services Act, enacted by the voters at the November 2, 2004, statewide general election as Proposition 63, to provide a grant to a school district or county office of education, or to a charter school, within the county, for purposes of funding the activities required pursuant to subdivision (a).

(2) A school district or county office of education, or a charter school, may apply to its respective county for a grant pursuant to paragraph (1).

(a) On or before the start of the 2023–24 school year, each schoolsite in a school district, county office of education, or charter school, serving pupils in any of grades 6 to 12, inclusive, shall create a poster that identifies approaches and shares resources regarding pupil mental health.

(b) The schoolsite may partner with pupils enrolled at that schoolsite, local, state, or federal agencies, or nonprofit organizations, for purposes of the design and content of the poster.

(c) The language in the poster shall be age appropriate and culturally relevant, and the schoolsite may partner with pupils enrolled at that schoolsite, local, state, or federal agencies, or nonprofit organizations, for these purposes.

(d) The poster shall be displayed in English and any primary language spoken by 15 percent or more of the pupils enrolled at the schoolsite as determined pursuant to Section 48985.

(e) The poster shall be no smaller than 8.5 by 11 inches and use at least 12-point font.

(f) The poster shall display, at a minimum, all of the following:

(1) Identification of common behaviors of those struggling with mental health or who are in a mental health crisis, including, but not limited to, anxiety, depression, eating disorders, emotional dysregulation, bipolar episodes, and schizophrenic episodes.

(2) A list of, and contact information for, schoolsite-specific resources, including, but not limited to, counselors, wellness centers, and peer counselors.

(3) A list of, and contact information for, community resources, including, but not limited to, suicide prevention, substance abuse, child crisis, nonpolice mental health hotlines, public behavioral health services, and community mental health centers.

Section 49428 **Notice to families of access to mental health services**

Section 49428.5 **Mental health assistance posters**

Section 49428.5
Mental health assistance
posters
(continued)

- (4) A list of positive coping strategies to use when dealing with mental health, including, but not limited to, meditation, mindfulness, yoga, breathing exercises, grounding skills, journaling, acceptance, and seeking therapy.
- (5) A list of negative coping strategies to avoid, including, but not limited to, substance abuse or self-medication, violence and abuse, self-harm, compulsivity, dissociation, catastrophizing, and isolating.
- (g) (1) (A) Commencing with the 2023–24 school year, the poster shall be prominently and conspicuously displayed in appropriate public areas that are accessible to, and commonly frequented by, pupils at each schoolsite.
- (B) The governing board of a school district, governing body of a charter school, and county board of education shall have full discretion to select additional appropriate public areas that are accessible to, and commonly frequented by, pupils to display the poster at the schoolsite. These areas may include, but are not limited to, bathrooms, locker rooms, classrooms, classroom hallways, gymnasiums, auditoriums, cafeterias, wellness centers, and offices.
- (2) The poster shall be digitized and distributed online to pupils through social media, internet websites, portals, and learning platforms at the beginning of each school year.
- (3) To assist school districts, county offices of education, and charter schools in developing policies for pupil suicide prevention, the department shall develop and maintain a model poster, in collaboration with mental health experts, pupils, and administrators, in accordance with this section to serve as a guide for school districts, county offices of education, and charter schools.
- (h) No basis for civil liability is created by this section for any school district, county office of education, or charter school serving pupils in any of grades 6 to 12, inclusive.

SCHOOL MEALS
Education Code

Section 49501.5
Universal Free Meals

Notwithstanding any other provision of this chapter, commencing with the 2022–23 school year all of the following shall apply:

- (1) (A) A school district, county superintendent of schools, or charter school maintaining kindergarten or any of grades 1 to 12, inclusive, shall make available a nutritionally adequate breakfast and a nutritionally adequate lunch free of charge and with adequate time to eat, as determined by that school district, county superintendent of schools, or charter school in consideration of the recommendations provided by the department pursuant to subdivision (e), during each schoolday to any pupil who requests a meal without consideration of the pupil's eligibility for a federally funded free or reduced-price meal, except as described in clauses (i) and (ii) of subparagraph (B), with a maximum of one free breakfast meal and one free lunch meal, except for family daycare homes that shall be reimbursed for 75 percent of the meals served. The meals made available under this paragraph shall be nutritionally adequate meals that qualify for federal reimbursement. Participating school districts, county superintendents of schools, and charter schools shall comply with federal regulations for the National School Lunch Program and School Breakfast Program, which includes established mealtimes.
- (B) (i) The department shall submit a waiver request to the United States Department of Agriculture to allow for one meal provided during a schoolday lasting four hours or less to be served in a noncongregate manner.
- (ii) If the department receives approval for the federal noncongregate waiver required by clause (i), school districts, county superintendents of schools, and charter schools may make available either a nutritionally adequate breakfast or a nutritionally adequate lunch in a noncongregate manner for meal service combinations resulting in either (I) a congregate nutritionally adequate breakfast and a noncongregate nutritionally adequate lunch or (II) a noncongregate nutritionally adequate breakfast and a congregate nutritionally adequate lunch. These meals shall be reimbursed under the provisions of paragraph (2) if both state and federal requirements are met.
- (2) The department shall provide state meal reimbursement to school districts, county offices of education, and charter schools that participate in, and meet the requirements of, the federal School Breakfast Program and National School Lunch Program, and any applicable state laws and regulations. State meal reimbursement shall be provided for reduced-price and paid meals served to pupils, as described in subdivision (b).
- (b) The amount of per-meal reimbursements provided under this section shall not exceed the difference between the sum of the amounts calculated from meals claimed based on the free combined breakfast and lunch reimbursement rates established by the United States Department of Agriculture and state meal contribution established in Section 49559, and the combined federal and state amounts reimbursed for reduced-price and paid meals claimed.
- (c) The reimbursement required pursuant to this section shall be provided upon appropriation by the Legislature. This section shall not be operative until the Legislature has appropriated funds for purposes of this section.
- (d) (1) The department may adopt, and as necessary revise, guidelines in accordance with this section at a publicly noticed meeting if the department complies with all of the following:
- (A) Provides an opportunity for public comment at the meeting.

(B) Provides written public notice of a meeting at least 30 days before the meeting at which the guideline to be adopted will be considered or approved.

(C) For a substantive revision of the guidelines, the department provides written notice of a meeting at least 15 days before the meeting at which the revision will be considered or approved.

(2) The adoption or revision of guidelines pursuant to this subdivision is exempt from Chapter 3.5 (commencing with Section 11340) of Part 1 of Division 3 of Title 2 of the Government Code until July 1, 2023.

(e) The department shall review available evidence-based research, studies, and survey findings with school food authorities and school food workers, or their representatives, to make a recommendation for the amount of time that is adequate for a pupil to eat a school meal, including, but not limited to, the steps necessary to ensure that a pupil has adequate time to eat school meals that are served pursuant to this section and examining the role that breakfast in the classroom and other innovative breakfast models can play in supporting adequate time to eat. These recommendations shall be made public on the department's internet website on or before June 30, 2025.

(f) Notwithstanding subdivision (a), a school district, county office of education, or charter school that offers independent study, pursuant to Article 5.5 (commencing with Section 51744) of Chapter 5 of Part 28, shall meet the requirements of this section for any pupil on any schoolday that the pupil is scheduled for educational activities, as defined in Section 49010, lasting two or more hours, at a schoolsite, resource center, meeting space, or other satellite facility. Pupils who are present during established meal times shall have a nutritionally adequate breakfast and nutritionally adequate lunch made available.

(g) The chartering authority shall, upon request by a charter school and to the extent feasible within existing resources, provide technical assistance to the charter school in implementing this section.

(h) A charter school may enter into a partnership with an existing school food authority for the purposes of implementing this section.

(i) The chartering authority shall, upon request by a new charter school, contract with a charter school to make available a nutritionally adequate school breakfast and a nutritionally adequate school lunch until the charter school is an approved school food authority or until July 1 of the school year after the charter school becomes operational, whichever occurs first. The contract shall not exceed the actual costs to provide meals to the charter school, including, but not limited to, additional staffing costs and delivery of meals to the schoolsite, that are not covered by federal or state meal reimbursement.

(j) To comply with subdivision (a), a school district, county office of education, or charter school may use funds made available through any federal or state program the purpose of which includes the provision of meals to a pupil, including the federal School Breakfast Program, the federal National School Lunch Program, the federal Summer Food Service Program, the federal Seamless Summer Option, or the state meal program, or may do so at the expense of the school district, county office of education, or charter school.

(k) For purposes of this section, the following definitions apply:

(1) "Nutritionally adequate breakfast" is one that qualifies for reimbursement under the most current meal pattern for the federal School Breakfast Program, as defined in Section 220.8 of Title 7 of the Code of Federal Regulations.

(2) "Nutritionally adequate lunch" is one that qualifies for reimbursement under the most current meal pattern for the federal National School Lunch Program, as defined in Section 210.10 of Title 7 of the Code of Federal Regulations.

(3) "Schoolday" means any day that pupils in kindergarten or any of grades 1 to 12, inclusive, are present at a schoolsite or school facility for purposes of instruction or educational activities, as defined in Section 49010, including, but not limited to, pupil attendance at minimum days, state-funded preschool, transitional kindergarten, summer school including incoming kindergarten pupils, extended school year days, school-sponsored field trips, independent study when a pupil is onsite during the schoolday, and Saturday school sessions.

TYPE 1 DIABETES **Education Code**

(a) The department, in coordination with any other entity the department deems appropriate, shall develop type 1 diabetes informational materials for the parents and guardians of pupils. The informational materials shall be made available to each school district, county office of education, and charter school through the department's internet website.

(b) On and after January 1, 2023, the governing board of a school district, county board of education, and governing body of a charter school shall make the type 1 diabetes informational materials accessible to the parent or guardian of a pupil when the pupil is first enrolled in elementary school, or with the information provided pursuant to Section 48980.

Section 49452.6 **Information provided to families**

Section 49452.6
Information provided to families
(continued)

- (c) Information provided to parents and guardians pursuant to this section may include, but shall not be limited to, all of the following:
- (1) A description of type 1 diabetes.
 - (2) A description of the risk factors and warning signs associated with type 1 diabetes.
 - (3) A recommendation regarding those pupils displaying warning signs associated with type 1 diabetes that the parents or guardians of those pupils should immediately consult with the pupil's primary care provider to determine if immediate screening for type 1 diabetes is appropriate.
 - (4) A description of the screening process for type 1 diabetes and the implications of test results.
 - (5) A recommendation that, following a type 1 diagnosis, parents or guardians should consult with the pupil's primary care provider to develop an appropriate treatment plan, which may include consultation with and examination by a specialty care provider, including, but not limited to, a properly qualified endocrinologist.

ATHLETE HEAD INJURIES

Education Code

Section 49475
Head injuries; information sheet

- (a) If a school district, charter school, or private school elects to offer an athletic program, the school district, charter school, or private school shall comply with both of the following:
- (1) An athlete who is suspected of sustaining a concussion or head injury in an athletic activity shall be immediately removed from the athletic activity for the remainder of the day, and shall not be permitted to return to the athletic activity until he or she is evaluated by a licensed health care provider. The athlete shall not be permitted to return to the athletic activity until he or she receives written clearance to return to the athletic activity from a licensed health care provider. If the licensed health care provider determines that the athlete sustained a concussion or a head injury, the athlete shall also complete a graduated return-to-play protocol of no less than seven days in duration under the supervision of a licensed health care provider. The California Interscholastic Federation is urged to work in consultation with the American Academy of Pediatrics and the American Medical Society for Sports Medicine to develop and adopt rules and protocols to implement this paragraph.
 - (2) On a yearly basis, a concussion and head injury information sheet shall be signed and returned by the athlete and the athlete's parent or guardian before the athlete initiates practice or competition.
- (b) As used in this section, "licensed health care provider" means a licensed health care provider who is trained in the management of concussions and is acting within the scope of his or her practice.
- (c) This section does not apply to an athlete engaging in an athletic activity during the regular school day or as part of a physical education course required pursuant to subdivision (d) of Section 51220.

MATHEMATICS PLACEMENT POLICY

Education Code

Section 51224.7
Mathematics placement policy;
internet posting required

- (a) This act shall be known, and may be cited, as the California Mathematics Placement Act of 2015.
- (b) Governing boards or bodies of local educational agencies that serve pupils entering grade 9 and that have not adopted a fair, objective, and transparent mathematics placement policy, as described in paragraphs (1) to (5), inclusive, as of January 1, 2016, shall, before the beginning of the 2016-17 school year, develop and adopt, in a regularly scheduled public meeting, a fair, objective, and transparent mathematics placement policy for pupils entering grade 9 that does all of the following:
- (1) Systematically takes multiple objective academic measures of pupil performance into consideration. For purposes of this paragraph, "objective academic measures" means measures, such as statewide mathematics assessments, including interim and summative assessments authorized pursuant to Section 60640, placement tests that are aligned to state-adopted content standards in mathematics, classroom assignment and grades, and report cards.
 - (2) Includes at least one placement checkpoint within the first month of the school year to ensure accurate placement and permit reevaluation of individual pupil progress.
 - (3) Requires examination of aggregate pupil placement data annually to ensure that pupils who are qualified to progress in mathematics courses based on their performance on objective academic measures selected for inclusion in the policy pursuant to paragraph (1) are not held back in a disproportionate manner on the basis of their race, ethnicity, gender, or socioeconomic background. The local educational agency shall report the aggregate results of this examination to the governing board or body of the local educational agency.
 - (4) Offers clear and timely recourse for each pupil and his or her parent or legal guardian who questions the pupil's placement.
 - (5) For nonunified school districts, addresses the consistency of mathematics placement policies between elementary and high school districts.
- (c) Governing boards or bodies of local educational agencies serving pupils who are transitioning

**Section 51224.7
Mathematics placement policy;
internet posting required
(continued)**

between elementary and middle school or elementary and junior high school may develop and implement a mathematics placement policy for these pupils, as applicable, that satisfies paragraphs (1) to (5), inclusive, of subdivision (b).

(d) Each governing board or body of a local educational agency shall ensure that its mathematics placement policy is posted on its Internet Web site.

(e) For purposes of this section, "local educational agency" means county office of education, school district, state special school, or charter school.

Post policy on school website

**HIGH SCHOOL GRADUATION REQUIREMENTS
Education Code**

For purposes of this section, the following definitions apply:

(1) "Governing body" means the governing board of a school district, the governing body of a charter school, or a county board of education, as applicable.

(2) "Local educational agency" means a school district, charter school, or county office of education.

(b) Notwithstanding any other law, a local educational agency shall do both of the following:

(1) Exempt a pupil who was enrolled in the pupil's third or fourth year of high school during the 2020–21 school year and who is not on track to graduate in four years from all coursework and other requirements adopted by the governing body that are in addition to the statewide coursework requirements specified in Section 51225.3.

(2) Provide a pupil who was enrolled in the pupil's third or fourth year of high school during the 2020–21 school year, and who is not on track to graduate in the 2020–21 or 2021–22 school years, the opportunity to complete the statewide coursework required for graduation pursuant to Section 51225.3, which opportunity may include, but is not limited to, completion of the coursework through a fifth year of instruction, credit recovery, or other opportunity to complete the required coursework.

**Section 51125
Coursework exemptions
and opportunities**

Notwithstanding any other law, a local educational agency, as defined in subdivision (t), shall exempt a pupil in foster care, as defined in subdivision (t), a pupil who is a homeless child or youth, as defined in Section 11434a(2) of Title 42 of the United States Code, a former juvenile court school pupil, as defined in Section 51225.2, a pupil who is a child of a military family, as defined in Section 49701, or a pupil who is a migratory child, as defined in subdivision (a) of Section 54441, who transfers between schools any time after the completion of the pupil's second year of high school, or a pupil participating in a newcomer program, as defined in Section 51225.2, and who is in their third or fourth year of high school, from all coursework and other requirements adopted by the governing body that are in addition to the statewide coursework requirements specified in Section 51225.3, unless the local educational agency makes a finding that the pupil is reasonably able to complete the local educational agency's graduation requirements in time to graduate from high school by the end of the pupil's fourth year of high school.

**Section 51225.1
Consultation and determinations
for pupils in specific situations**

(b) If the local educational agency determines that the pupil in foster care, the pupil who is a homeless child or youth, the former juvenile court school pupil, the pupil who is a child of a military family, the pupil who is a migratory child, or the pupil participating in a newcomer program is reasonably able to complete the local educational agency's graduation requirements within the pupil's fifth year of high school, the local educational agency shall do all of the following:

(1) Consult with the pupil and the person holding the right to make educational decisions for the pupil regarding the pupil's option to remain in school for a fifth year to complete the local educational agency's graduation requirements.

(2) Consult with the pupil, and the person holding the right to make educational decisions for the pupil, about how remaining in school for a fifth year to complete the local educational agency's graduation requirements will affect the pupil's ability to gain admission to a postsecondary educational institution.

(3) Consult with and provide information to the pupil about transfer opportunities available through the California Community Colleges.

(4) Permit the pupil to stay in school for a fifth year to complete the local educational agency's graduation requirements upon agreement with the pupil, if the pupil is 18 years of age or older, or, if the pupil is under 18 years of age, upon agreement with the person holding the right to make educational decisions for the pupil.

(5) For a pupil in foster care or a pupil who is a homeless child or youth, consult with the pupil, and the person holding the right to make educational decisions for the pupil, regarding the pupil's option to remain in the pupil's school of origin, pursuant to Section 48852.7 for a pupil who is a homeless child or youth, or Section 48853.5 for a pupil in foster care.

(c) To determine whether a pupil in foster care, a pupil who is a homeless child or youth, a former juvenile court school pupil, a pupil who is a child of a military family, or a pupil who is a migratory child is in the third or fourth year of high school, the number of credits the pupil has earned to the date of transfer, the length of the pupil's school enrollment, or, for pupils with significant gaps in school attendance, the pupil's age as compared to the average age of pupils in the third or fourth

Section 51225.1

Consultation and determinations for pupils in specific situations

(continued)

year of high school, may be used, whichever will qualify the pupil for the exemption. In the case of a pupil participating in a newcomer program, enrollment in grade 11 or 12, based on the average age of pupils in the third or fourth year of high school, may be used to determine whether the pupil is in the pupil's third or fourth year of high school.

(d) (1) (A) Within 30 calendar days of the date that a pupil in foster care who may qualify for the exemption from local graduation requirements pursuant to this section transfers into a school, the local educational agency shall notify the pupil, the person holding the right to make educational decisions for the pupil, and the pupil's social worker or probation officer of the availability of the exemption and whether the pupil qualifies for an exemption.

(B) If the local educational agency fails to provide timely notice pursuant to subparagraph (A), the pupil described in subparagraph (A) shall be eligible for the exemption from local graduation requirements pursuant to this section once notified, even if that notification occurs after the termination of the court's jurisdiction over the pupil, if the pupil otherwise qualifies for the exemption pursuant to this section.

(2) (A) Within 30 calendar days of the date that a pupil who is a homeless child or youth who may qualify for the exemption from local graduation requirements pursuant to this section transfers into a school, the local educational agency shall notify the pupil, the person holding the right to make educational decisions for the pupil, and the local educational agency liaison for homeless children and youth designated pursuant to Section 11432(g)(1)(J)(ii) of Title 42 of the United States Code, of the availability of the exemption and whether the pupil qualifies for an exemption.

(B) If the local educational agency fails to provide timely notice pursuant to subparagraph (A), the pupil described in subparagraph (A) shall be eligible for the exemption from local graduation requirements pursuant to this section once notified, even if that notification occurs after the pupil is no longer a homeless child or youth, if the pupil otherwise qualifies for the exemption pursuant to this section.

(3) (A) Within 30 calendar days of the date that a former juvenile court school pupil who may qualify for the exemption from local graduation requirements pursuant to this section transfers into a school, the local educational agency shall notify the pupil, the person holding the right to make educational decisions for the pupil, and the pupil's social worker or probation officer of the availability of the exemption and whether the pupil qualifies for an exemption.

(B) If the local educational agency fails to provide timely notice pursuant to subparagraph (A), the pupil described in subparagraph (A) shall be eligible for the exemption from local graduation requirements pursuant to this section once notified, even if that notification occurs after termination of the court's jurisdiction over the pupil, if the pupil otherwise qualifies for the exemption pursuant to this section.

(4) (A) Within 30 calendar days of the date that a pupil who is a child of a military family who may qualify for the exemption from local graduation requirements pursuant to this section transfers into a school, the local educational agency shall notify the pupil and the pupil's parent or guardian of the availability of the exemption and whether the pupil qualifies for an exemption.

(B) If the local educational agency fails to provide timely notice pursuant to subparagraph (A), the pupil described in subparagraph (A) shall be eligible for the exemption from local graduation requirements pursuant to this section once notified, even if that notification occurs after the pupil no longer meets the definition of "children of military families" under Section 49701, if the pupil otherwise qualifies for the exemption pursuant to this section.

(5) (A) Within 30 calendar days of the date that a pupil who is a migratory child who may qualify for the exemption from local graduation requirements pursuant to this section transfers into a school, the local educational agency shall notify the pupil and the pupil's parent or guardian of the availability of the exemption and whether the pupil qualifies for an exemption.

(B) If the local educational agency fails to provide timely notice pursuant to subparagraph (A), the pupil described in subparagraph (A) shall be eligible for the exemption from local graduation requirements pursuant to this section once notified, even if that notification occurs after the pupil no longer meets the definition of "migratory child" if the pupil otherwise qualifies for the exemption pursuant to this section.

(6) (A) Within 30 calendar days of the date that a pupil participating in a newcomer program who may qualify for the exemption from local graduation requirements pursuant to this section commences participation in a newcomer program at a school, the local educational agency shall notify the pupil and the pupil's parent or guardian of the availability of the exemption and whether the pupil qualifies for an exemption.

(B) If the local educational agency fails to provide timely notice pursuant to subparagraph (A), the pupil described in subparagraph (A) shall be eligible for the exemption from local graduation requirements pursuant to this section once notified, even if that notification occurs after the pupil no longer meets the definition of a "pupil participating in a newcomer program" if the pupil otherwise qualifies for the exemption pursuant to this section.

(e) If a pupil in foster care, a pupil who is a homeless child or youth, a former juvenile court school pupil, a pupil who is a child of a military family, a pupil who is a migratory child, or a pupil participating in a newcomer program is exempted from local graduation requirements pursuant

to this section and completes the statewide coursework requirements specified in Section 51225.3 before the end of the pupil's fourth year of high school and that pupil would otherwise be entitled to remain in attendance at the school, a school, including a charter school, or school district shall not require or request that the pupil graduate before the end of the pupil's fourth year of high school.

(f) If a pupil in foster care, a pupil who is a homeless child or youth, a former juvenile court school pupil, a pupil who is a child of a military family, a pupil who is a migratory child, or a pupil participating in a newcomer program is exempted from local graduation requirements pursuant to this section, in addition to providing notification of the exemption pursuant to subdivision (d), the local educational agency shall consult with the pupil and the person holding the right to make educational decisions for the pupil. The consultation shall include all of the following:

(1) Discussion regarding how any of the requirements that are waived may affect the pupil's postsecondary education or vocation plans, including the ability to gain admission to a postsecondary educational institution.

(2) Discussion and information about other options available to the pupil, including, but not limited to, a fifth year of high school, possible credit recovery, and any transfer opportunities available through the California Community Colleges.

(3) Consideration of the pupil's academic data and any other information relevant to making an informed decision on whether to accept the exemption.

(g) A pupil in foster care, a pupil who is a homeless child or youth, a former juvenile court school pupil, a pupil who is a child of a military family, a pupil who is a migratory child, or a pupil participating in a newcomer program who is eligible for the exemption from local graduation requirements pursuant to this section and would otherwise be entitled to remain in attendance at the school shall not be required to accept the exemption or be denied enrollment in, or the ability to complete, courses for which the pupil is otherwise eligible, including courses necessary to attend an institution of higher education, regardless of whether those courses are required for statewide graduation requirements.

(h) (1) If a pupil in foster care, a pupil who is a homeless child or youth, a former juvenile court school pupil, a pupil who is a child of a military family, a pupil who is a migratory child, or a pupil participating in a newcomer program is not exempted from local graduation requirements or has previously declined the exemption pursuant to this section, a local educational agency shall exempt the pupil within 30 days of the date of the exemption request, if an exemption is requested by the pupil or the person holding the right to make educational decisions for the pupil and the pupil qualifies for the exemption.

(2) If a pupil in foster care, a pupil who is a homeless child or youth, a former juvenile court school pupil, a pupil who is a child of a military family, a pupil who is a migratory child, or a pupil participating in a newcomer program who was eligible for an exemption pursuant to this section, was not properly notified of the availability of the exemption pursuant to subdivision (d), or declined the exemption, a local educational agency nonetheless shall exempt the pupil within 30 days of the date of the exemption request, if an exemption is requested by the pupil or the person holding the right to make educational decisions for the pupil, and the pupil at one time qualified for the exemption, even if the pupil is no longer homeless, a child of a military family, a pupil who is a migratory child, a pupil participating in a newcomer program, or the court's jurisdiction over the pupil has terminated.

(i) If a pupil in foster care, a pupil who is a homeless child or youth, a former juvenile court school pupil, a pupil who is a child of a military family, a pupil who is a migratory child, or a pupil participating in a newcomer program is exempted from local graduation requirements pursuant to this section, a local educational agency shall not revoke the exemption.

(j) (1) If a pupil in foster care is exempted from local graduation requirements pursuant to this section, the exemption shall continue to apply after the termination of the court's jurisdiction over the pupil while the pupil is enrolled in school or if the pupil transfers to another school, including a charter school, or school district.

(2) If a pupil who is a homeless child or youth is exempted from local graduation requirements pursuant to this section, the exemption shall continue to apply after the pupil is no longer a homeless child or youth while the pupil is enrolled in school or if the pupil transfers to another school, including a charter school, or school district.

(3) If a former juvenile court school pupil is exempted from local graduation requirements pursuant to this section, the exemption shall continue to apply after the termination of the court's jurisdiction over the pupil while the pupil is enrolled in school or if the pupil transfers to another school, including a charter school, or school district.

(4) If a pupil who is a child of a military family is exempted from local graduation requirements pursuant to this section, the exemption shall continue to apply after the pupil no longer meets the definition of "children of military families" under Section 49701 while the pupil is enrolled in school or if the pupil transfers to another school, including a charter school, or school district.

(5) If a pupil who is a migratory child is exempted from local graduation requirements pursuant to this section, the exemption shall continue to apply after the pupil no longer meets the definition

Section 51225.1
Consultation and determinations for
pupils in specific situations
(continued)

of “migratory child” while the pupil is enrolled in school or if the pupil transfers to another school, including a charter school, or school district.

(6) If a pupil participating in a newcomer program is exempted from local graduation requirements pursuant to this section, the exemption shall continue to apply after the pupil no longer meets the definition of a “pupil participating in a newcomer program” while the pupil is enrolled in school or if the pupil transfers to another school, including a charter school, or school district.

(k) A local educational agency shall not require or request a pupil in foster care, a pupil who is a homeless child or youth, a former juvenile court school pupil, a pupil who is a child of a military family, or a pupil who is a migratory child to transfer schools in order to qualify the pupil for an exemption pursuant to this section.

(l) (1) A pupil in foster care, the person holding the right to make educational decisions for the pupil, the pupil’s social worker, or the pupil’s probation officer shall not request a transfer solely to qualify the pupil for an exemption pursuant to this section.

(2) A pupil who is a homeless child or youth, the person holding the right to make educational decisions for the pupil, or the local educational agency liaison for homeless children and youth designated pursuant to Section 11432(g)(1)(J)(ii) of Title 42 of the United States Code, shall not request a transfer solely to qualify the pupil for an exemption pursuant to this section.

(3) A former juvenile court school pupil, the person holding the right to make educational decisions for the pupil, the pupil’s social worker, or the pupil’s probation officer shall not request a transfer solely to qualify the pupil for an exemption pursuant to this section.

(4) A pupil who is a child of a military family, or the pupil’s parent or guardian, shall not request a transfer solely to qualify the pupil for an exemption pursuant to this section.

(5) A pupil who is a migratory child, or the pupil’s parent or guardian, shall not request a transfer solely to qualify the pupil for an exemption pursuant to this section.

(m) (1) A complaint of noncompliance with the requirements of this section may be filed with the local educational agency under the Uniform Complaint Procedures set forth in Chapter 5.1 (commencing with Section 4600) of Division 1 of Title 5 of the California Code of Regulations.

(2) A complainant not satisfied with the decision of a local educational agency may appeal the decision to the department pursuant to Chapter 5.1 (commencing with Section 4600) of Division 1 of Title 5 of the California Code of Regulations and shall receive a written decision regarding the appeal within 60 days of the department’s receipt of the appeal.

(3) If a local educational agency finds merit in a complaint, or the Superintendent finds merit in an appeal, the local educational agency shall provide a remedy to the affected pupil.

(4) Information regarding the requirements of this section shall be included in the annual notification distributed to, among others, pupils, parents or guardians of pupils, employees, and other interested parties pursuant to Section 4622 of Title 5 of the California Code of Regulations.

(n) (1) If a local educational agency determines that a pupil in foster care, a pupil who is a homeless child or youth, a former juvenile court school pupil, a pupil who is a child of a military family, or a pupil who is a migratory child and who transfers between schools any time after the completion of the pupil’s second year of high school, or a pupil participating in a newcomer program who is in their third or fourth year of high school, is not reasonably able to complete the local educational agency’s graduation requirements within the pupil’s fifth year of high school, but is reasonably able to complete the statewide coursework requirements specified in Section 51225.3 within the pupil’s fifth year of high school, the local educational agency shall exempt a pupil from the local educational agency’s graduation requirements and provide the pupil the option to remain in school for a fifth year to complete the statewide coursework requirements. The local educational agency shall consult with the pupil and the person holding the right to make educational decisions for the pupil regarding all of the following:

(A) The pupil’s option to remain in school for a fifth year to complete the statewide coursework requirements.

(B) How waiving the local educational requirements and remaining in school for a fifth year may affect the pupil’s postsecondary education or vocation plans, including the ability to gain admission to a institution of higher education.

(C) Whether any other options are available to the pupil, including, but not limited to, possible credit recovery, and any transfer opportunities available through the California Community Colleges.

(D) The pupil’s academic data and any other information relevant to making an informed decision on whether to accept the exemption and option to remain in school for a fifth year to complete the statewide coursework requirements.

(2) This subdivision shall become inoperative on January 1, 2028.

(o) (1) If a pupil in foster care, a pupil who is a homeless child or youth, a former juvenile court school pupil, a pupil who is a child of a military family, a pupil who is a migratory child is not eligible for an exemption pursuant to this section in the year in which the pupil transfers between schools, or for a pupil participating in a newcomer program, is not eligible for an exemption pursuant to this section in the pupil’s third year of high school, because the local educational agency makes a finding that the pupil is reasonably able to complete the local educational agency’s graduation

Section 51225.1
Consultation and determinations for
pupils in specific situations
(continued)

requirements in time to graduate from high school by the end of the pupil's fourth year of high school, a local educational agency nonetheless shall reevaluate eligibility and provide written notice to the pupil, the person holding the right to make educational decisions for the pupil, and the pupil's social worker or probation officer, if applicable, whether the pupil qualifies for an exemption within the first 30 calendar days of the following academic year, based on the course completion status of the pupil at the time of reevaluation to determine if the pupil continues to be reasonably able to complete the local educational agency's graduation requirements in time to graduate from high school by the end of the pupil's fourth year of high school.

(2) If it is determined within the first 30 calendar days of the following academic year, that given their course completion status at that time the reevaluation conducted pursuant to paragraph (1) that the pupil is not reasonably able to complete the local educational agency's graduation requirements in time to graduate from high school by the end of the pupil's fourth year of high school, the local educational agency shall provide the pupil with the option to receive an exemption from all coursework and other requirements adopted by the governing body of the local educational agency that are in addition to the statewide coursework requirements specified in Section 51225.3 or to stay in school for a fifth year to complete the local educational agency's graduation requirements upon agreement with the pupil, if the pupil is 18 years of age or older, or, if the pupil is under 18 years of age, upon agreement with the person holding the right to make educational decisions for the pupil and provide notification of the availability of these options pursuant to subdivisions (b) and (d).

(p) (1) This section shall apply to a pupil in foster care, a pupil who is a homeless child or youth, a former juvenile court school pupil, a pupil who is a child of a military family, a pupil who is a migratory child, or a pupil participating in a newcomer program, who is enrolled in an adult education program, regardless of the pupil's age.

(2) This section shall apply to a pupil who is enrolled in an adult education program who, while enrolled in high school, was a pupil in foster care, a pupil who is a homeless child or youth, a former juvenile court school pupil, a pupil who is a child of a military family, a pupil who is a migratory child, or a pupil participating in a newcomer program.

(q) For a pupil who is an unaccompanied youth as defined in Section 11434a(6) of Title 42 of the United States Code, the "person holding the right to make educational decisions for the pupil" is the unaccompanied youth.

(r) If a local educational agency or adult school offers to exempt a pupil in foster care, a pupil who is a homeless child or youth, a former juvenile court school pupil, a pupil who is a child of a military family, a pupil who is a migratory child, or a pupil participating in a newcomer program from all coursework and other requirements adopted by the governing body of the local educational agency that are in addition to the statewide coursework requirements specified in Section 51225.3, it is in the sole discretion of the person holding the right to make educational decisions for the pupil, or the pupil themselves if they are 18 years of age or older, an unaccompanied youth as defined in Section 11434a(6) of Title 42 of the United States Code, or an unaccompanied minor who holds their own education rights, whether to accept the exemption, based on the pupil's best educational interests.

(s) Each local educational agency shall report to the department annually on the number of pupils who, for the prior school year, graduated with an exemption from the local educational agency's graduation requirements that are in addition to the statewide coursework requirements. This data shall be reported for pupils graduating in the fourth year and fifth year cohorts, and shall be disaggregated by cohort, pupil category, race, and disability status. The department shall make this data publicly available on an annual basis aligned with other reporting timelines for the California dashboard graduation data. For purposes of this subdivision, "pupil category" means the categories of pupils identified in subdivision (a).

(t) For purposes of this section, the following terms have the following meanings:

(1) "Governing body" means the governing board of a school district or the governing body of a charter school, as applicable.

(2) "Local educational agency" means a school district or charter school.

(3) "Pupil in foster care" has the same meaning as foster child, defined in subdivision (a) of Section 48853.5.

(4) "School" means a public school, including a charter school, that maintains any of grades 9 to 12, inclusive.

(5) "Unaccompanied youth" means an unaccompanied youth between 12 to 24 years of age, inclusive, who is experiencing homelessness, as defined in subsection (2) of Section 725 of the federal McKinney-Vento Homeless Assistance Act (42 U.S.C. Sec. 11434a(2)).

For purposes of this section, the following definitions apply:

(1) "Former juvenile court school pupil" means a pupil who, upon completion of the pupil's second year of high school, transfers to a school district or charter school, excluding a school district operated by the Division of Juvenile Justice of the Department of Corrections and Rehabilitation, from a juvenile court school.

Section 51225.2
Acceptance of coursework credit,
course retaking, complaint procedure
and notice

Section 51225.2

Acceptance of coursework credit, course retaking, complaint procedure and notice

(continued)

(2) "Local educational agency" means a school district, county office of education, or charter school.

(3) "Partial coursework satisfactorily completed" includes any portion of an individual course, even if the pupil did not complete the entire course.

(4) "Pupil in foster care" has the same meaning as "foster child," as that term is defined in subdivision (a) of Section 48853.5.

(5) "Pupil participating in a newcomer program" means a pupil who is participating in a program designed to meet the academic and transitional needs of newly arrived immigrant pupils that has as a primary objective the development of English language proficiency.

(6) "Pupil who is a child of a military family" means a pupil who meets the definition of "children of military families" under Section 49701.

(7) "Pupil who is a homeless child or youth" means a pupil who meets the definition of "homeless children and youths" in Section 11434a(2) of Title 42 of the United States Code.

(8) "Pupil who is a migratory child" means a pupil who meets the definition of "currently migratory child" under subdivision (a) of Section 54441.

(b) (1) Notwithstanding any other law, a local educational agency shall issue, and the new local educational agency shall accept, full or partial credit for all full or partial coursework satisfactorily completed by a pupil in foster care, a pupil who is a homeless child or youth, a former juvenile court school pupil, a pupil who is a child of a military family, a pupil who is a migratory child, or a pupil participating in a newcomer program, while attending a public school, a juvenile court school, a charter school, a school in a country other than the United States, or a nonpublic, nonsectarian school.

(2) The transferring local educational agency shall issue the full and partial credits on an official transcript for the pupil and shall ensure the transcript includes all of the following:

(A) All full and partial credits and grades earned based on any measure of full or partial coursework being satisfactorily completed, including a determination of the days of enrollment or seat time, or both, if applicable, at a school of that local educational agency or a prior local educational agency, or any other public school, juvenile court school, charter school, school in a country other than the United States, or nonpublic, nonsectarian school.

(B) The credits and grades for each school and local educational agency listed separately so it is clear where they were earned.

(C) A complete record of the pupil's seat time, including both period attendance and days of enrollment.

(3) The new local educational agency shall transfer the credits and grades onto an official transcript of the new local educational agency for the pupil in the same manner as described in subparagraph (B) of paragraph (2) and pursuant to the requirements of subdivision (c).

(4) If the new school or new local educational agency has knowledge that the transcript from the transferring local educational agency may not include certain credits or grades for the pupil, it shall contact the prior local educational agency within two business days to request that the prior local educational agency issue full or partial credits pursuant to this paragraph. The prior local educational agency shall issue appropriate credits and provide all academic and other records to the new local educational agency within two business days of the request.

(5) For purposes of coursework completed by a pupil who is a child of a military family, "public school" includes schools operated by the United States Department of Defense.

(c) (1) The credits accepted pursuant to subdivision (b) shall be applied for enrollment purposes as specified in subdivision (d) to the same or equivalent course, if applicable, as the coursework completed in the prior public school, juvenile court school, charter school, school in a country other than the United States, or nonpublic, nonsectarian school.

(2) For purposes of the official transcript, the credits accepted pursuant to subdivision (b) shall be added to the credits earned from the same or equivalent course for purposes of calculating the total credits earned for the course but shall separately identify the school and local educational agency in which the credits were earned.

(d) A local educational agency shall not require a pupil in foster care, a pupil who is a homeless child or youth, a former juvenile court school pupil, a pupil who is a child of a military family, a pupil who is a migratory child, or a pupil participating in a newcomer program to retake a course if the pupil has satisfactorily completed the entire course in a public school, a juvenile court school, a charter school, a school in a country other than the United States, or a nonpublic, nonsectarian school. If the pupil did not complete the entire course, the local educational agency shall not require the pupil to retake the portion of the course the pupil completed unless the local educational agency, in consultation with the holder of educational rights for the pupil, finds that the pupil is reasonably able to complete the requirements in time to graduate from high school. When partial credit is awarded in a particular course, the pupil in foster care, the pupil who is a homeless child or youth, the former juvenile court school pupil, the pupil who is a child of a military family, the pupil who is a migratory child, or the pupil participating in a newcomer program shall be enrolled in the same or equivalent course, if applicable, so that the pupil may continue and complete the entire course.

Section 51225.2
**Acceptance of coursework credit,
course retaking, complaint procedure
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(continued)

(e) A pupil in foster care, a pupil who is a homeless child or youth, a former juvenile court school pupil, a pupil who is a child of a military family, a pupil who is a migratory child, or a pupil participating in a newcomer program shall not be prevented from retaking or taking a course to meet the eligibility requirements for admission to the California State University or the University of California.

(f) (1) A complaint of noncompliance with the requirements of this section may be filed with the local educational agency under the Uniform Complaint Procedures set forth in Chapter 5.1 (commencing with Section 4600) of Division 1 of Title 5 of the California Code of Regulations.

(2) A complainant not satisfied with the decision of a local educational agency may appeal the decision to the department pursuant to Chapter 5.1 (commencing with Section 4600) of Division 1 of Title 5 of the California Code of Regulations and shall receive a written decision regarding the appeal within 60 days of the department's receipt of the appeal.

(3) If a local educational agency finds merit in a complaint, or if the Superintendent finds merit in an appeal, the local educational agency shall provide a remedy to the affected pupil.

(4) Information regarding the requirements of this section shall be included in the annual notification distributed to, among others, pupils, parents or guardians of pupils, employees, and other interested parties pursuant to Section 4622 of Title 5 of the California Code of Regulations.

(a) A pupil shall complete all of the following while in grades 9 to 12, inclusive, in order to receive a diploma of graduation from high school:

(1) At least the following numbers of courses in the subjects specified, each course having a duration of one year, unless otherwise specified:

(A) Three courses in English.

(B) Two courses in mathematics. If the governing board of a school district requires more than two courses in mathematics for graduation, the governing board of the school district may award a pupil up to one mathematics course credit pursuant to Section 51225.35.

(C) Two courses in science, including biological and physical sciences.

(D) Three courses in social studies, including United States history and geography; world history, culture, and geography; a one-semester course in American government and civics; and a one-semester course in economics.

(E) One course in visual or performing arts, world language, or, commencing with the 2012-13 school year, career technical education.

(i) For purposes of satisfying the requirement specified in this subparagraph, a course in American Sign Language shall be deemed a course in world language.

(ii) For purposes of this subparagraph, "a course in career technical education" means a course in a district-operated career technical education program that is aligned to the career technical model curriculum standards and framework adopted by the state board, including courses through a regional occupational center or program operated by a county superintendent of schools or pursuant to a joint powers agreement

(iii) This subparagraph does not require a school or school district that currently does not offer career technical education courses to start new career technical education programs for purposes of this section.

(iv) If a school district or county office of education elects to allow a career technical education course to satisfy the requirement imposed by this subparagraph, the governing board of the school district or county office of education, before offering that alternative to pupils, shall notify parents, teachers, pupils, and the public at a regularly scheduled meeting of the governing board of all of the following:

(I) The intent to offer career technical education courses to fulfill the graduation requirement specified in this subparagraph.

(II) The impact that offering career technical education courses, pursuant to this subparagraph, will have on the availability of courses that meet the eligibility requirements for admission to the California State University and the University of California, and whether the career technical education courses to be offered pursuant to this subparagraph are approved to satisfy those eligibility requirements. If a school district elects to allow a career technical education course to satisfy the requirement imposed by this subparagraph, the school district shall comply with subdivision (I) of Section 48980.

(III) The distinction, if any, between the high school graduation requirements of the school district or county office of education, and the eligibility requirements for admission to the California State University and the University of California.

(F) Two courses in physical education, unless the pupil has been exempted pursuant to this code.

(G)(i) Commencing with pupils graduating in the 2029-30 school year, including for pupils enrolled in a charter school, a one-semester course in ethnic studies. A local educational agency, including a charter school, may require a full-year course in ethnic studies at its discretion. Commencing with the 2025-26 school year, a local educational agency, including a charter school, with pupils in grades 9 to 12, inclusive, shall offer at least a one-semester course in ethnic studies.

(ii) Subject to the course offerings of a local educational agency, including a charter school, a pupil

Section 51225.3
**High school graduation
requirements**

Charter schools exempted by
megawaiver
Ethnic studies coursework

Section 51225.3
High school graduation
requirements
(continued)

may fulfill the requirement of clause (i) through the completion of any of the following types of courses:

(I) A course based on the model curriculum developed pursuant to Section 51226.7.

(II) An existing ethnic studies course.

(III) An ethnic studies course taught as part of a course that has been approved as meeting the A-G requirements of the University of California and the California State University.

(IV) A locally developed ethnic studies course approved by the governing board of the school district or the governing body of the charter school. The proposed course shall first be presented at a public meeting of the governing board of the school district or the governing body of the charter school, and shall not be approved until a subsequent public meeting of the governing board or governing body at which the public has had the opportunity to express its views on the proposed course.

(iii) A course that does not use ethnic studies content as the primary content through which the subject is taught shall not be used to satisfy the requirement of clause (i).

(iv) A pupil completing a course described in clause (ii) shall also accrue credit for coursework in the subject that the course is offered, including, if applicable, credit towards satisfying a course required for a diploma of graduation from high school pursuant to this section.

(v) Curriculum, instruction, and instructional materials for a course described in clause (ii) shall meet all of the following requirements:

(I) Be appropriate for use with pupils of all races, religions, nationalities, genders, sexual orientations, and diverse ethnic and cultural backgrounds, pupils with disabilities, and English learners.

(II) Not reflect or promote, directly or indirectly, any bias, bigotry, or discrimination against any person or group of persons on the basis of any category protected by Section 220.

(III) Not teach or promote religious doctrine.

(vi) It is the intent of the Legislature that local educational agencies, including charter schools, consider that, pursuant to Section 51226.7, the Instructional Quality Commission undertook a lengthy, thorough, deliberative, and inclusive process before submitting a model curriculum in ethnic studies to the state board. To the extent that local educational agencies, including charter schools, choose to locally develop an ethnic studies program for approval by their governing board or governing body, it is the intent of the Legislature that local educational agencies not use the portions of the draft model curriculum that were not adopted by the Instructional Quality Commission due to concerns related to bias, bigotry, and discrimination.

(vii) The amendments made to this section by Section 1 of Chapter 661 of the Statutes of 2021 shall not be construed to alter any other requirement of this section for pupils enrolled in a charter school.

(2) Other coursework requirements adopted by the governing board of the school district.

(b) The governing board, with the active involvement of parents, administrators, teachers, and pupils, shall adopt alternative means for pupils to complete the prescribed course of study that may include practical demonstration of skills and competencies, supervised work experience or other outside school experience, career technical education classes offered in high schools, courses offered by regional occupational centers or programs, interdisciplinary study, independent study, and credit earned at a postsecondary educational institution. Requirements for graduation and specified alternative modes for completing the prescribed course of study shall be made available to pupils, parents, and the public.

(c) On or before July 1, 2017, the department shall submit a comprehensive report to the appropriate policy committees of the Legislature on the addition of career technical education courses to satisfy the requirement specified in subparagraph (E) of paragraph (1) of subdivision (a), including, but not limited to, the following information:

(1) A comparison of the pupil enrollment in career technical education courses, world language courses, and visual and performing arts courses for the 2005-06 to 2011-12 school years, inclusive, to the pupil enrollment in career technical education courses, world language courses, and visual and performing arts courses for the 2012-13 to 2016-17 school years, inclusive.

(2) The reasons, reported by school districts, that pupils give for choosing to enroll in a career technical education course to satisfy the requirement specified in subparagraph (E) of paragraph (1) of subdivision (a).

(3) The type and number of career technical education courses that were conducted for the 2005-06 to 2011-12 school years, inclusive, compared to the type and number of career technical education courses that were conducted for the 2012-13 to 2016-17 school years, inclusive.

(4) The number of career technical education courses that satisfied the subject matter requirements for admission to the University of California or the California State University.

(5) The extent to which the career technical education courses chosen by pupils are aligned with the California Career Technical Education Model Curriculum Standards, and prepare pupils for employment, advanced training, and postsecondary education.

(6) The number of career technical education courses that also satisfy the visual and performing arts requirement, and the number of career technical education courses that also satisfy the world language requirement.

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High school graduation requirements
(continued)

- (7) Annual pupil dropout and graduation rates for the 2011-12 to 2014-15 school years, inclusive.
- (d) For purposes of completing the report described in subdivision (c), the Superintendent may use existing state resources and federal funds. If state or federal funds are not available or sufficient, the Superintendent may apply for and accept grants, and receive donations and other financial support from public or private sources for purposes of this section.
- (e) For purposes of completing the report described in subdivision (c), the Superintendent may accept support, including, but not limited to, financial and technical support, from high school reform advocates, teachers, chamber organizations, industry representatives, research centers, parents, and pupils.
- (f) The amendments made to this section by Section 1 of Chapter 661 of the Statutes of 2021 shall become operative only upon an appropriation of funds by the Legislature for purposes of these amendments in the annual Budget Act or another statute.
- (g) This section shall become inoperative on the earlier of the following two dates:
- (1) On July 1, immediately following the first fiscal year after the enactment of Chapter 621 of the Statutes of 2011 in which the number of career technical education courses that, as determined by the department, satisfy the world language requirement for admission to the California State University and the University of California is at least twice the number of career technical education courses that meet these admission requirements as of January 1, 2012. This section shall be repealed on the following January 1, unless a later enacted statute, that becomes operative on or before that date, deletes or extends the dates on which it becomes inoperative and is repealed. It is the intent of the Legislature that new career technical education courses that satisfy the world language requirement for admission to the California State University and the University of California focus on world languages aligned with career preparation, emphasizing real-world application and technical content in related career and technical education courses.
- (2) On July 1, 2027, and, as of January 1, 2028, is repealed.

- (a) (1) Notwithstanding any other law, a local educational agency shall exempt an individual with exceptional needs who satisfies the eligibility criteria described in subdivision (b) from all courses and other requirements adopted by the governing board or governing body of the local educational agency that are additional to the statewide course requirements specified in Section 51225.3 and shall award the pupil a diploma of graduation from high school, as described in Section 7801(23)(A)(ii)(I)(bb) of Title 20 of the United States Code.
- (2) In accordance with Section 300.102(a)(3) of Title 34 of the Code of Federal Regulations, the award of a diploma of graduation from high school pursuant to this subdivision does not change a local educational agency's obligation to provide a free appropriate public education until 22 years of age, or otherwise constitute a change in placement.
- (b) An individual with exceptional needs, who entered ninth grade in the 2022-23 school year or later, shall be eligible for the exemption and award described in subdivision (a) if their individualized education program provides for all of the following:
- (1) The pupil's individualized education program team has deemed the pupil eligible to take the state alternate assessments as described in subdivision (k) of Section 60640.
- (2) The pupil is required to complete state standards aligned coursework to meet the statewide course requirements specified in Section 51225.3.
- (c) An individual with exceptional needs who meets the criteria for the alternative diploma pathway pursuant to this section shall be eligible to participate in any graduation ceremony and any school activity related to graduation with their grade-level peers with and without disabilities. Participation in graduation activities that are subject to this section shall not be construed as termination of the provision of free appropriate public education, consistent with Section 300.102(a)(3)(ii) of Title 34 of the Code of Federal Regulations, unless the individualized education program team has determined the pupil has completed their high school experience.
- (d) For purposes of this section, "local educational agency" includes a school district, county office of education, charter school, or state special school.

Notwithstanding any other law, if a pupil completed a career technical education course, between July 1, 2022, and the effective date of this section, that met the requirements of subparagraph (E) of paragraph (1) of subdivision (a) of Section 51225.3, as that section read on June 30, 2022, that course shall be deemed to have fulfilled the requirements of subparagraph (E) of paragraph (1) of subdivision (a) of Section 51225.3.

CPR INSTRUCTION
Education Code

- (a) If the governing board of a school district or the governing body of a charter school requires a course in health education for graduation from high school, the governing board of a school district or the governing body of a charter school shall include, commencing with the 2018-19

Section 51125.31
Individuals with special needs

Section 51225.9
Career technical education completion

Section 51225.6
CPR instruction included in high school health education course

Section 51225.6
CPR instruction
included in high school
health education course
(continued)

school year, instruction in performing compression-only cardiopulmonary resuscitation (CPR). This instruction shall include both of the following:(1) An instructional program based on national evidence-based emergency cardiovascular care guidelines for the performance of compression-only CPR, such as those developed by the American Heart Association or the American Red Cross. (2) Instruction to pupils relative to the psychomotor skills necessary to perform compression-only CPR. For purposes of this paragraph, "psychomotor skills" means skills that pupils are required to perform as hands-on practice to support cognitive learning.

(b) Before the commencement of the 2017-18 school year, the department shall provide guidance on how to implement this section, including, but not limited to, who may provide instruction pursuant to this section.

(c) The governing board of a school district or the governing body of a charter school is encouraged to provide to pupils general information on the use and importance of an automated external defibrillator (AED). The physical presence of an AED in the classroom is not required.

(d) The governing board of a school district or the governing body of a charter school may adopt policies to implement this section.

(e) (1) The governing board of a school district or the governing body of a charter school providing instruction in performing compression-only CPR or information on the use of an AED pursuant to this section is encouraged to use the most cost-effective means possible to implement that requirement.

(2) This section shall not be construed to require the governing board of a school district or the governing body of a charter school to make any purchases, including, but not limited to, purchasing an AED.

(f) (1) A local agency, entity of state or local government, or other public or private organization that sponsors, authorizes, supports, finances, or supervises the instruction of pupils in compression-only CPR or the use of an AED pursuant to this section shall not be liable for any civil damages alleged to result from the acts or omissions of an individual who received such instruction.

(2) A public employee who provides or facilitates the instruction of pupils in compression-only CPR or the use of an AED pursuant to this section shall not be liable for any civil damages alleged to result from the acts or omissions of an individual who received such instruction.

(3) This subdivision shall not be construed to grant immunity from civil damages to any person who provides or facilitates the instruction of pupils in compression-only CPR or the use of an AED in a manner that constitutes gross negligence or willful or wanton misconduct.

FINANCIAL AID INFORMATION
Education Code

Section 51225.7
Confirmation of completion of
FAFSA and Dream Act Forms

(a) For purposes of this section, the following definitions apply:

(1) "Local educational agency" means a school district, county office of education, or charter school.

(2) "Opt-out form" means a form developed by the Student Aid Commission that permits parents, legal guardians, a legally emancipated pupil, a pupil who is 18 years of age or older, or a local educational agency on a pupil's behalf to not fill out a Free Application for Federal Student Aid or California Dream Act Application for any reason.

(3) "Outreach program" means a nonprofit entity that is exempt from taxation pursuant to Section 501(c)(3) of the United States Internal Revenue Code or a public entity with experience in either or both of the following:

(A) Assisting pupils with financial aid application completion.

(B) Serving pupils who are eligible to submit a California Dream Act application.

(4) "Pupil" means a pupil in grade 12 attending a high school maintained by a local educational agency.

(b) Commencing with the 2022–23 school year, except as provided in subdivisions (c) and (d), the governing body of a local educational agency shall confirm that a pupil complies with at least one of the following:

(1) The pupil completes and submits to the United States Department of Education a Free Application for Federal Student Aid.

(2) If the pupil is exempt from paying nonresident tuition pursuant to Section 68130.5, the pupil completes and submits to the Student Aid Commission a form established pursuant to Section 69508.5 for purposes of the California Dream Act.

(c) The parent or legal guardian of the pupil, or the pupil if the pupil is a legally emancipated minor or 18 years of age or older, may opt out of the requirements of this section by filling out and submitting an opt-out form to the local educational agency. The Student Aid Commission shall make the opt-out form available to all local educational agencies pursuant to subdivision (h).

(d) If the local educational agency determines that a pupil is unable to complete a requirement of this section, the local educational agency shall exempt the pupil or, if applicable, the pupil's parent or legal guardian from completing and submitting a Free Application for Federal Student Aid, a form established pursuant to Section 69508.5 for purposes of the California Dream Act, or an

opt-out form pursuant to subdivision (c). If the local educational agency exempts the pupil from having to complete the requirements of this section, the local educational agency shall complete and submit an opt-out form on the pupil's behalf.

(e) The governing board or body of the local educational agency shall ensure both of the following:

(1) The local educational agency directs each high school pupil and, if applicable, the pupil's parent or legal guardian to any support and assistance services necessary to comply with the requirement described in subdivision (b) that may be available through outreach programs, including, but not limited to, those programs operated by the Student Aid Commission, postsecondary immigration resource centers, college readiness organizations, community-based organizations, and legal resource organizations.

(2) Information shared by parents, legal guardians, and pupils under this section is handled in compliance with the federal Family Educational Rights and Privacy Act of 2001 (20 U.S.C. Sec. 1232g) and applicable state laws, including Chapters 493 and 495 of the Statutes of 2017, regardless of any person's immigration status or other personal information, in order to protect all pupil and parent data to the fullest extent possible so that schools and all personal data remain safe.

(f) On or before September 1, 2022, and each year thereafter, the Student Aid Commission and the department shall facilitate the completion of the Free Application for Federal Student Aid and the form established pursuant to Section 69508.5 for purposes of the California Dream Act in the following manner:

(1) The department shall share the current school year's roster of pupils with the Student Aid Commission.

(2) The Student Aid Commission shall match the data described in paragraph (1) with a pupil's application status based on the data possessed by the Student Aid Commission related to submission of the Free Application for Federal Student Aid and the form established pursuant to Section 69508.5 for purposes of the California Dream Act.

(g) It is the intent of the Legislature that, upon the implementation of the California Cradle-to-Career Data System established in Section 10860, future data matching required by paragraph (2) of subdivision (f) be linked through, and conducted in accordance with the privacy requirements of, the California Cradle-to-Career Data System, to avoid a duplicative data matching requirement and to ensure data privacy.

(h) The Student Aid Commission shall, on or before July 1, 2022, adopt regulations that include, but are not limited to, model opt-out forms and acceptable use policies for the purpose of providing guidance on the requirements relating to state law in paragraph (2) of subdivision (e). The Student Aid Commission shall post and make available any model opt-out forms and policies established pursuant to this subdivision on its internet website.

(i) A pupil who does not fulfill the requirements of this section shall not be penalized or punished and this section shall not affect a pupil's ability to graduate.

(a) Commencing with the 2020-21 school year, the governing board of a school district and the governing body of a charter school, as appropriate, shall ensure that each of its pupils receives information on how to properly complete and submit the Free Application for Federal Student Aid (FAFSA) or the California Dream Act Application, as appropriate, at least once before the pupil enters grade 12. The manner in which information is provided pursuant to this section shall be at the discretion of the governing board of the school district or the governing body of the charter school, as appropriate, and may include, but not necessarily be limited to, information dissemination through in-class instruction, an existing program, family information sessions, or group or individual sessions with school counselors. The information provided shall include, but not necessarily be limited to, material related to all of the following:

(1) The types of documentation and personal information that each student financial aid application requires, including, but not necessarily limited to, documents relating to income taxes, finances and income, college choices, academic status, and personal identification such as social security or taxpayer identification numbers.

(2) An explanation of definitions used for each application. These definitions may include, but are not necessarily limited to, definitions of "legal guardianship," "household size," "parent," "dependent," and "taxable college grants and scholarships."

(3) Eligibility requirements for student financial aid that may be applied for using the FAFSA or the California Dream Act Application.

(4) Application timelines and submission deadlines.

(5) The importance of submitting applications early, especially when student financial aid is awarded on a first-come, first-served basis.

(b) The governing board of a school district and the governing body of a charter school shall ensure that a paper copy of the FAFSA or the California Dream Act Application is provided to each pupil, upon request by that pupil or upon request of a parent or guardian of that pupil.

(c) The governing board of a school district and the governing body of a charter school shall ensure that any information shared by parents, guardians, and pupils under this section is handled according to applicable state and federal privacy laws and regulations.

MENTAL HEALTH EDUCATION

Education Code

Section 51925

Mental health course requirements

Each school district, county office of education, state special school, and charter school that offers one or more courses in health education to pupils in middle school or high school shall include in those courses instruction in mental health that meets the requirements of this article. This section shall not be construed to limit a school district, county office of education, state special school, or charter school in offering or requiring instruction in mental health as specified in this article. This instruction shall include all of the following:

- (a) Reasonably designed instruction on the overarching themes and core principles of mental health.
- (b) Defining signs and symptoms of common mental health challenges. Depending on pupil age and developmental level, this may include defining conditions such as depression, suicidal thoughts and behaviors, schizophrenia, bipolar disorder, eating disorders, and anxiety, including post-traumatic stress disorder.
- (c) Elucidating the evidence-based services and supports that effectively help individuals manage mental health challenges.
- (d) Promoting mental health wellness and protective factors, which includes positive development, social and cultural connectedness and supportive relationships, resiliency, problem solving skills, coping skills, self-esteem, and a positive school and home environment in which pupils feel comfortable.
- (e) The ability to identify warning signs of common mental health problems in order to promote awareness and early intervention so that pupils know to take action before a situation turns into a crisis. This shall include instruction on both of the following:
 - (1) How to seek and find assistance from professionals and services within the school district that includes, but is not limited to, school counselors with a pupil personnel services credential, school psychologists, and school social workers, and in the community for themselves or others.
 - (2) Evidence-based and culturally responsive practices that are proven to help overcome mental health challenges.
- (f) The connection and importance of mental health to overall health and academic success and to co-occurring conditions, such as chronic physical conditions, chemical dependence, and substance abuse.
- (g) Awareness and appreciation about the prevalence of mental health challenges across all populations, races, ethnicities, and socioeconomic statuses, including the impact of race, ethnicity, and culture on the experience and treatment of mental health challenges.
- (h) Stigma surrounding mental health challenges and what can be done to overcome stigma, increase awareness, and promote acceptance. This shall include, to the extent possible, classroom presentations of narratives by trained peers and other individuals who have experienced mental health challenges and how they coped with their situations, including how they sought help and acceptance.

Section 51926

Instruction and materials requirements

Instruction and materials required pursuant to this article shall satisfy all of the following:

- (a) Be appropriate for use with pupils of all races, genders, sexual orientations, and ethnic and cultural backgrounds, pupils with disabilities, and English learners.
- (b) Be accessible to pupils with disabilities, including, but not limited to, providing a modified curriculum, materials and instruction in alternative formats, and auxiliary aids.
- (c) Not reflect or promote bias against any person on the basis of any category protected by Section 220.
- (d) Be coordinated with any existing on-campus mental health providers including, but not limited to, providers with a pupil personnel services credential, who may be immediately called upon by pupils for assistance.

Section 51927

Privacy and confidentiality rights

- (a) This article does not limit a pupil's health and mental health privacy or confidentiality rights.
- (b) A pupil receiving instruction pursuant to this article shall not be required to disclose their confidential health or mental health information at any time in the course of receiving that instruction, including, but not limited to, for the purpose of the peer component described in subdivision (h) of Section 51925.

Section 51928

Definitions

For purposes of this article, the following definitions apply:

- (a) "Age appropriate" has the same meaning as defined in Section 51931.
- (b) "English learner" has the same meaning as defined in Section 51931.
- (c) "Evidence-based" means verified or supported by research conducted in compliance with scientific methods and published in peer-reviewed journals, where appropriate, and recognized as accurate and objective by professional organizations and agencies with expertise in the mental health field.
- (d) "Instructors trained in the appropriate courses" means instructors with knowledge of the most recent evidence-based research on mental health.

Section 51929

Plan to expand instruction

On or before January 1, 2024, the department shall develop a plan to expand mental health instruction in California public schools.

SEXUAL HEALTH EDUCATION AND HIV PREVENTION EDUCATION
Education Code

Commencing with the 2019–20 school year, “school district” also includes charter schools.

All comprehensive sexual health education and HIV prevention education pursuant to Section 51934, whether taught or supplemented by school district personnel or by outside consultants or guest speakers pursuant to Section 51936, shall satisfy all of the following criteria:

- (a) Instruction and materials shall be age appropriate.
- (b) All factual information presented shall be medically accurate and objective.
- (c) All instruction and materials shall align with and support the purposes of this chapter as set forth in paragraphs (1) to (5), inclusive, of subdivision (b) of Section 51930 and may not be in conflict with them.
- (d)(1) Instruction and materials shall be appropriate for use with pupils of all races, genders, sexual orientations, and ethnic and cultural backgrounds, pupils with disabilities, and English learners.
- (2) Instruction and materials shall be made available on an equal basis to a pupil who is an English learner, consistent with the existing curriculum and alternative options for an English learner pupil as otherwise provided in this code.
- (3) Instruction and materials shall be accessible to pupils with disabilities, including, but not limited to, the provision of a modified curriculum, materials and instruction in alternative formats, and auxiliary aids.
- (4) Instruction and materials shall not reflect or promote bias against any person on the basis of any category protected by Section 220.
- (5) Instruction and materials shall affirmatively recognize that people have different sexual orientations and, when discussing or providing examples of relationships and couples, shall be inclusive of same-sex relationships.
- (6) Instruction and materials shall teach pupils about gender, gender expression, gender identity, and explore the harm of negative gender stereotypes.
- (e) Instruction and materials shall encourage a pupil to communicate with his or her parents, guardians, and other trusted adults about human sexuality and provide the knowledge and skills necessary to do so.
- (f) Instruction and materials shall teach the value of and prepare pupils to have and maintain committed relationships such as marriage.
- (g) Instruction and materials shall provide pupils with knowledge and skills they need to form healthy relationships that are based on mutual respect and affection, and are free from violence, coercion, and intimidation.
- (h) Instruction and materials shall provide pupils with knowledge and skills for making and implementing healthy decisions about sexuality, including negotiation and refusal skills to assist pupils in overcoming peer pressure and using effective decisionmaking skills to avoid high-risk activities.
- (i) Instruction and materials may not teach or promote religious doctrine.

(a) Each school district shall ensure that all pupils in grades 7 to 12, inclusive, receive comprehensive sexual health education and HIV prevention education from instructors trained in the appropriate courses. Each pupil shall receive this instruction at least once in junior high or middle school and at least once in high school. This instruction shall include all of the following:

- (1) Information on the nature of HIV, as well as other sexually transmitted infections, and their effects on the human body.
- (2) Information on the manner in which HIV and other sexually transmitted infections are and are not transmitted, including information on the relative risk of infection according to specific behaviors, including sexual activities and injection drug use.
- (3) Information that abstinence from sexual activity and injection drug use is the only certain way to prevent HIV and other sexually transmitted infections and abstinence from sexual intercourse is the only certain way to prevent unintended pregnancy. This instruction shall provide information about the value of delaying sexual activity while also providing medically accurate information on other methods of preventing HIV and other sexually transmitted infections and pregnancy.
- (4) Information about the effectiveness and safety of all federal Food and Drug Administration (FDA) approved methods that prevent or reduce the risk of contracting HIV and other sexually transmitted infections, including use of antiretroviral medication, consistent with the federal Centers for Disease Control and Prevention.
- (5) Information about the effectiveness and safety of reducing the risk of HIV transmission as a result of injection drug use by decreasing needle use and needle sharing.
- (6) Information about the treatment of HIV and other sexually transmitted infections, including how antiretroviral therapy can dramatically prolong the lives of many people living with HIV and reduce the likelihood of transmitting HIV to others.
- (7) Discussion about social views on HIV and AIDS, including addressing unfounded stereotypes and myths regarding HIV and AIDS and people living with HIV. This instruction shall emphasize that successfully treated HIV-positive individuals have a normal life expectancy, all people are at some risk of contracting HIV, and the only way to know if one is HIV-positive is to get tested.

Section 51931(g)(2)
Charter schools included

Section 51933
Sexual health and HIV prevention education criteria; instruction and materials required

Section 51934
Sexual health and HIV prevention education required for grades 7-12

Section 51934
Sexual health and HIV prevention
education required for grades 7-12
(continued)

(8) Information about local resources, how to access local resources, and pupils' legal rights to access local resources for sexual and reproductive health care such as testing and medical care for HIV and other sexually transmitted infections and pregnancy prevention and care, as well as local resources for assistance with sexual assault and intimate partner violence.

(9) Information about the effectiveness and safety of all FDA-approved contraceptive methods in preventing pregnancy, including, but not limited to, emergency contraception. Instruction on pregnancy shall include an objective discussion of all legally available pregnancy outcomes, including, but not limited to, all of the following:

(A) Parenting, adoption, and abortion.

(B) Information on the law on surrendering physical custody of a minor child 72 hours of age or younger, pursuant to Section 1255.7 of the Health and Safety Code and Section 271.5 of the Penal Code.

(C) The importance of prenatal care.

(10) Information about sexual harassment, sexual assault, sexual abuse, and human trafficking. Information on human trafficking shall include both of the following:

(A) Information on the prevalence, nature, and strategies to reduce the risk of human trafficking, techniques to set healthy boundaries, and how to safely seek assistance.

(B) Information on how social media and mobile device applications are used for human trafficking

(11) Information about adolescent relationship abuse and intimate partner violence, including the early warning signs thereof.

(b) A school district may provide optional instruction, as part of comprehensive sexual health education and HIV prevention education, regarding the potential risks and consequences of creating and sharing sexually suggestive or sexually explicit materials through cellular telephones, social networking Internet Web sites, computer networks, or other digital media.

Optional earlier than grade 7

(c) A school district may provide comprehensive sexual health education or HIV prevention education consisting of age-appropriate instruction earlier than grade 7 using instructors trained in the appropriate courses. A school district that elects to offer comprehensive sexual health education or HIV prevention education earlier than grade 7 may provide age appropriate and medically accurate information on any of the general topics contained in paragraphs (1) to (11), inclusive, of subdivision (a).

COLLEGE AND CAREER FAIRS

Education Code

Section 52770
Community college district and
stakeholder participation

(a) For purposes of this section, the following definitions apply:

(1) "Career fair" means an event where multiple private businesses, governmental agencies, university representatives, or career technical school representatives are invited by a local educational agency to present career options or career technical education options to pupils.

(2) "College fair" means an event where multiple college or university representatives are invited by a local educational agency to present college options to pupils.

(3) "Local educational agency" means a school district, county office of education, or charter school.

(b) (1) A local educational agency serving pupils in any of grades 9 to 12, inclusive, that is planning to hold a college or career fair shall notify each community college district that has overlapping jurisdiction with the local educational agency of the college or career fair and provide an opportunity for the community college district to participate in the college or career fair.

(2) A notice provided pursuant to paragraph (1) shall include both of the following:

(A) The planned date and time of the college or career fair.

(B) The planned location of the college or career fair.

(3) A notice provided pursuant to paragraph (1) shall be delivered to the community college district before the planned date of the college or career fair either by first-class mail or by email.

YOUTH FOOTBALL ACT

Health and Safety Code

Section 124241
Tackle football requirements

On and after January 1, 2021, a youth sports organization that conducts a tackle football program shall comply with all of the following requirements:

(a) A tackle football team shall not conduct more than two full-contact practices per week during the preseason and regular season.

(b) A tackle football team shall not hold a full-contact practice during the off-season.

(c) The full-contact portion of a practice shall not exceed 30 minutes in any single day.

(d) A coach shall annually receive a tackling and blocking certification from a nationally recognized program that emphasizes shoulder tackling, safe contact and blocking drills, and techniques designed to minimize the risk during contact by removing the involvement of youth tackle football participant's head from all tackling and blocking techniques.

(e) Each youth tackle football administrator, coach, and referee shall annually complete all of the following:

(1) The concussion and head injury education pursuant to Section 124235.

- (2) The Opioid Factsheet for Patients pursuant to Section 124236.
- (3) Training in the basic understanding of the signs, symptoms, and appropriate responses to heat-related illness.
- (f) Each parent or guardian of a youth tackle football participant shall receive concussion and head injury information for that athlete pursuant to Section 124235 and the Opioid Factsheet for Patients pursuant to Section 124236.
- (g) Each football helmet shall be reconditioned and recertified every other year, unless stated otherwise by the manufacturer. Only entities licensed by the National Operating Committee on Standards for Athletic Equipment shall perform the reconditioning and recertification. Every reconditioned and recertified helmet shall display a clearly recognizable mark or notice in the helmet indicating the month and year of the last certification.
- (h) A minimum of one certified emergency medical technician, state-licensed paramedic, or higher-level licensed medical professional shall be present during all preseason, regular season, and postseason games. The certified emergency medical technician, state-licensed paramedic, or higher-level licensed medical professional shall have the authority to provide prehospital emergency medical care or rescue services consistent with their certification or license, and remove any youth tackle football participant from the game who exhibits an injury, including, but not necessarily limited to, symptoms of a concussion or other head injury.
- (i) A coach shall annually receive first aid, cardiopulmonary resuscitation, and automated external defibrillator certification.
- (j) At least one independent nonrostered individual, appointed by the youth sports organization, shall be present at all practice locations. The individual shall hold current and active certification in first aid, cardiopulmonary resuscitation, automated external defibrillator, and concussion protocols. The individual shall have the authority to evaluate and remove any youth tackle football participant from practice who exhibits an injury, including, but not limited to, symptoms of a concussion or other head injury.
- (k) Safety equipment shall be inspected before every full-contact practice or game to ensure that all youth tackle football participants are properly equipped.
- (l) Each youth tackle football participant removed pursuant to this section shall comply with Section 124235. The injury shall be reported to the youth tackle football league.
- (m) Each youth tackle football participant shall complete a minimum of 10 hours of noncontact practice at the beginning of each season for the purpose of conditioning, acclimating to safety equipment, and progressing to the introduction of full-contact practice. During this noncontact practice, the youth tackle football participants shall not wear any pads, and shall only wear helmets if required to do so by the coaches.
- (n) A youth sports organization shall annually provide a declaration to its youth tackle football league stating that it is in compliance with this article, and shall either post the declaration on its internet website or provide the declaration to all youth tackle football participants within its youth sports organization.

IMMUNIZATION AND VACCINATION REQUIREMENTS

Health and Safety Code

In enacting this chapter, but excluding Section 120380, and in enacting Sections 120400, 120405, 120410, and 120415, it is the intent of the Legislature to provide:

- (a) A means for the eventual achievement of total immunization of appropriate age groups against the following childhood diseases:
- (1) Diphtheria.
 - (2) Hepatitis B.
 - (3) Haemophilus influenzae type b.
 - (4) Measles.
 - (5) Mumps.
 - (6) Pertussis (whooping cough).
 - (7) Poliomyelitis.
 - (8) Rubella.
 - (9) Tetanus.
 - (10) Varicella (chickenpox).
- (11) Any other disease deemed appropriate by the department, taking into consideration the recommendations of the Advisory Committee on Immunization Practices of the United States Department of Health and Human Services, the American Academy of Pediatrics, and the American Academy of Family Physicians.
- (b) That the persons required to be immunized be allowed to obtain immunizations from whatever medical source they so desire, subject only to the condition that the immunization be performed in accordance with the regulations of the department and that a record of the immunization is made in accordance with the regulations.
- (c) Exemptions from immunization for medical reasons.

Section 120325

Legislative intent of immunization requirements

Section 120325
Legislative intent of
immunization requirements
(continued)

(d) For the keeping of adequate records of immunization so that health departments, schools, and other institutions, parents or guardians, and the persons immunized will be able to ascertain that a child is fully or only partially immunized, and so that appropriate public agencies will be able to ascertain the immunization needs of groups of children in schools or other institutions.
(e) Incentives to public health authorities to design innovative and creative programs that will promote and achieve full and timely immunization of children.

Section 120335
Immunization requirements
and exemptions

Immunizations required

(a) As used in this chapter, "governing authority" means the governing board of each school district or the authority of each other private or public institution responsible for the operation and control of the institution or the principal or administrator of each school or institution.
(b) The governing authority shall not unconditionally admit any person as a pupil of any private or public elementary or secondary school, child care center, day nursery, nursery school, family day care home, or development center, unless, prior to his or her first admission to that institution, he or she has been fully immunized. The following are the diseases for which immunizations shall be documented:

- (1) Diphtheria.
- (2) Haemophilus influenzae type b.
- (3) Measles.
- (4) Mumps.
- (5) Pertussis (whooping cough).
- (6) Poliomyelitis.
- (7) Rubella.
- (8) Tetanus.
- (9) Hepatitis B.
- (10) Varicella (chickenpox).

Additional immunizations in grade 7

(11) Any other disease deemed appropriate by the department, taking into consideration the recommendations of the Advisory Committee on Immunization Practices of the United States Department of Health and Human Services, the American Academy of Pediatrics, and the American Academy of Family Physicians.

(c) Notwithstanding subdivision (b), full immunization against hepatitis B shall not be a condition by which the governing authority shall admit or advance any pupil to the 7th grade level of any private or public elementary or secondary school.

Home school exemption

(d) The governing authority shall not unconditionally admit or advance any pupil to the 7th grade level of any private or public elementary or secondary school unless the pupil has been fully immunized against pertussis, including all pertussis boosters appropriate for the pupil's age.

(e) The department may specify the immunizing agents that may be utilized and the manner in which immunizations are administered.

Phase-out of
personal belief exemption

(f) This section does not apply to a pupil in a home-based private school or a pupil who is enrolled in an independent study program pursuant to Article 5.5 (commencing with Section 51745) of Chapter 5 of Part 28 of the Education Code and does not receive classroom-based instruction.

(g)(1) A pupil who, prior to January 1, 2016, submitted a letter or affidavit on file at a private or public elementary or secondary school, child day care center, day nursery, nursery school, family day care home, or development center stating beliefs opposed to immunization shall be allowed enrollment to any private or public elementary or secondary school, child day care center, day nursery, nursery school, family day care home, or development center within the state until the pupil enrolls in the next grade span.

"Grade span" defined

(2) For purposes of this subdivision, "grade span" means each of the following:

- (A) Birth to preschool.
- (B) Kindergarten and grades 1 to 6, inclusive, including transitional kindergarten.
- (C) Grades 7 to 12, inclusive.

Immunizations mandatory for
advancement or admission to grade 7

(3) Except as provided in this subdivision, on and after July 1, 2016, the governing authority shall not unconditionally admit to any of those institutions specified in this subdivision for the first time, or admit or advance any pupil to 7th grade level, unless the pupil has been immunized for his or her age as required by this section.

(h) This section does not prohibit a pupil who qualifies for an individualized education program, pursuant to federal law and Section 56026 of the Education Code, from accessing any special education and related services required by his or her individualized education program.

Section 120338
Additional immunization
requirements for first admission

Notwithstanding Sections 120325 and 120335, any immunizations deemed appropriate by the department pursuant to paragraph (11) of subdivision (a) of Section 120325 or paragraph (11) of subdivision (b) of Section 120335, may be mandated before a pupil's first admission to any private or public elementary or secondary school, child care center, day nursery, nursery school, family day care home, or development center, only if exemptions are allowed for both medical reasons and personal beliefs.

The requirements of Chapter 1 (commencing with Section 120325, but excluding Section 120380) and of Sections 120400, 120405, 120410, and 120415 shall not apply to any person 18 years of age or older, or to any person seeking admission to a community college.

**Section 120360
Immunization requirements
do not apply to adults**

(a) (1) Prior to January 1, 2021, if the parent or guardian files with the governing authority a written statement by a licensed physician and surgeon to the effect that the physical condition of the child is such, or medical circumstances relating to the child are such, that immunization is not considered safe, indicating the specific nature and probable duration of the medical condition or circumstances, including, but not limited to, family medical history, for which the physician and surgeon does not recommend immunization, that child shall be exempt from the requirements of this chapter, except for Section 120380, and exempt from Sections 120400, 120405, 120410, and 120415 to the extent indicated by the physician and surgeon's statement.

**Section 120370
Requirements for medical
exemption from immunization**

(2) Commencing January 1, 2020, a child who has a medical exemption issued before January 1, 2020, shall be allowed continued enrollment to any public or private elementary or secondary school, child care center, day nursery, nursery school, family day care home, or developmental center within the state until the child enrolls in the next grade span.

For purposes of this subdivision, "grade span" means each of the following:

(A) Birth to preschool, inclusive.

(B) Kindergarten and grades 1 to 6, inclusive, including transitional kindergarten.

(C) Grades 7 to 12, inclusive.

(3) Except as provided in this subdivision, on and after July 1, 2021, the governing authority shall not unconditionally admit or readmit to any of those institutions specified in this subdivision, or admit or advance any pupil to 7th grade level, unless the pupil has been immunized pursuant to Section 120335 or the parent or guardian files a medical exemption form that complies with Section 120372.

(b) If there is good cause to believe that a child has been exposed to a disease listed in subdivision (b) of Section 120335 and the child's documentary proof of immunization status does not show proof of immunization against that disease, that child may be temporarily excluded from the school or institution until the local health officer is satisfied that the child is no longer at risk of developing or transmitting the disease.

(a) (1) By January 1, 2021, the department shall develop and make available for use by licensed physicians and surgeons an electronic, standardized, statewide medical exemption certification form that shall be transmitted directly to the department's California Immunization Registry (CAIR) established pursuant to Section 120440. Pursuant to Section 120375, the form shall be printed, signed, and submitted directly to the school or institution at which the child will attend, submitted directly to the governing authority of the school or institution, or submitted to that governing authority through the CAIR where applicable. Notwithstanding Section 120370, commencing January 1, 2021, the standardized form shall be the only documentation of a medical exemption that the governing authority may accept.

**Section 120372
Medical exemptions**

(2) At a minimum, the form shall require all of the following information:

(A) The name, California medical license number, business address, and telephone number of the physician and surgeon who issued the medical exemption, and of the primary care physician of the child, if different from the physician and surgeon who issued the medical exemption.

(B) The name of the child for whom the exemption is sought, the name and address of the child's parent or guardian, and the name and address of the child's school or other institution.

(C) A statement certifying that the physician and surgeon has conducted a physical examination and evaluation of the child consistent with the relevant standard of care and complied with all applicable requirements of this section.

(D) Whether the physician and surgeon who issued the medical exemption is the child's primary care physician. If the issuing physician and surgeon is not the child's primary care physician, the issuing physician and surgeon shall also provide an explanation as to why the issuing physician and not the primary care physician is filling out the medical exemption form.

(E) How long the physician and surgeon has been treating the child.

(F) A description of the medical basis for which the exemption for each individual immunization is sought. Each specific immunization shall be listed separately and space on the form shall be provided to allow for the inclusion of descriptive information for each immunization for which the exemption is sought.

(G) Whether the medical exemption is permanent or temporary, including the date upon which a temporary medical exemption will expire. A temporary exemption shall not exceed one year. All medical exemptions shall not extend beyond the grade span, as defined in Section 120370.

(H) An authorization for the department to contact the issuing physician and surgeon for purposes of this section and for the release of records related to the medical exemption to the department, the Medical Board of California, and the Osteopathic Medical Board of California.

(I) A certification by the issuing physician and surgeon that the statements and information contained in the form are true, accurate, and complete.

(3) An issuing physician and surgeon shall not charge for either of the following:

(A) Filling out a medical exemption form pursuant to this section.

(B) A physical examination related to the renewal of a temporary medical exemption.

Section 120372
Medical exemptions

(continued)

(b) Commencing January 1, 2021, if a parent or guardian requests a licensed physician and surgeon to submit a medical exemption for the parent's or guardian's child, the physician and surgeon shall inform the parent or guardian of the requirements of this section. If the parent or guardian consents, the physician and surgeon shall examine the child and submit a completed medical exemption certification form to the department. A medical exemption certification form may be submitted to the department at any time.

(c) By January 1, 2021, the department shall create a standardized system to monitor immunization levels in schools and institutions as specified in Sections 120375 and 120440, and to monitor patterns of unusually high exemption form submissions by a particular physician and surgeon.

(d) (1) The department, at a minimum, shall annually review immunization reports from all schools and institutions in order to identify medical exemption forms submitted to the department and under this section that will be subject to paragraph (2).

(2) A clinically trained immunization department staff member, who is either a physician and surgeon or a registered nurse, shall review all medical exemptions from any of the following:

(A) Schools or institutions subject to Section 120375 with an overall immunization rate of less than 95 percent.

(B) Physicians and surgeons who have submitted five or more medical exemptions in a calendar year beginning January 1, 2020.

(C) Schools or institutions subject to Section 120375 that do not provide reports of vaccination rates to the department.

(3) (A) The department shall identify those medical exemption forms that do not meet applicable CDC, ACIP, or AAP criteria for appropriate medical exemptions. The department may contact the primary care physician and surgeon or issuing physician and surgeon to request additional information to support the medical exemption.

(B) Notwithstanding subparagraph (A), the department, based on the medical discretion of the clinically trained immunization staff member, may accept a medical exemption that is based on other contraindications or precautions, including consideration of family medical history, if the issuing physician and surgeon provides written documentation to support the medical exemption that is consistent with the relevant standard of care.

(C) A medical exemption that the reviewing immunization department staff member determines to be inappropriate or otherwise invalid under subparagraphs (A) and (B) shall also be reviewed by the State Public Health Officer or a physician and surgeon from the department's immunization program designated by the State Public Health Officer. Pursuant to this review, the State Public Health Officer or physician and surgeon designee may revoke the medical exemption.

(4) Medical exemptions issued prior to January 1, 2020, shall not be revoked unless the exemption was issued by a physician or surgeon that has been subject to disciplinary action by the Medical Board of California or the Osteopathic Medical Board of California.

(5) The department shall notify the parent or guardian, issuing physician and surgeon, the school or institution, and the local public health officer with jurisdiction over the school or institution of a denial or revocation under this subdivision.

(6) If a medical exemption is revoked pursuant to this subdivision, the child shall continue in attendance. However, within 30 calendar days of the revocation, the child shall commence the immunization schedule required for conditional admittance under Chapter 4 (commencing with Section 6000) of Division 1 of Title 17 of the California Code of Regulations in order to remain in attendance, unless an appeal is filed pursuant to Section 120372.05 within that 30-day time period, in which case the child shall continue in attendance and shall not be required to otherwise comply with immunization requirements unless and until the revocation is upheld on appeal.

(7) (A) If the department determines that a physician's and surgeon's practice is contributing to a public health risk in one or more communities, the department shall report the physician and surgeon to the Medical Board of California or the Osteopathic Medical Board of California, as appropriate. The department shall not accept a medical exemption form from the physician and surgeon until the physician and surgeon demonstrates to the department that the public health risk no longer exists, but in no event shall the physician and surgeon be barred from submitting these forms for less than two years.

(B) If there is a pending accusation against a physician and surgeon with the Medical Board of California or the Osteopathic Medical Board of California relating to immunization standards of care, the department shall not accept a medical exemption form from the physician and surgeon unless and until the accusation is resolved in favor of the physician and surgeon.

(C) If a physician and surgeon licensed with the Medical Board of California or the Osteopathic Medical Board of California is on probation for action relating to immunization standards of care, the department and governing authority shall not accept a medical exemption form from the physician and surgeon unless and until the probation has been terminated.

(8) The department shall notify the Medical Board of California or the Osteopathic Medical Board of California, as appropriate, of any physician and surgeon who has five or more medical exemption forms in a calendar year that are revoked pursuant to this subdivision.

Section 120372
Medical exemptions
(continued)

(9) Notwithstanding any other provision of this section, a clinically trained immunization program staff member who is a physician and surgeon or a registered nurse may review any exemption in the CAIR or other state database as necessary to protect public health.

(e) The department, the Medical Board of California, and the Osteopathic Medical Board of California shall enter into a memorandum of understanding or similar agreement to ensure compliance with the requirements of this section.

(f) In administering this section, the department and the independent expert review panel created pursuant to Section 120372.05 shall comply with all applicable state and federal privacy and confidentiality laws. The department may disclose information submitted in the medical exemption form in accordance with Section 120440, and may disclose information submitted pursuant to this chapter to the independent expert review panel for the purpose of evaluating appeals.

(g) The department shall establish the process and guidelines for review of medical exemptions pursuant to this section. The department shall communicate the process to providers and post this information on the department's website.

(h) If the department or the California Health and Human Services Agency determines that contracts are required to implement or administer this section, the department may award these contracts on a single-source or sole-source basis. The contracts are not subject to Part 2 (commencing with Section 10100) of Division 2 of the Public Contract Code, Article 4 (commencing with Section 19130) of Chapter 5 of Part 2 of Division 5 of Title 2 of the Government Code, or Sections 4800 to 5180, inclusive, of the State Administrative Manual as they relate to approval of information technology projects or approval of increases in the duration or costs of information technology projects.

(i) Notwithstanding the rulemaking provisions of the Administrative Procedure Act (Chapter 3.5 (commencing with Section 11340) of Part 1 of Division 3 of Title 2 of the Government Code), the department may implement and administer this section through provider bulletins, or similar instructions, without taking regulatory action.

(j) For purposes of administering this section, the department and the California Health and Human Services Agency appeals process shall be exempt from the rulemaking and administrative adjudication provisions in the Administrative Procedure Act Chapter 3.5 (commencing with Section 11340), Chapter 4 (commencing with Section 11370), Chapter 4.5 (commencing with 11400), and Chapter 5 (commencing with Section 11500) of Part 1 of Division 3 of Title 2 of the Government Code.

(a) A medical exemption revoked pursuant to Section 120372 may be appealed by a parent or guardian to the Secretary of California Health and Human Services. Parents, guardians, or the physician who issued the medical exemption may provide necessary information for purposes of the appeal.

(b) The secretary shall establish an independent expert review panel, consisting of three licensed physicians and surgeons who have relevant knowledge, training, and experience relating to primary care or immunization to review appeals. The agency shall establish the process and guidelines for the appeals process pursuant to this section, including the process for the panel to contact the issuing physician and surgeon, parent, or guardian. The agency shall post this information on the agency's internet website. The agency shall also establish requirements, including conflict-of-interest standards, consistent with the purposes of this chapter, that a physician and surgeon shall meet in order to qualify to serve on the panel.

(c) The independent expert review panel shall evaluate appeals consistent with the federal Centers for Disease Control and Prevention, federal Advisory Committee on Immunization Practices, or American Academy of Pediatrics guidelines or the relevant standard of care, as applicable.

(d) The independent expert review panel shall submit its determination to the secretary. The secretary shall adopt the determination of the independent expert review panel and shall promptly issue a written decision to the child's parent or guardian. The decision shall not be subject to further administrative review.

(e) A child whose medical exemption revocation pursuant to subdivision (d) of Section 120372 is appealed under this section shall continue in attendance and shall not be required to commence the immunization required for conditional admittance under Chapter 4 (commencing with Section 6000) of Division 1 of Title 17 of the California Code of Regulations, provided that the appeal is filed within 30 calendar days of revocation of the medical exemption.

(f) For purposes for administering this section, the department and the California Health and Human Services Agency appeals process shall be exempt from the rulemaking and administrative adjudication provisions in the Administrative Procedure Act (Chapter 3.5 (commencing with Section 11340), Chapter 4 (commencing with Section 11370), Chapter 4.5 (commencing with 11400), and Chapter 5 (commencing with Section 11500) of Part 1 of Division 3 of Title 2 of the Government Code).

(a) The governing authority of each school or institution included in Section 120335 shall require documentary proof of each entrant's immunization status. The governing authority shall record the immunizations of each new entrant in the entrant's permanent enrollment

Section 120372.05
Appeal of revoked medical exemption; procedures

Section 120375
Documentary proof of immunizations

Section 120375
Documentary proof
of immunizations
(continued)

and scholarship record on a form provided by the department. The immunization record of each new entrant admitted conditionally shall be reviewed periodically by the governing authority to ensure that within the time periods designated by regulation of the department the entrant has been fully immunized against all of the diseases listed in Section 120335, and immunizations received after entry shall be added to the pupil's immunization record.

(b) The governing authority of each school or institution included in Section 120335 shall prohibit from further attendance any pupil admitted conditionally who failed to obtain the required immunizations within the time limits allowed in the regulations of the department until that pupil has been fully immunized against all of the diseases listed in Section 120335, unless the pupil is exempted under Section 120370 or 120372.

(c) The governing authority shall file a written report, on at least an annual basis, on the immunization status of new entrants to the school or institution under their jurisdiction with the department and the local health department on forms prescribed by the department. As provided in paragraph (4) of subdivision (a) of Section 49076 of the Education Code, the local health department shall have access to the complete health information as it relates to immunization of each student in the schools or other institutions listed in Section 120335 in order to determine immunization deficiencies.

(d) The governing authority shall cooperate with the county health officer in carrying out programs for the immunization of persons applying for admission to any school or institution under its jurisdiction. The governing board of any school district may use funds, property, and personnel of the district for that purpose. The governing authority of any school or other institution may permit any licensed physician or any qualified registered nurse to administer immunizing agents to any person seeking admission to any school or institution under its jurisdiction.

PART VI: LAWS RELATED TO EMPLOYMENT, TEACHERS AND CONTRACTORS

SCHOOL EMPLOYEE WAGE OVERPAYMENT

Education Code

(a) (1) When a school employer determines a wage overpayment has been made to a school employee, it shall notify the employee in writing of the overpayment, afford the employee an opportunity to respond before commencing recoupment actions, and inform the school employee of their rights specified in paragraph (4). If the school employee agrees that the school employer overpaid them in the claimed amount, reimbursement shall be made to the school employer through one of the following methods mutually agreed to by the employee and the school employer:

(A) Cash payment or cash installment payments.

(B) Installment payments through payroll deduction covering at least the same number of pay periods in which the error occurred.

(C) The adjustment of appropriate leave credits or compensating time off, provided that the overpayment involves the accrual or crediting of leave credits such as vacation, annual leave, holiday leave, or compensating time off. Any errors in sick leave balances shall only be adjusted with sick leave credits.

(2) Installment payment amounts deducted from an employee's salary or wages pursuant to paragraph (1), except as provided in subdivision (b), shall not exceed the amounts specified in Section 706.050 of the Code of Civil Procedure.

(3) Absent mutual agreement on a method of reimbursement pursuant to paragraph (1), within 30 days of the school employee verifying the overpayment amount the school employer shall proceed with recoupment pursuant to subparagraph (B) of paragraph (1).

(4) If a school employee disputes the existence or amount of a school employer's claimed overpayment made to the school employee, the school employer shall first initiate a legal action and obtain a court order or a binding arbitration decision validating the claimed overpayment amount before it may recover the overpayment amount. For purposes of this paragraph, binding arbitration may apply only when a memorandum of understanding between the school employer and an exclusive representative of the school employee sets forth procedures for adjudicating wage overpayment disputes that, at a minimum, meet the requirements and protections for school employees set forth in this section. If in court the school employee is represented by counsel supplied by the exclusive representative designated under the Educational Employment Relations Act (Chapter 10.7 (commencing with Section 3540) of Division 4 of Title 1 of the Government Code), then the provisions of subdivision (b) of Section 3543.8 of the Government Code shall apply to that litigation.

(b) A school employee who is separated from employment before full repayment of the overpayment amount owed pursuant to subdivision (a) shall have an amount sufficient to provide full repayment withheld from any money owed to the employee upon separation, provided that the state minimum wage is still paid to the school employee. If the amount of money owed to the employee upon separation is insufficient to provide full reimbursement to the school employer, the school employer shall have the right to exercise any and all other legal means to recover the additional amount owed.

(c) A legal action shall not be taken by the school employer pursuant to this section to recover an overpayment unless the action is initiated within three years from the date of overpayment. The school employer shall not recover overpayments made to a school employee more than three years before the school employer initiates the action. If an overpayment involves leave credits, the date of overpayment is the date that the school employee receives compensation in exchange for leave erroneously credited to the employee. For purposes of this section, leave hours are considered exchanged for compensation in the order they were credited.

(d) If the provisions of this section are in conflict with the provisions of a memorandum of understanding reached pursuant to Chapter 10.7 (commencing with Section 3540) of Division 4 of Title 1 of the Government Code, that was in effect on July 31, 2022, the memorandum of understanding shall be controlling until the expiration or renewal of the memorandum of understanding.

(e) For purposes of this section, "school employer" means the applicable administrative entity of any of the following:

(1) School district.

(2) County office of education.

(3) Charter school.

MANDATORY CHILD ABUSE PREVENTION TRAINING

Education Code

(a) The State Department of Education, in consultation with the Office of Child Abuse Prevention in the State Department of Social Services, shall do all of the following:

(1) Develop and disseminate information to all school districts, county offices of education, state special schools and diagnostic centers operated by the State Department of Education, and

Section 44042.5

Wage overpayment procedure

Section 44691

Mandated training

Section 44691
Mandated training
(continued)

	<p>charter schools, and their school personnel in California, regarding the detection and reporting of child abuse.</p> <p>(2) Provide statewide guidance on the responsibilities of mandated reporters who are school personnel in accordance with the Child Abuse and Neglect Reporting Act (Article 2.5 (commencing with Section 11164) of Chapter 2 of Title 1 of Part 4 of the Penal Code). This guidance shall include, but not necessarily be limited to, both of the following:</p> <p>(A) Information on the identification of child abuse and neglect.</p> <p>(B) Reporting requirements for child abuse and neglect.</p>
Online training modules	<p>(3) Develop appropriate means of instructing school personnel in the detection of child abuse and neglect and the proper action that school personnel should take in suspected cases of child abuse and neglect, including, but not limited to, an online training module to be provided by the State Department of Social Services.</p> <p>(4) Establish best practices for school personnel to prevent abuse, including sexual abuse, of children on school grounds, by school personnel, or in school-sponsored programs, and post on the department's Internet Web site links to existing training resources.</p>
Charter schools to train	<p>(b) School districts, county offices of education, state special schools and diagnostic centers operated by the State Department of Education, and charter schools shall do both of the following:</p> <p>(1) Provide annual training, using the online training module provided by the State Department of Social Services or as provided in subdivision (c), to their employees and persons working on their behalf who are mandated reporters, as defined in Section 11165.7 of the Penal Code, pursuant to this section and subdivision (d) of Section 11165.7 of the Penal Code on the mandated reporting requirements. Mandated reporter training shall be provided to school personnel hired during the course of the school year. This training shall include information that failure to report an incident of known or reasonably suspected child abuse or neglect, as required by Section 11166 of the Penal Code, is a misdemeanor punishable by up to six months confinement in a county jail, or by a fine of one thousand dollars (\$1,000), or by both that imprisonment and fine.</p> <p>(2) Develop a process for all persons required to receive training pursuant to this section to provide proof of completing the training within the first six weeks of each school year or within the first six weeks of that person's employment. The process developed under this paragraph may include, but not necessarily be limited to, the use of a sign-in sheet or the submission of a certificate of completion to the applicable governing board or body of the school district, county office of education, state special school and diagnostic center, or charter school.</p>
Report use of alternative training	<p>(c) School districts, county offices of education, state special schools and diagnostic centers operated by the State Department of Education, and charter schools that do not use the online training module provided by the State Department of Social Services shall report to the State Department of Education the training being used in its place.</p> <p>(d) School districts, county offices of education, state special schools and diagnostic centers operated by the State Department of Education, and charter schools are encouraged to participate in training on the prevention of abuse, including sexual abuse, of children on school grounds, by school personnel, or in school-sponsored programs, and are also encouraged to provide all school employees with that training at least once every three years.</p>

FINGERPRINTING & CRIMINAL BACKGROUND STATUTES
Education Code

Section 44237
Applicants for
employment involving
contact with minor students

Definitions	<p>(a) Every person, firm, association, partnership, or corporation offering or conducting private school instruction on the elementary or high school level shall require each applicant for employment in a position requiring contact with minor pupils to submit two sets of fingerprints prepared for submittal by the employer to the Department of Justice for the purpose of obtaining criminal record summary information from the Department of Justice and the Federal Bureau of Investigation.</p> <p>(b) (1) As used in this section, "employer" means every person, firm, association, partnership, or corporation offering or conducting private school instruction on the elementary or high school level.</p> <p>(2) As used in this section, "employment" means the act of engaging the services of a person, who will have contact with pupils, to work in a position at a private school at the elementary or high school level on or after September 30, 1997, on a regular, paid full-time basis, regular, paid part-time basis, or paid full-time or part-time seasonal basis.</p> <p>(3) As used in this section, "applicant" means any person who is seriously being considered for employment by an employer.</p> <p>(4) This section does not apply to a secondary school pupil working at the school he or she attends or a parent or legal guardian working exclusively with his or her children.</p>
DOJ criminal background checks	<p>(c) (1) Upon receiving the identification cards, the Department of Justice shall ascertain whether the applicant has been arrested or convicted of any crime insofar as that fact can be ascertained from information available to the Department of Justice and forward the information to the employer</p>

Section 44237
Applicants for
employment involving
contact with minor students
(continued)

submitting the fingerprints no more than 15 working days after receiving the identification cards. The Department of Justice shall not forward information regarding criminal proceedings that did not result in a conviction but shall forward information on arrests pending adjudication.

(2) Upon implementation of an electronic fingerprinting system with terminals located statewide and managed by the Department of Justice, the Department of Justice shall ascertain the information required pursuant to this subdivision within three working days. If the Department of Justice cannot ascertain the information required pursuant to this subdivision within three working days, the Department of Justice shall notify the employer submitting the fingerprints that it cannot so ascertain the required information. This notification shall be delivered by telephone or email to the employer submitting the fingerprints. If the employer submitting the fingerprints is notified by the Department of Justice that it cannot ascertain the required information about a person, the employer shall not employ that person until the Department of Justice ascertains that information.

(3) The Department of Justice shall review the criminal record summary it obtains from the Federal Bureau of Investigation to ascertain whether an applicant for employment has a conviction, or an arrest pending final adjudication, for any sex offense, controlled substance offense, crime of violence, or serious or violent felony. The Department of Justice shall provide written notification to the private school employer only as to whether an applicant for employment has any convictions, or arrests pending final adjudication, for any of these crimes.

(d) An employer shall not employ a person until the Department of Justice completes its check of the state criminal history file as set forth in this section.

(e) (1) An employer shall not employ a person who has been convicted of a violent or serious felony or a person who would be prohibited from employment by a public school district pursuant to any provision of this code because of his or her conviction for any crime.

(2) A person who would be prohibited from employment by a private school pursuant to paragraph (1) shall not, on or after July 1, 1999, own or operate a private school offering instruction on the elementary or high school level.

(f) An employer shall request subsequent arrest service from the Department of Justice as provided under Section 11105.2 of the Penal Code.

(g) This section applies to any violent or serious offense that, if committed in this state, would have been punishable as a violent or serious felony.

(h) For purposes of this section, a violent felony is any felony listed in subdivision (c) of Section 667.5 of the Penal Code and a serious felony is any felony listed in subdivision (c) of Section 1192.7 of the Penal Code.

(i) Notwithstanding subdivision (e), a person shall not be denied employment or terminated from employment solely on the basis that the person has been convicted of a violent or serious felony if the person has obtained a certificate of rehabilitation and pardon pursuant to Chapter 3.5 (commencing with Section 4852.01) of Title 6 of Part 3 of the Penal Code.

(j) Notwithstanding subdivision (e), a person shall not be denied employment or terminated from employment solely on the basis that the person has been convicted of a serious felony that is not also a violent felony if that person can prove to the sentencing court of the offense in question, by clear and convincing evidence, that he or she has been rehabilitated for the purposes of school employment for at least one year. If the offense in question occurred outside this state, then the person may seek a finding of rehabilitation from the court in the county in which he or she is a resident.

(k) The commission shall make available to each private school a listing of all credentialholders who have had final adverse action taken against their credential. The information shall be identical to that made available to public schools in the state. The commission shall also send on a quarterly basis a complete and updated list of all teachers who have had their teaching credentials revoked or suspended, excluding teachers who have had their credentials reinstated, or who are deceased.

(l) The Department of Justice may charge a reasonable fee to cover costs associated with the processing, reviewing, and supplying of the criminal record summary as required by this section. The fee shall not exceed the actual costs incurred by the Department of Justice.

(m) Where reasonable access to the statewide electronic fingerprinting network is available, the Department of Justice may mandate electronic submission of the fingerprints and related information required by this section.

(n) All information obtained from the Department of Justice is confidential. Agencies handling Department of Justice information shall ensure the following:

(1) A recipient shall not disclose its contents or provide copies of information.

(2) Information received shall be stored in a locked file separate from other files, and shall only be accessible to the custodian of records.

(3) Information received shall be destroyed upon the hiring determination in accordance with subdivision (a) of Section 708 of Title 11 of the California Code of Regulations.

(4) Compliance with destruction, storage, dissemination, auditing, backgrounding, and training requirements as set forth in Sections 700 to 708, inclusive, of Title 11 of the California Code of Regulations and Section 11077 of the Penal Code governing the use and security of criminal offender record information is the responsibility of the entity receiving the information from the Department of Justice.

No employment until DOJ check is complete
No employment if convicted of violent or serious felony

Employer must request DOJ subsequent arrest service

Penal code lists of violent and serious felonies

Employment with certificate of rehabilitation and pardon

Employment with other proof or finding of rehabilitation

Requirements for handling confidential information

Section 44830.1
Certificated positions

	<p>(a) The governing board of a school district shall employ for positions requiring certification qualifications, only persons who possess the qualifications for those positions prescribed by law. It is contrary to the public policy of this state for a person or persons charged, by the governing boards, with the responsibility of recommending persons for employment by the boards to refuse or to fail to do so for reasons of race, color, religious creed, sex, or national origin of the applicants for that employment.</p> <p>b) This section applies to any violent or serious offense which, if committed in this state, would have been punishable as a violent or serious felony.</p> <p>(c)(1) For purposes of this section, a violent felony is any felony listed in subdivision (c) of Section 667.5 of the Penal Code and a serious felony is any felony listed in subdivision (c) of Section 1192.7 of the Penal Code.</p> <p>(2) For purposes of this section, a plea of nolo contendere to a serious or violent felony constitutes a conviction.</p> <p>(3) For purposes of this section, the term "school district" has the same meaning as defined in Section 41302.5.</p> <p>(d) When the governing board of any school district requests a criminal record summary of a temporary, substitute, or probationary certificated employee, two fingerprint cards, bearing the legible rolled and flat impressions of the person's fingerprints together with a personal description and the fee, shall be submitted, by any means authorized by the Department of Justice, to the Department of Justice.</p> <p>(e) When the Department of Justice ascertains that an individual who is an applicant for employment by a school district has been convicted of a violent or serious felony, or for purposes of implementing the prohibitions set forth in Section 44836, any sex offense, as defined in Section 44010, or any controlled substance offense, as defined in Section 44011, the department shall notify the school district of the criminal information pertaining to the applicant. The notification shall be delivered by telephone or electronic mail to the school district. The notification to the school district shall cease to be made once the statewide electronic fingerprinting network is returning responses within three working days. The Department of Justice shall send by first-class mail or electronic mail a copy of the criminal information to the Commission on Teacher Credentialing. The Department of Justice may charge a reasonable fee to cover the costs associated with processing, reviewing, and supplying the criminal record summary required by this section. In no event shall the fee exceed the actual costs incurred by the department.</p> <p>(f) Notwithstanding subdivision (a), a person shall not be denied employment or terminated from employment solely on the basis that the person has been convicted of a violent or serious felony if the person has obtained a certificate of rehabilitation and pardon pursuant to Chapter 3.5 (commencing with Section 4852.01) of Title 6 of Part 3 of the Penal Code.</p> <p>(g) Notwithstanding subdivision (f), a person shall not be denied employment or terminated from employment solely on the basis that the person has been convicted of a serious felony that is not also a violent felony if that person can prove to the sentencing court of the offense in question, by clear and convincing evidence, that he or she has been rehabilitated for the purposes of school employment for at least one year. If the offense in question occurred outside this state, then the person may seek a finding of rehabilitation from the court in the school district in which he or she is a resident.</p> <p>(h) Notwithstanding any other provision of law, when the Department of Justice notifies a school district by telephone or electronic mail that a current temporary employee, substitute employee, or probationary employee serving before March 15 of the employee's second probationary year, has been convicted of a violent or serious felony, that employee shall immediately be placed on leave without pay. When the school district receives written electronic notification of the fact of conviction from the Department of Justice, the employee shall be terminated automatically and without regard to any other procedure for termination specified in this code or school district procedures unless the employee challenges the record of the Department of Justice and the Department of Justice withdraws in writing its notification to the school district. Upon receipt of written withdrawal of notification from the Department of Justice, the employee shall immediately be reinstated with full restoration of salary and benefits for the period of time from the suspension without pay to the reinstatement.</p> <p>(i) An employer shall request subsequent arrest service from the Department of Justice as provided under Section 11105.2 of the Penal Code.</p> <p>(j) Notwithstanding Section 47610, this section applies to a charter school.</p> <p>(k) This section shall not apply to a certificated employee who applies to renew his or her credential when both of the following conditions have been met:</p> <p>(1) The employee's original application for credential was accompanied by that person's fingerprints.</p> <p>(2) The employee has either been continuously employed in one or more public school districts since the issuance or last renewal of his or her credential or his or her credential has not expired between renewals.</p> <p>(l) Nothing in this section shall prohibit a county superintendent of schools from issuing a temporary certificate to any person described in paragraph (1) or (2) of subdivision (k).</p> <p>(m) This section shall not prohibit a school district from hiring a certificated employee who became a permanent employee of another school district as of October 1, 1997.</p>
Penal Code lists of violent and serious felonies	
Temporary, substitute or probationary certificated employees	
Notification of criminal information	
Certificate of rehabilitation and pardon	
Serious felony that is not also a violent felony	
Immediate leave or termination without pay	
Employer must request DOJ subsequent arrest service Applies to charter schools Renewal of credential	
Temporary certificate	
Permanent employee of another district	

**Section 44830.1
Certificated positions**

(continued)
Requirements for handling
confidential information

(n) All information obtained from the Department of Justice is confidential. Every agency handling Department of Justice information shall ensure the following:

- (1) No recipient may disclose its contents or provide copies of information.
- (2) Information received shall be stored in a locked file separate from other files, and shall only be accessible to the custodian of records.
- (3) Information received shall be destroyed upon the hiring determination in accordance with subdivision (a) of Section 708 of Title 11 of the California Code of Regulations.
- (4) Compliance with destruction, storage, dissemination, auditing, backgrounding, and training requirements as set forth in Sections 700 through 708 inclusive, of Title 11 of the California Code of Regulations and Section 11077 of the Penal Code governing the use and security of criminal offender record information is the responsibility of the entity receiving the information from the Department of Justice.

(a) In addition to any other prohibition or provision, no person who has been convicted of a violent or serious felony shall be employed by a school district pursuant to this chapter. A school district shall not retain in employment a current classified employee who has been convicted of a violent or serious felony, and who is a temporary, substitute, or a probationary employee who has not attained permanent status.

(b) This section applies to any violent or serious offense which, if committed in this state, would have been punishable as a violent or serious felony.

(c)(1) For purposes of this section, a violent felony is any felony listed in subdivision (c) of Section 667.5 of the Penal Code and a serious felony is any felony listed in subdivision (c) of Section 1192.7 of the Penal Code.

(2) For purposes of this section, the term "school district" has the same meaning as defined in Section 41302.5.

(d) When the Department of Justice ascertains that an individual who is an applicant for employment by a school district has been convicted of a violent or serious felony, the department shall notify the school district of the criminal information pertaining to the applicant. The notification shall be delivered by telephone and shall be confirmed in writing and delivered to the school district by first-class mail.

(e) Notwithstanding subdivision (a), a person shall not be denied employment or terminated from employment solely on the basis that the person has been convicted of a violent or serious felony if the person has obtained a certificate of rehabilitation and pardon pursuant to Chapter 3.5 (commencing with Section 4852.01) of Title 6 of Part 3 of the Penal Code.

(f) Notwithstanding subdivision (e), a person shall not be denied employment or terminated from employment solely on the basis that the person has been convicted of a serious felony that is not also a violent felony if that person can prove to the sentencing court of the offense in question, by clear and convincing evidence, that he or she has been rehabilitated for the purposes of school employment for at least one year. If the offense in question occurred outside this state, then the person may seek a finding of rehabilitation from the court in the school district in which he or she is a resident.

(g) Notwithstanding any other provision of law, when the Department of Justice notifies a school district by telephone that a current temporary, substitute, or probationary employee who has not attained permanent status, has been convicted of a violent or serious felony, that employee shall immediately be placed on leave without pay. When the school district receives written notification of the fact of conviction from the Department of Justice, the employee shall be terminated automatically and without regard to any other procedure for termination specified in this code or school district procedures unless the employee challenges the record of the Department of Justice and the Department of Justice withdraws in writing its notification to the school district. Upon receipt of written withdrawal of notification from the Department of Justice, the employee shall immediately be reinstated with full restoration of salary and benefits for the period of time from the suspension without pay to the reinstatement.

(h) Notwithstanding Section 47610, this section applies to a charter school.

(a) Any entity that has a contract with a local educational agency shall ensure that any employee who interacts with pupils, outside of the immediate supervision and control of the pupil's parent or guardian or a school employee, has a valid criminal records summary as described in Section 44237. When the contracting entity performs the criminal background check, it shall immediately provide any subsequent arrest and conviction information it receives to any local educational agency that it is contracting with pursuant to the subsequent arrest service.

(b) (1) This section does not apply to an entity providing services to a local educational agency, as described in subdivision (a), in an emergency or exceptional situation, such as when pupil health or safety is endangered or when repairs are needed to make school facilities safe and habitable.

(2) Notwithstanding subdivision (a), an employee of any entity that has a contract with a local educational agency, and that offers work experience opportunities for pupils, including, but not limited to, opportunities pursuant to Section 51760, 52336, 52372, 52410, or 52460, Article 1

**Section 45122.1
No person convicted of a violent or serious felony shall be employed**

Violent or serious felony

Penal Code lists of
violent and serious felonies

Certification of
rehabilitation and pardon

Serious felony that is not
also a violent felony

Immediate leave or
termination without pay

Applies to charter schools

**Section 45125.1
Criminal background check
required for contractors who
may interact with pupils**

Section 45125.1
Criminal background check
required for contractors who
may interact with pupils
(continued)

Right to require
contractor background checks

No interaction with students
until DOJ ascertains no
serious or violent felony violation

(commencing with Section 52300), Article 5 (commencing with Section 52381), or Article 7 (commencing with Section 52450) of Chapter 9 of Part 28 of Division 4, Chapter 16.5 (commencing with Section 53070) of Part 28 of Division 4, Article 5 (commencing with Section 54690) of Chapter 9 of Part 29 of Division 4, or Part 54.5 (commencing with Section 88820) of Division 7 of Title 3, or workplace placements as part of a pupil's individualized education program, including, but not limited to, the services described in Article 3 (commencing with Section 56470) of Chapter 4.5 of Part 30 of Division 4, is not required to have a valid criminal records summary pursuant to subdivision (a) if all of the following requirements are met:

(A) At least one adult employee in the workplace during the pupil's work hours, who has direct contact with the pupil and has been designated by the employer as the employee of record who is responsible for the safety of the pupil, has a valid criminal records summary as described in Section 44237.

(B) A staff representative of the local educational agency makes at least one visitation every three weeks to consult with the pupil's workplace liaison, observe the pupil at the workplace, and check in with the pupil to ensure the pupil's health, safety, and welfare, including by addressing any concerns the pupil has raised.

(C) The parent or guardian of the pupil has signed a consent form regarding the pupil's work placement, attesting that the parent or guardian understands the duties assigned to the pupil and the nature of the workplace environment.

(3) If a pupil participates in services provided by a contractor as part of an independent study program and the pupil is under the immediate supervision and control of the pupil's parent or guardian during the provision of those services, the local educational agency shall do either of the following:

(A) Verify completion of a valid criminal records summary for all employees of the contractor who interact with the pupil.

(B) Ensure that the parent or guardian of the pupil has signed a consent form before the pupil's interaction with a person employed by the contractor, attesting that the parent or guardian understands that the person employed by the contractor has not completed a valid criminal records summary as described in Section 44237.

(c) On a case-by-case basis, a local educational agency may require an entity with whom it has a contract to comply with the requirements of this section for employees in addition to those described in subdivision (a). The entity shall prepare and submit those employee's fingerprints to the Department of Justice, as described in subdivision (a).

(d) (1) The Department of Justice shall ascertain whether the individual whose fingerprints were submitted to it pursuant to subdivision (a), (c), or (h) has been arrested or convicted of any crime insofar as that fact can be ascertained from information available to the Department of Justice. Upon implementation of an electronic fingerprinting system with terminals located statewide and managed by the Department of Justice, the Department of Justice shall ascertain the information required pursuant to this section within three working days. When the Department of Justice ascertains that an individual whose fingerprints were submitted to it pursuant to subdivision (a), (c), or (h) has a pending criminal proceeding for a felony as defined in Section 45122.1 or has been convicted of a felony as defined in Section 45122.1, the Department of Justice shall notify the employer designated by the individual of that fact. The notification shall be delivered by telephone or email to the employer.

(2) The Department of Justice, at its discretion, may notify the local educational agencies in instances when the employee is defined as having a pending criminal proceeding described in Section 45122.1 or has been convicted of a felony as defined in Section 45122.1.

(3) The Department of Justice shall forward one copy of the fingerprints to the Federal Bureau of Investigation to verify any record of previous arrests or convictions of the applicant. The Department of Justice shall review the criminal record summary it obtains from the Federal Bureau of Investigation and shall notify the employer only as to whether or not an applicant has any convictions or arrests pending adjudication for offenses that, if committed in California, would have been punishable as a violent or serious felony. The Department of Justice shall not provide any specific offense information received from the Federal Bureau of Investigation. The Department of Justice shall provide written notification to the contract employer only concerning whether an applicant for employment has any conviction or arrest pending final adjudication for any of those crimes, as specified in Section 45122.1, but shall not provide any information identifying any offense for which an existing employee was convicted or has an arrest pending final adjudication.

(e) (1) An entity having a contract as described in subdivision (a) or that is required to comply with this section for other employees pursuant to subdivision (c) shall not permit an employee to interact with pupils until the Department of Justice has ascertained that the employee has not been convicted of a felony as defined in Section 45122.1.

PART VII: REFERENCE LIST OF ADDITIONAL STATUTES AND REGULATIONS

GENERAL

- **Conflicts of Interest** — **Section 1090**, Government Code § 1090 et seq.
- **Conflicts of Interest** — **Political Reform Act**, Government Code § 87100; 2 Cal. Code Regs. §18700 et seq.
- **Cooperation with Immigration Authorities & the California Values Act**, Government Code § 7284 et seq.
- **Dolores Huerta Day Recognition (April 10)**, Education Code § 37222.20
- **Educational Equity for Immigration Status**, Education Code § 234.7, Government Code §§ 7285.1, 7285.2, 7285.3 and Labor Code §§ 90.2, 1019, 1019.1, 1019.2, 1019.4
- **Incompatible Offices**, Government Code § 1099
- **Instructional Materials, Publisher's and Manufacturer's Duties**, Education Code §§ 60061, 60063.5
- **Nonprofit Integrity Act of 2004**, Government Code § 12580 et seq.
- **Nonprofit Public Benefit Corporation Law**, Corporations Code § 5110 et seq.
- **Parent Trigger Schools**, Education Code § 53300 et seq.; 5 Cal. Code Regs. § 4800 et seq.
- **Public Records Act**, Government Code § 6250 et seq.
- **Ralph M. Brown Act**, Government Code § 54950 et seq.
- **Ralph M. Brown Act Exception for Employment Negotiations**, Government Code § 3549.1
- **Single Gender Schools**, Education Code § 232 et seq.
- **Tax Exempt Status**, Internal Revenue Code Section 510(c)(3) and Regulations; 26 U.S.C. § 501, 26 C.F.R. § 1.501(c)(3)-1; Revenue and Taxation Code § 23701d
- **Transportation Safety Plan**, Education Code 39831.3
- **Uniform Complaint Procedures**, 5 Cal. Code Regs § 4600 et seq.
- **Waivers**, Education Code § 33050

SPECIAL EDUCATION

- **Pupils with Disabilities**, Least Restrictive Environment, Education Code §§ 56049, 56049.1
- **Section 504 Plans**, Education Code § 270
- **Special Education**, Education Code § 56000 et seq.
- **Special Education Local Plan Areas (SELPA)**, Education Code § 56195 et seq.

SCHOOL FACILITIES USE AND LOCATION

- **Airport Proximity to School Site**, Education Code § 17215
- **California Environmental Quality Act (CEQA)**, Public Resource Code § 21000 et seq.
- **Civic Center Act**, Education Code § 38130 et seq.
- **Cybersecurity Resources and Coordination**, Government Code § 8586.5
- **Disruptive and Unauthorized Persons on Campus**, Penal Code §§ 626.4 – 626.85
- **Energy Efficiency Grants**, Public Resources Code § 26225 et. seq.
- **Federal Bond Borrowing Authority**, Education Code § 12001.7
- **Gun-Free School Zone Act**, Penal Code § 626.9 et seq., 26370, and 26405
- **Property Tax Exemption**, Revenue and Taxation Code § 202
- **Right of First Refusal for Surplus Property**, Education Code § 17457.5
- **School Facilities (Sale of Surplus Real Property)**, Education Code § 17462.3
- **Shade Structures**, Education Code §§ 17670 and 17671
- **The School Reopening Ventilation and Energy Efficiency Verification and Repair Program and the School Noncompliant Plumbing Fixture and Appliance Program (School Energy Efficiency Stimulus Program)**, Public Utilities Code § 1600 et seq.
- **Tobacco and Nicotine Products Prohibited**, Health & Safety Code § 104559
- **Water Bottles and Filling Stations**, Education Code § 38040 et seq.
- **Water-Conserving Faucets**, Education Code § 17584
- **Zero-Emission Buses**, Education Code §§ 17927 and 39803.5
- **Zoning Exemption**, Government Code § 53090 et seq.

SCHOOL FINANCING AND FUNDING

- **21st Century CCLC & ASSETS**, Education Code § 8420 et seq., 8484.7-8484.9.
- **After School Education and Safety (ASES) Grant Program**, Education Code § 8482 et seq.
- **American Rescue Plan Act of 2021 — Homeless Children and Youth**, Public Law 117-2, § 2001(b)
- **Antibias Education Grant Program**, Section 138 of AB 181 (Ch. 52, Statutes of 2022), as amended by Section 58 of AB 185 (Ch. 571, Statutes of 2022)
- **Attendance Accounting**, Education Code § 46000

- **Cal Grant Program – Data Submission Requirement**, Education Code § 69430 et seq.
- **California School Accounting Manual (CSAM)**, California Department of Education, <https://www.cde.ca.gov/fg/ac/sa/>
- **California School Finance Authority Act**, Education Code § 17171 et seq.
- **California Universal Preschool Planning Grant Program**, Education Code § 8320
- **Community Schools, Education Code §§ 8901, 8902**
- **Consolidated Application for Federal and State Categorical Funds**, Education Code § 64000
- **Dual Enrollment Grant Opportunities**, Education Code § 41585
- **Education Protection Account Spending Requirements**, Cal. Constitution Art. 13 § 36
- **Facilities as Public Works (Prevailing Wage)**, Labor Code § 1720.8
- **Fiscal Crisis and Management Assistance Team (FCMAT)**, Education Code § 42127.8
- **Gift of Public Funds Prohibited**, Cal. Constitution Art. 16 § 6
- **Golden State Pathways Grant Program**, Education Code § 53021 et seq.
- **Golden State Teacher Grant Program**, Education Code § 69617
- **Kitchen Infrastructure Grant Program**, Section 138 of AB 130 (Ch. 44, Statutes of 2021), as amended by Section 49 of AB 185 (Ch. 571, Statutes of 2022)
- **K-12 Audit Guide**, Education Audit Appeals Panel, <http://eaap.ca.gov/wp-content/uploads/2021/07/2021-22-Audit-Guide.pdf>
- **LCAP Template and Dashboard Evaluation**, Education Code §§ 52064, 52064.5
- **LCFF: ADA Calculation**, Education Code § 42238.05
- **LCFF: Calculation of Base Entitlement for Transition to LCFF**, Education Code § 42238.03
- **LCFF: Economic Recovery Target Rate**, Education Code § 42238.025
- **LCFF: Funding Increases for Special Education, Childcare and Development, and Preschool Programs**, Education Code § 42238.15
- **LCFF: References**, Education Code § 42238.06
- **LCFF: SBE Regulations for Use of Concentration Grant Funds**, Education Code § 42238.07
- **LCFF: School District that has Converted to Charter District**, Education Code § 42238.055
- **LCFF: Sponsoring School District ADA Calculation**, Education Code §§ 42238.051 – 42238.053
- **School Funding Priority**, Cal. Constitution Art. 16 §§ 8, 8.5
- **Teacher Residency Grant Program**, Education Code § 44415.5 – 44415.7
- **Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards**, 2 C.F.R. Part 200

EMPLOYMENT

- **California Employers’ Pension Prefunding Trust Program**, Government Code § 21710
- **California Family Rights Act**, Government Code § 12945.2
- **CalPERS**, Government Code § 20000
- **CalSTRS**, Government Code § 22000 et seq.
- **Child Abuse and Neglect Reporting Act**, Penal Code § 11164 et seq.
- **Classified School Employee Summer Assistance Program**, Education Code § 45500
- **Collective Bargaining**, Government Code § 3540 et seq.
- **Equal Pay Requirements**, Labor Code § 1197.5
- **Employment Records Retention**, Government Code § 12946
- **Family Medical Leave Act**, 29 USCA § 2601 et seq.
- **Injury Prevention Program**, Labor Code § 6401.7 et seq.
- **Inspection and Copying of Personnel File**, Labor Code § 226
- **Lactation Accommodation**, Labor Code § 1030 et seq.
- **Makeup Work**, Labor Code § 513
- **Meal Period Requirements**, Labor Code § 512
- **Minimum Wage**, Labor Code § 1182.12
- **Online Training on Bullying and Cyberbullying Available to Employees**, Education Code § 32283.5
- **OSHA Violations**, Labor Code §§ 6317, 6317.8
- **Overtime**, definition of, Labor Code § 510
- **Paid Sick Leave**, Labor Code §§ 246, 248.6, 248.7
- **Pay Stub Requirements**, Labor Code § 226
- **Payment of Final Wages**, Labor Code §§ 201, 203
- **Pregnancy Disability Leave**, Government Code § 12945
- **Prohibition on Deterring or Discouraging Union Membership**, Government Code § 3550
- **Prohibition on Discrimination and Harassment**, Government Code § 12940 et seq.
- **Prohibition on Expunging Egregious Conduct from Employee Personnel File**, Education Code § 44939.5
- **Prohibition on Prevention or Control of Political Activities**, Labor Code § 1101
- **Prohibition on Requiring Access to Personal Social Media**, Labor Code § 980
- **Prospective Employee Salary Information**, Labor Code § 4323

- **Reimbursement of Business Expenses**, Labor Code § 2802
- **Reporting Allegations of Misconduct to CTC**, Education Code §§ 442425; 44030.5, Title 5 CCR § 80303
- **Secrecy and Settlement Agreements**, Code of Civil Procedure § 1001, Government Code § 12964.5
- **Semimonthly Payment of Wages**, Labor Code § 204 et seq.
- **Sexual Harassment Training**, Government Code § 12950 et seq.
- **Sick Leave**, Labor Code §§ 245.5, 246, 246.5
- **Teacher Credentialing**, Education Code § 44200 et seq.
- **Teacher Pay Periods**, Education Code §§ 45038 et seq.
- **Teacher Residency Grant Program**, Education Code §§ 44415.5, 44415.6, 44417.5
- **Wage Discrimination**, Labor Code § 1197.5
- **Whistleblower Protections**, Labor Code § 1102.5
- **Workplace Violence**, Code of Civil Procedure § 527.8

STUDENTS

- **Absences**, Education Code § 48205
- **Academic Assessment**, Education Code § 60600 et seq.
- **Achievement Tests and Assessments**, Education Code § 60641
- **Advertising Food or Beverages Prohibited**, Education Code § 49431.9
- **Albuterol Inhalers**, Education Code § 49414.7
- **Apprenticeship Programs; Career Fairs**, Labor Code § 3074.2
- **Asian Americans and Pacific Islanders**, Education Code § 51226.3
- **Behavioral Restraint or Seclusion**, Education Code § 49005 et seq.
- **California Indian Education Act**, Education Code §§ 33390, 33391
- **CDE Model Mental Health Referral Protocols**, Education Code 49428.1
- **Change of Pupil Name or Gender**, Education Code § 51226.3; Health and Safety Code § 103437
- **Changing Letter Grade to Pass or No Pass for High School Students Enrolled in 2020-21**, Education Code § 49066.5
- **Child Hunger Prevention and Fair Treatment Act of 2017**, Education Code § 49557.5
- **Class Size Reporting**, Education Code § 33317.5
- **Collection of LEA Preschool Data**, Education Code § 60910
- **College and Career Access Pathways Partnerships**, Education Code § 76004
- **Courses of Study**, Education Code § 51200 et seq.
- **Course of Study: World Language**, Education Code § 51225.37
- **Diplomas for Students Departing California Against Their Will**, Education Code § 51430(a)(3)
- **Dream Resource Center Grant Program**, Education Code §§ 54680 et seq.
- **Early College High Schools**, Education Code §§ 11302, 46146.5
- **English Language Proficiency Assessment**, Education Code § 313 et seq.
- **Exclusion of Directory and Personal Information from Minutes upon Request**, Education Code § 49073.2
- **Exemptions from Local Graduation Requirements for Foster, Homeless, Former Juvenile Court School, Military Family, Migratory, Newcomer Program, and Special Education Pupils**, Education Code §§ 51225, 51225.1, 51225.2, 51225.31
- **FERPA (Family Educational Rights and Privacy Act)**, 20 USC § 1232g; 34 CFR § 99
- **Food Recovery Program**, Education Code § 49580 et seq.
- **Foster Children Records**, Education Code §§ 49069.3, 49069.5
- **Foster Youth**, Welfare & Institutions Code § 16010
- **Gathering Information from Social Media**, Education Code § 49073.6
- **GEDs**, Education Code § 51420
- **Healthy Food, Healthy Student Act**, Education Code § 49430 et seq.
- **Honorary Diplomas**, Education Code § 51225.5
- **Human Trafficking Prevention Resources**, Education Code § 49381
- **IDEA Addendum**, Education Code § 52064.3
- **Inclusivity Guidance**, Education Code §§ 242, 60040.5
- **Kindergarten and Transitional Kindergarten Admissions and Teacher Credentialing**, Education Code § 48000
- **Lactation Accommodation**, Education Code § 222
- **LEA Instruction Collaboration Agreements**, Education Code § 48345
- **LGBTQ+ Task Force**, Education Code § 219
- **Local Public Library Partnership Program**, Education Code §§ 19340 et seq
- **McKinney-Vento Homeless Assistance Act**, 42 U.S.C. § 11301 et seq.
- **Medical Cannabis Administration**, Education Code § 49414.1
- **Meals Programs for Very High Poverty Schools**, Education Code § 49564
- **Model Curriculum**, Education Code §§ 33540.2, 33540.4

- **Native American Studies Model Curriculum by 2025**, Education Code § 51226.9
- **Online Training on Suicide Prevention**, Education Code § 216
- **Passenger Restraint System on Schoolbuses**, Vehicle Code § 27316
- **Pregnant and Parenting Students**, Education Code §§ 221.5, 222.5, 46015
- **Proper Use of Defibrillators**, Health & Safety Code § 1797.196
- **Public Health, Opioid Antagonist**,
Education Code § 49414.3 Business & Professions Code § 4119.8
- **Pupil Health, Anti-Seizure Medication**, Education Code § 49468 et seq.
- **Pupil Health, Epinephrine Auto-Injectors**,
Education Code § 49414; Business & Professions Code § 4119.2
- **Pupil Mental Health Guidelines for Use of Telehealth in Public Schools**,
Education Code § 49429
- **Pupil Residency for Military Students**, Education Code § 48204.6
- **Pupil Retention and Learning Recovery in 2021-22**, Education Code § 48071
- **Pupil Testing, California Assessment of Student Performance and Progress (CASPP)**
Education Code § 60640 et seq.; 5 Cal. Code Regs. § 850 et seq.
- **Restorative Justice Practices**, Education Code §§ 49055 et seq
- **Retroactive Grant of High School Diplomas**, Education Code § 51430
- **Safe and Supportive Schools Act**, Education Code § 218
- **Sexual Abuse and Sexual Assault Awareness and Prevention**, Education Code § 51900.6
- **Student Online Personal Information Protection Act**,
Business and Professions Code § 22584 et seq.
- **Title IX of the Education Amendments of 1972**, 20 U.S.C. §§ 1681-1688, 34 C.F.R. 106
- **Waiver of Graduation Requirements for High School Students Enrolled in 2020-21 and Not on Track to Graduate**,
Education Code § 51225
- **Work Permits**, Education Code §§ 49110, 49120

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IA Board Terms

Members

1

Previous term ended on 6/27/2023.

2



Julia Stoer
Teacher Representative

Term
8/1/2023 -
6/30/2026

Original Start Date
8/2/2023

3



Faraz Sharafi
Community Member

Term
1/3/2023 -
1/2/2026

Original Start Date
10/26/2021

4



Stephen Rosen
Board President
Board Treasurer
Community Member

Term
1/9/2022 -
1/8/2025

Original Start Date
1/9/2013

5



Danielle Strachman
Board Member
Co-Founder

Term
12/13/2022 -
12/12/2025

Original Start Date
12/13/2010

6



Jennifer Williams
Parent Representative

No term dates

Original Start Date
12/11/2023



AT-WILL EMPLOYMENT AGREEMENT BETWEEN INNOVATIONS

ACADEMY AND EXECUTIVE DIRECTOR

This At-Will Employment Agreement ("Agreement") is entered into by and between the above-named employee ("Employee") and the Governing Board ("Board") of Innovations Academy, doing business as Innovations Academy, a California public charter school approved by the San Diego Unified School District ("District"). The Board desires to hire employees who will assist Innovations Academy in implementing its purposes, policies, and procedures, and in achieving the goals and meeting the requirements of the Innovations Academy charter. The parties recognize that Innovations Academy is not governed by the provisions of the California Education Code, except as expressly set forth below.

WHEREAS, Innovations Academy and Employee wish to enter into an employment relationship under the conditions set forth herein, the parties mutually agree upon the terms and conditions set below:

A. Statutory Provisions Relating to Charter School Employment

1. Innovations Academy has been established and operates pursuant to the Charter Schools Act of 1992, Education Code section 47600, et seq. Innovations Academy has been duly approved by the District, according to the laws of the State of California.
2. Pursuant to Education Code section 47604, Innovations Academy has elected to be formed and to operate as a non-profit public benefit corporation pursuant to the Non-profit Public Benefit Corporation Law of California (Part 2, commencing with section 5110 et seq. of the Corporations Code). As such, Innovations Academy is considered a separate legal entity from the District, which granted the charter. The State Board shall not be liable for any debts and obligations for Innovations Academy, and the employee signing below expressly recognizes that he/she is being employed by Innovations Academy and not the District.
3. Pursuant to Education Code section 47610, Innovations Academy must comply with all the provisions set forth in its charter, but is otherwise exempt from the laws governing school districts except as specified in Education Code section 47610.
4. Innovations Academy shall be deemed the exclusive public-school employer of the employees at Innovations Academy for purposes of Government Code section 3540.1.

B. Employment During School Year and Conditions

1. Duties: The Employee shall work in the position of **Executive Director**. The Employee will perform such duties as described in the attached job description, which is incorporated by reference herein. These duties may be amended from time to time at the sole discretion of Innovations Academy. Innovations Academy may reasonably assign, and the Employee will abide by all school policies and procedures as adopted and amended from time to time. The Employee further agrees to abide by the provisions of the school charter.

2. Work Schedule: The minimum on-site obligations for this position shall generally be the following:
 - Monday-Friday (regular school days) – the Employee shall report to work thirty (30) minutes prior to the start of instruction. Tuesday-Thursday the Employee is expected to work a full eight (8) hour day in order to collaborate during after-school hours.

This offer of at-will employment is for an exempt position. While the Employee shall be available on-site during this time period, the duties of this exempt position may require work on weekends, as well as before and after the regular work year or hours of the workday. In fact, it is expected that the Employee will attend night performances, parent-teacher meetings (as needed), and any other school event outside of usual school hours. Workdays on which the Employee is expected to be on-site shall be consistent with the applicable calendar of workdays for this position. The current year schedule is attached hereto and incorporated by reference herein. Innovations Academy may revise the current year schedule as needed. The Employee will not render services in person or by electronic means, paid or otherwise, for any other person or entity during contracted work hours with Innovations Academy.

3. Compensation: The annual compensation for this position shall be **\$150,000 per year**, to be paid bimonthly (on the 15th and last day of the month) over the twenty-four (24) pay periods, in twelve (12) months, subject to all regular withholdings and deductions, which the Employee authorizes the School to make. The Employee's compensation may be prorated depending on whether the Employee remains employed, or in active work status, for the entire year. As an exempt employee, the Employee shall not be eligible for rest and meal breaks, or to earn overtime.
4. Employee Benefits: The Employee shall be entitled to participate in designated employee benefit programs and plans established by the school (subject to program and eligibility requirements) for the benefit of its employees, which from time to time may be modified by Innovations Academy in its sole discretion.

Employee is also entitled to the following specific benefits:
Sick Days as accumulated per the Employee Handbook

5. Evaluation: The Employee shall receive periodic performance reviews conducted by the board. The Employee will have ten (10) days from the date of his/her written performance evaluation in which to provide a written response. The Employee's performance may also be evaluated orally from time to time. The frequency of performance evaluations may vary. Failure to evaluate the Employee shall not prevent Innovations Academy from disciplining or dismissing the Employee at-will in accordance with this Agreement.

6. **Employee Rights:** Employment rights and benefits for employment at Innovations Academy shall only be as specified in this Agreement, Innovations Academy charter, the Charter Schools Act, and the school's current Employee Handbook, which may be amended and modified from time to time. Employment rights and benefits may be affected by other applicable agreements or directives or advisories from the California Department of Education or the State Board of Education. During the term of this Agreement, the Employee shall not acquire or accrue tenure, or any employment rights with Innovations Academy.
7. **Child Abuse and Neglect Reporting:** California Penal Code section 11166 requires any child care custodian who has knowledge of, or observes, a child in his or her professional capacity or within the scope of his or her employment whom he or she knows or reasonably suspects has been the victim of child abuse to report the known or suspected instance of child abuse to a child protective agency immediately, or as soon as practically possible, by telephone and to prepare and send a written report thereof within thirty-six (36) hours of receiving the information concerning the incident. By executing this Agreement, the Employee acknowledges he or she is a childcare custodian and is certifying that he or she has knowledge of California Penal Code section 11166 and will comply with its provisions.
8. **Fingerprint/TB Clearance:** Background check and fingerprint clearance for the Employee will be acquired through submitting the Employee's fingerprints to the California Department of Justice. The Employee may be required to assume the cost of all fees related to the background check and fingerprinting process. The Employee will also be required to submit evidence from a licensed physician and/or licensed entity that presents no risk factors for tuberculosis, or if risk factors were identified, the Employee was found to be free from active tuberculosis. The Employee's offer of at-will employment is contingent upon the successful completion of the background check/tuberculosis clearance. Both clearances must be in place prior to the first day of service.
9. **Conflict of Interest:** The Employee understands that, while employed at Innovations Academy, he/she will have access to confidential and proprietary information. The Employee therefore shall not maintain employment or contracts for employment, or engage in any consultant or independent contractor relationship, with any other agency or school that will in any way conflict with his/her employment with Innovations Academy.

EMPLOYMENT AT WILL

Employee's employment is at-will. Innovations Academy may terminate this Agreement and the Employee's employment at any time with or without cause, with or without advance notice, and at the school's sole and unreviewable discretion. Either party may immediately terminate this Agreement and the Employee's employment upon written notice to the other party.

The Employee also may be demoted or disciplined, and the terms of his/her employment may be altered at any time, with or without cause, at the discretion of the school. No one other than the Board has the authority to alter this arrangement, to enter into an agreement for employment for a specified period of time, or to make any agreement contrary to the terms of this Agreement, and any such agreement must be in writing and must be signed by the Board and by the affected employee and must specifically state the intention to alter this "at-will" relationship.

In the event of charter revocation or non-renewal, all contractual obligations under this Agreement cease immediately upon the effective date of revocation or non-renewal.

C. General Provisions

1. **Severability:** If any provision of this agreement is ruled illegal or unenforceable by a court of competent jurisdiction, the remainder of the agreement not affected by the ruling shall remain valid and in effect.
2. **Waiver of Breach:** The waiver by either party, or the failure of either party to claim a breach of any provision of this Agreement, will not operate or be construed as a waiver of any subsequent breach.

3. Governing Law: This Agreement will be governed by, construed, and enforced in accordance with the laws of the State of California.

4. The rights and obligations of the respective parties under the Agreement will inure to the benefit of and will be binding upon the heirs, legal representatives, successors and assigns of the parties hereto; provided, however, that this Agreement will not be assignable by either party without prior written consent of the other party.

D. Acceptance of Employment

By signing below, the Employee declares as follows:

1. I have read this Agreement and accept employment with Innovations Academy on the terms specified herein.
2. All information I have provided to Innovations Academy related to my employment is true and accurate.
3. A copy of the job description is attached hereto.
4. This is the entire agreement between Innovations Academy and me regarding the terms and conditions of my employment. This is a final and complete agreement and there are no other agreements, oral or written, expressed or implied, concerning the subject matter of this Agreement.

Employee Name (print)

Date

Employee Signature

Employee Address:

Employee Telephone: _____

Innovations Academy Board Approval:

Board Chair

Date

This Employment Agreement is subject to ratification and approval by the Executive Director of Innovations Academy.



Job Description

Executive Director

The Role of the Executive Director

The Executive Director is the leader of the Charter School, providing the instructional, operational, financial and administrative direction necessary to ensure the success of the Charter School. This necessitates developing and maintaining close working relationships with all school-wide constituencies including parents, guardians, families, students, faculty, staff, other administrators, advisors, trustees, governmental entities, community members and strategic partners. The Executive Director works with and oversees all teachers and staff to ensure that the educational program is implemented in a manner that maximizes student-learning experiences. In fulfilling these goals, the Executive Director reports directly to and works in conjunction with the Board of Directors. The Board of Directors is responsible for determining and overseeing the Executive Director's precise job description and duties. As appropriate and necessary, certain duties may be delegated to key staff members.

Essential Duties and Responsibilities

- Ensure Innovations Academy enacts its mission.
- Communicate and report to the Board of Directors
- Lead and provide direction for the School Leadership Team
- Ensure an effective system is established and followed to provide feedback to and evaluate teachers and staff
- Oversee school finances (with back office, as appropriate) to ensure financial stability and sustainability
- Communicate with parents, recruit new families and students, and assure families of academic growth.
- Ensure an effective system is established and followed to develop high-quality professional development/learning
- Identify the staffing needs of Innovations Academy and other staff development as needed.
- Interview and make employee hiring, promotion, discipline, and/or dismissal decision, and report to the Board
- Ensure compliance with all applicable state and federal laws and help secure local grants
- Empower office staff to take appropriate steps to ensure full and regular student attendance in accordance with school policies
- Complete and submit required documents as requested or required by the charter and/or Board of Directors and/or the District
- Ensure the establishment and maintenance of a system to handle organizational tasks such as student records, teacher records, teacher credentialing information, contemporaneous attendance logs, purchasing, budgets, and timetables.
- Ensure effective safety and security protocols are established and followed.
- Promote Innovations Academy in the community and interact effectively with media
- Attend District Administrative meetings as requested by the District and stay in direct contact with the District regarding changes, progress, etc.
- Maintain up-to-date financial records
- Provide all necessary financial reports as required for proper attendance reporting
- Develop the school annual performance report and the SARC.
- Ensure the timely completion, reporting, and submission of annual independent fiscal audit
- Ensure an effective discipline system is established and followed which incorporates Positive Discipline and Restorative Practices when school staff respond to student behaviors; if necessary, participate in the suspension and expulsion process
- Participate in IEP meetings as necessary.

CSMC Consulting Services Proposal



Innovations Academy

5454 Ruffin Road

San Diego, CA 92123

October 11, 2024

CSMC
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Temecula, CA 92590
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CSMC Proposal: Price Sheet

Innovations Academy

5454 Ruffin Road
 San Diego, CA 92123

Details - Initial Term: November 01, 2024 - July 31, 2025

Services Selected	Setup Fee	Service Cost	Total
Consulting Services	\$0.00	\$25,000.00	\$25,000.00
		Total:	\$25,000.00

Summary: Entirety of Terms Set Forth

Terms	Start Date	End Date	Total
Initial Term	November 01, 2024	July 31, 2025	\$25,000.00

Scope of Services: Consulting

The proposed consulting services provide full service support for the completion of the charter school's renewal petition, to include the following:

Researching and organizing school data

Crafting the data and renewal story

Site visit

In-person and/or virtual meetings, as necessary for collaboration

All drafting, revising, and editing of the renewal petition

Support with advocacy and planning for the public hearing, as needed

Comprehensive School Safety Plan

**2024-2025
School Year**

School: Innovations Academy
CDS Code: 37683380118083
District: Innovations Academy
Address: 5454 Ruffin Rd.
San Diego, CA 92123

Date of Adoption:

Date of Update:

Date of Review:

- with Staff
- with Law Enforcement
- with Fire Authority

Approved by:

Name	Title	Signature	Date

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Comprehensive School Safety Plan Purpose

Effective January 1, 2019, Assembly Bill 1747 (Rodriguez), School Safety Plans, became law. This bill requires that during the writing and development of the comprehensive school safety plan (CSSP), the school site council or safety committee consult with a fire department and other first responder entities in addition to currently required entities. It requires the CSSP and any updates made to the plan to be shared with the law enforcement agency, the fire department, and the other first responder entities.

The California Education Code (sections 32280-32288) outlines the requirements of all schools operating any kindergarten and any grades 1 to 12, inclusive, to write and develop a school safety plan relevant to the needs and resources of that particular school.

In 2004, the Legislature and Governor recast and renumbered the Comprehensive School Safety Plan provisions in SB 719 and AB 115. It is the intent of the Legislature in enacting the provisions to support California public schools as they develop their mandated comprehensive safety plans that are the result of a systematic planning process, that include strategies aimed at the prevention of, and education about, potential incidents involving crime and violence on school campuses.

The historical requirement of the Comprehensive School Safety Plan was presented in Senate Bill 187, which was approved by the Governor and chaptered in 1997. This legislation contained a sunset clause that stated that this legislation would remain in effect only until January 1, 2000. Senate Bill 334 was approved and chaptered in 1999 and perpetuated this legislation under the requirement of the initial legislation.

Comprehensive School Safety Plans are required under SB 719 & AB 115 and contains the following elements:

Assessment of school crime committed on school campuses and at school-related functions

- Child abuse reporting procedures
- Disaster procedures
- Suspension and expulsion policies
- Procedures to notify teachers of dangerous pupils
- Discrimination and harassment policies
- School wide dress code policies
- Procedures for safe ingress and egress
- Policies enacted to maintain a safe and orderly environment
- Rules and procedures on school discipline
- Hate crime reporting procedures

The Comprehensive School Safety Plan will be reviewed and updated by March 1st every year. In July of every year, the school will report on the status of its school safety plan including a description of its key elements in the annual school accountability report card.

A copy of the Comprehensive School Safety Plan is available for review at the front office, 5454 Ruffin Rd., San Diego, Ca. 92123.

Safety Plan Vision

Innovations Academy is committed to ensuring that all students enrolled in our school, and all employees, attend a school campus that is safe and secure. In addition, it is our goal for safety to extend to school sponsored trips and activities and on the school bus. Innovations Academy believes that a beginning step towards a safer school is the development of a comprehensive plan for school safety. Innovations Academy intends that parents, students, teachers, administrators, counselors, classified personnel and communities agencies develop a safe school plan. The school site committee will review these safe school plans on an annual basis and proposed changes will be submitted to the board for approval.

Components of the Comprehensive School Safety Plan (EC 32281)

Innovations Academy Safety Committee

The Innovations Academy Safety Committee will meet annually to create, review and practice school wide safety procedures. The School Site Council will also review and update the Comprehensive Safety Plan. All staff are trained annually on procedures.

Assessment of School Safety

Innovations Academy has worked tirelessly to support and monitor all students and to ensure that all students, staff, and community stakeholders are safe when on campus. Through the use of Positive Discipline interventions and supports, we instruct students on what expected behaviors should look and feel like. We emphasize logical consequences, no rewards and no punishments. We utilize Positive Discipline practices to support students in recognizing and managing their own emotions and the build healthy empathy for others.

Our safety plan is designed to address a variety of needs, both behavioral and social-emotional in a healthy, positive way.

Strategies and Programs to Provide and Maintain a High Level of Safety (EC 32281(a)1, items A-J)

Innovations Academy follows all California Education Code regarding legal protocol and requirements to maintain a safe and orderly school environment. We use California Ed Code to guide our decisions regarding class and school suspensions. We use Positive Discipline philosophy to guide our teaching and approaches when teaching students to recognize and control their own emotions. We use restorative practices to help students build empathy for others as well as encouraging students to take accountability for their actions in a meaningful way. We focus on practices that encourage intrinsic motivation so that student actions and behaviors are tailored towards a more collaborative community.

(A) Child Abuse Reporting Procedures (EC 35294.2 [a] [2]; PC 11166)

All staff members are mandated reporters and are required, by law, to report all known or suspected cases of child abuse or neglect. It is not the job of the mandated reporter to determine whether the allegations are valid. If child abuse or neglect is reasonably suspected or if a pupil shares information with a mandated reporter leading him/her to believe abuse or neglect has taken place, the report must be made. No supervisor or administrator can impede or inhibit a report or subject the reporting person to any sanction.

To make a report, an employee must contact Child Protective Services. This legal obligation is not satisfied by making a report of the incident to a supervisor or to the school.

First, the mandated reporter will complete form SS8572 which can be found here (http://ag.ca.gov/childabuse/pdf/ss_8572.pdf) The report should be made before the close of the day over the telephone and must be followed up in writing. If a report cannot be made immediately over the telephone, then an initial report may be made via e-mail or fax. A report should also be made at the same time with the school director and/or school counselor.

Per Assembly Bill 1432 (D-Gatto), all employees of Innovations Academy will be trained on what they need to know in order to identify and report suspected cases of child abuse and neglect. For this purpose, all employees are required to take the online California Child Abuse Mandated Reporter Training (<http://educators.mandatedreporterca.com/>). Proof of completion of the course must be given to office staff prior to the commencement of the school year or if an employee starts midyear by the end of the first week of employment.

Rights to Confidentiality and Immunity

Mandated reporters are required to give their names when making a report. However, the reporter's identity is kept confidential. Reports of suspected child abuse are also confidential. Mandated reporters have immunity from state criminal or civil liability for reporting as required. This is true even if the mandated reporter acquired the knowledge, or suspicion of the abuse or neglect, outside his/her professional capacity or scope of employment.

Consequences of Failing to Report

Staff should be aware that a person who fails to make a required report is guilty of a misdemeanor punishable by up to six months in jail and/or up to a \$1,000 fine (California Penal Code Section 11166[c]).

After the Report is Made

Child Protective Services is required to investigate all reports. Cases may also be investigated by Child Welfare Services when allegations involve abuse or neglect within families.

(B) Disaster Procedures (EC 35295-35297; GC 8607 and 3100)

Disaster Plan (See Appendix C-F)

Public Agency Use of School Buildings for Emergency Shelters

During an emergency, if Innovations Academy is selected as an emergency shelter, all staff and parents/caregivers/guardians will be notified and informed as to procedures.

Disaster Service Workers

Section 3100 of the California Government Code states that public employees are disaster service workers who are subject to the disaster service activities assigned to them by their superiors or by law. The term public employees includes all personnel employed by State of California agencies, California county and city agencies, and public districts. Innovations Academy employees are designated as disaster service workers. Section 3100 of the California Government Code applies to public school employees for cases in which:

A local emergency has been proclaimed.

A State of Emergency has been proclaimed.

A Federal disaster declaration has been made.

Emergency Disaster Kit This site maintains 3 kits. The kit(s) are located: Front Office, room 200.

The Emergency Disaster Kit stores necessary resources for a site incident command. This kit will be brought to the Command Post and will be used by the Commander. This kit should not be confused with the First Aid Kit or the Student Release Kit. These kits can both be found with the Emergency Disaster Kit. School personnel should use the items contained within the kit to manage their incident command. The following equipment and supplies are stored inside the Emergency Disaster Kit:

- Handheld Air Horns – recommend a minimum of five
- Bull Horn – recommend a minimum of one
- Batteries – recommend a minimum of two sets for bull horn, flashlights, emergency radios and walkie talkies
- Flashlights – recommend one per Site Incident Command Team member (15)
- Emergency radio (for Site Commander)
- Walkie Talkies – recommend a minimum of six (Site Incident Commander & Leaders)
- Duct Tape – recommend a minimum of two rolls used for marking blank vests.
- Rosters - recommend a minimum of one set per room sorted by alphabet
- Pencils & Pens - recommend one each per Site Incident Command Team member (34)
- Chalk - recommend twenty-five sticks, red in color
- Medical Team Supplies –
- Roster
- First aid kit
- Water bottles
- Blankets
- Clipboards
- Vests for Key Personnel – recommend a total of 15 for Site Incident Command Team members
- Student Release Supplies
- Student Roster
- Clipboard

The Emergency Disaster Kit and its contents are the responsibility of the Site Incident Commander. The Site Incident Commander will conduct annual inspections of the kits in October of each year and maintain the responsibility to inspect and replace non-operating equipment and supplies each year.

Emergency Response Boxes This site maintains 1 Emergency Response Box for the Site Incident Command Team.

The Emergency Response Box is located in the Main Office near: Director's Office.

The Emergency Response Box is a file folder type box. The box is clearly labeled and contains vital information needed by the Site Incident Command Team. The following information is stored inside the box:

- Current copy of the Site Emergency Response Plan which should include site evacuation procedures, including staging locations. Also included should be an aerial photo including all new structures, electric, gas, water cable, telephone, intrusion and fire alarm shutoffs, classroom numbers, gate openings for vehicles/pedestrians and all fire hydrants that have been added to accommodate these new structures.
- Current map of site or school layout. Map must show all buildings, classroom numbers, and evacuation routes. · Most current blueprints (architectural drawings).
- Current roster of students and staff assigned to the site, as well as issues pertaining to special needs students. These rosters will be in alphabetical order for staff and students. Student roster must be in alphabetical order, divided by grade level and have emergency contact/release information.
- A list of the site's staff skills including language translation, specialized training, and emergency equipment carried in vehicles.
- If available, current student photos on CD-ROM or most recent yearbook.
- Telephone numbers listed in numerical order for each classroom/building.

Maintenance of the Emergency Response Box and its contents is the responsibility of the Site Incident Commander. The responsibility to inspect and replace information belongs to the Site Commander.

Return to Facility The Site Incident Commander, in consultation with the Public Safety Incident Commander if necessary, will determine when individuals can return to the facility. In the event that staff or students must be released early, the Site Incident Commander must request approval from the Office of the Director. School Police Services should be advised of this information. **Site Shelter-In-Place Procedure** Shelter-In-Place generally occurs when evacuating the site is more dangerous than taking shelter inside a building. This generally occurs during natural disasters, severe weather conditions, or health hazards. The following procedure applies to this site. Additional information pertaining to Shelter-in-Place is available in Innovations Academy Emergency Procedures (confidential).

Notification

The Site Incident Commander is responsible to notify the Site Incident Command Team when a Shelter-In-Place is necessary. School Police Services, in coordination with the Site Incident Commander is responsible for activating the Shelter-In-Place notification procedures for site-level personnel. If the primary emergency notification system fails to activate, the secondary notification method will be handheld air horns found in the Emergency Disaster Kit.

Activation & Deactivation Quickly direct students and staff inside to the nearest room; do a verbal and visual sweep as you get everyone inside. Shut all doors and windows leading into the room, including interior doors. Doors may be opened for late arrivals if the exterior environment is safe. Take student attendance and report missing or extra students or adults to the office by radio, telephone or email. For environmental emergencies, immediately shut off the air conditioning/heating system, try to seal air vents and gaps under doors and around windows. Monitor your local radio, T.V. or e-mail for updates. Remain in Shelter-in-Place until the "All Clear" notification is given.

Return to Facility The Site Incident Commander, in consultation with the Public Safety Incident Commander if necessary, will determine when individuals can return to the facility. In the event that staff or students must be released early, the Site Incident Commander must request approval from the Director. School Police Services should be advised of this information.

Site Lockdown Procedure A lockdown is the act of confining students and personnel in a secured location until an emergency or threat (e.g., police activity) is over. You may be required to lockdown your room or facility when a dangerous person or situation is present on or near the site. Additional information pertaining to Lockdown is available in Innovations Academy Emergency Procedures (confidential).

Notification

The Site Incident Commander is responsible to notify the Site Incident Command Team when a lockdown is necessary. School Police Services, in coordination with the Site Incident Commander is responsible for activating the Lockdown notification procedures for site-level personnel.

If the primary emergency notification system fails to activate, the secondary notification method will be handheld air horns found in the Emergency Disaster Kit.

Activation & Deactivation Quickly gather students and personnel to the nearest room; do a verbal and visual sweep as you gather everyone inside. Lock all doors and windows, including any interior doors. Close all window coverings to prevent anyone from seeing inside your room. Keep away from doors and windows, be quiet. Take attendance and quietly radio, telephone, or e-mail information pertaining to missing or extra students or adults to the office. If safe to do so, monitor email for updates. If you hear gunfire or if someone tries to enter your room, have everyone "Duck, Cover, and Hold" under desks. Do not open doors or windows. Remain in lockdown until the "All Clear" notification is given.

Return to Facility The Site Incident Commander, in consultation with the Public Safety Incident Commander if necessary, will determine when individuals can return to the facility. In the event that staff or students must be released early, the Site Incident Commander must request approval from the Office of the Superintendent. School Police Services should be advised of this information.

Adaptations for Students with Disabilities

In emergencies, persons with disabilities may need special assistance in evacuating to the designated location. Each Site Incident Commander is responsible for pre-identification of persons with disabilities who may need assistance and assigning staff to assist them. Persons with disabilities or other staff who may need special assistance in an evacuation situation are responsible for ensuring that their Department Head is aware of their needs for assistance. Because of the volume of foot traffic that can be expected through stairways and corridors in a building during an evacuation, there must be an area of rescue assistance established aside from the main flow of foot traffic. Such an area must be clearly marked so disabled individuals know where to go for refuge in a critical time. Proper signage for this area is "Area of Rescue Assistance." Evacuation maps will articulate this information.

Public Agency Use of School Buildings for Emergency Shelters

During an emergency, if Innovations Academy is selected as an emergency shelter, all staff and parents/caregivers/guardians will be notified and informed as to procedures.

(C) School Suspension, Expulsion and Mandatory Expulsion Guidelines

Suspension/Expulsion Procedures

At Innovations Academy we pride ourselves in our Character Development program that includes children in the conflict resolution process. Most incidents at school will be handled inside the classroom through peer to peer conflict resolution, teacher to student discussion and problem solving or through the class council conflict resolution procedure. However, when a situation reaches the level of needing intervention from the Director, an evaluation is made as to if a suspension or expulsion is recommended. This section is designed to inform all parents of suspension/expulsion procedures and due process.

Innovations Academy staff shall enforce disciplinary rules and procedures fairly and consistently among all students. Discipline includes but is not limited to advising and counseling students, conferring with parents/guardians, detention during and after school hours, use of alternative educational environments, suspension and expulsion.

Corporal punishment shall not be used as a disciplinary measure against any student. Corporal punishment includes the willful infliction of or willfully causing the infliction of physical pain on a student. For purposes of the policy, corporal punishment does not include an employee's use of force that is reasonable and necessary to protect the employee, students, staff or other persons or to prevent damage to school property. Suspended or expelled students shall be excluded from all school and school-related activities unless otherwise agreed during the period of suspension or expulsion.

A student identified as an individual with disabilities or for whom Innovations Academy has a basis of knowledge of a suspected disability pursuant to the Individuals with Disabilities in Education Act ("IDEA") or who is qualified for services under Section 504 of the Rehabilitation Act of 1973 ("Section 504") is subject to the same grounds for suspension and expulsion and is accorded the same due process procedures applicable to regular education students except when federal and state law mandates additional or different procedures.

Innovations Academy will follow Section 504, the IDEA, and all applicable federal and state laws including but not limited to the California Education Code, when imposing any form of discipline on a student identified as an individual with disabilities or for whom Innovations Academy has a basis of knowledge of a suspected disability or who is otherwise qualified for such services or protections in according due process to such students. Within ten school days, the school will assemble an IEP team to make a manifestation determination as to whether the disciplinary behavior was the result of the student's disability. Should the student remain on suspension for an extended period, the school will work with the district to provide an interim alternative educational setting. Innovations Academy shall notify the District of the suspension of any student identified under the IDEIA (or for whom there may be a basis of knowledge of the same) or as a student with a disability under Section 504 and would grant the District approval rights prior to the expulsion of any such student as well.

1. Grounds for Suspension and Expulsion of Students

A student may be suspended or expelled for prohibited misconduct if the act is related to school activity or school attendance occurring at Innovations Academy or at any other school or an Innovations Academy sponsored event at any time including but not limited to: a) while on school grounds; b) while going to or coming from school; c) during the lunch period, whether on or off the school campus; d) during, going to, or coming from a school- sponsored activity.

2. Enumerated Offenses

Students may be suspended or expelled for any of the following acts when it is determined the pupil:

a. Caused, attempted to cause, or threatened to cause physical injury to another person or willfully used force of violence upon the person of another, except self-defense.

b. Possessed, sold, or otherwise furnished any firearm, knife, explosive, or other dangerous object unless, in the case of possession of any object of this type, the students had obtained written permission to possess the item from a certificated school employee, with the Director or designee's concurrence.

c. Unlawfully possessed, used, sold or otherwise furnished, or was under the influence of any controlled substance, as defined in Health and Safety Code 11053-11058, alcoholic beverage, or intoxicant of any kind.

d. Unlawfully offered, arranged, or negotiated to sell any controlled substance as defined in Health and Safety Code 11053-11058, alcoholic beverage or intoxicant of any kind, and then sold, delivered or otherwise furnished to any person another liquid substance or material and represented same as controlled substance, alcoholic beverage or intoxicant.

e. Committed or attempted to commit robbery or extortion.

f. Caused or attempted to cause damage to school property or private property.

g. Stole or attempted to steal school property or private property.

h. Possessed or used tobacco or any products containing tobacco or nicotine products, including but not limited to cigars, cigarettes, miniature cigars, clove cigarettes, smokeless tobacco, snuff, chew packets and betel.

i. Committed an obscene act or engaged in habitual profanity or vulgarity.

j. Unlawfully possessed or unlawfully offered, arranged, or negotiated to sell any drug paraphernalia, as defined in Health and Safety Code 11014.5.

k. Disrupted school activities or otherwise willfully defied the valid authority of supervisors, teachers, administrators, other school officials, or other school personnel engaged in the performance of their duties.

l. Knowingly received stolen school property or private property.

- m. Possessed an imitation firearm, i.e.: a replica of a firearm that is so substantially similar in physical properties to an existing firearm as to lead a reasonable person to conclude that the replica is a firearm.
- n. Committed or attempted to commit a sexual assault as defined in Penal Code 261, 266c, 286, 288, 288a or 289, or committed a sexual battery as defined in Penal Code 243.4.
- o. Harassed, threatened, or intimidated a student who is a complaining witness or witness in a school disciplinary proceeding for the purpose of preventing that student from being a witness and/or retaliating against that student for being a witness.
- p. Unlawfully offered, arranged to sell, negotiated to sell, or sold the prescription drug Soma.
- q. Engaged in or attempted to engage in hazing of another.
- r. Aiding or abetting as defined in Section 31 of the Penal Code, the infliction or attempted infliction of physical injury to another person.
- s. Made terrorist threats against school officials and/or school property.
- t. Committed sexual harassment.
- u. Caused, attempted to cause, threatened to cause, or participated in an act of hate violence.
- v. Intentionally harassed, threatened or intimidated a student or group of students to the extent of having the actual and reasonably expected effect of materially disrupting class work, creating substantial disorder and invading student rights by creating an intimidating or hostile educational environment. Threatened or attempted to cause harm to a teacher or other staff member.

Alternatives to suspension or expulsion will first be attempted with students who are truant, tardy, or otherwise absent from assigned school activities.

Whether a student is given suspension or expulsion will be determined by prior record, intent and severity and determined by the Director. A recommendation for expulsion will be taken to the Board for approval prior to the expulsion being levied.

3. Suspension shall be initiated according to the following procedures:

a. Who May Suspend

Only the Director (Principal) or the Director's designee may suspend a student.

b. Conference

Suspension shall be preceded, if possible, by a conference conducted by the Director or the Director's designee with the student and his or her parent and, whenever practical, the teacher, supervisor or school employee who referred the student to the Director. The conference may be omitted if the Director or designee determines that an emergency situation exists.

An "emergency situation" involves a clear and present danger to the lives, safety or health of students or school personnel. If a student is suspended without this conference, both the parent/guardian and student shall be notified of the student's right to return to school for the purpose of a conference.

At the conference, the pupil shall be informed of the reason for the disciplinary action and the evidence against him or her and shall be given the opportunity to present his or her version and evidence in his or her defense.

This conference shall be held within two school days, unless the pupil waives this right or is physically unable to attend for any reason including, but not limited to, incarceration or hospitalization.

No penalties may be imposed on a pupil for failure of the pupil's parent or guardian to attend a conference with school officials. Reinstatement of the suspended pupil shall not be contingent upon attendance by the pupil's parent or guardian at the conference.

c. Notice to Parents/Guardians

At the time of the suspension, an administrator or designee shall make a reasonable effort to contact the parent/guardian by telephone or in person. Whenever a student is suspended, the parent/guardian shall be notified in writing of the suspension and the date of return following suspension. This notice shall state the specific offense committed by the student. In addition, the notice may also state the date and time when the student may return to school. If school officials wish to ask the parent/guardian to confer regarding matters pertinent to the suspension, the notice may request that the parent/guardian respond to such requests without delay.

d. Suspension Time Limits/Recommendation for Placement/Expulsion

Suspensions, when not including a recommendation for expulsion, shall not exceed five (5) consecutive school days per suspension.

Upon a recommendation of placement/expulsion by the Director or Director's designee, the pupil and the pupil's guardian or representative will be invited to a conference to determine if the suspension for the pupil should be extended pending an expulsion hearing. This determination will be made by the Director or designee upon either of the following determinations: 1) the pupil's presence will be disruptive to the education process; or 2) the pupil poses a threat or danger to others. Upon either determination, the pupil's suspension will be extended pending the results of an expulsion hearing.

4. Authority to Expel

A student may be expelled either by the Innovations Academy Board following a hearing before it or by the Board upon the recommendation of an Administrative Panel to be assigned by the Board as needed. The Administrative Panel should consist of at least three members who are certificated and neither a teacher of the pupil or a Board member of the School's governing board. The Administrative Panel may recommend expulsion of any student found to have committed an expellable offense.

5. Expulsion Procedures

Only the Director or the Director's designee may recommend expulsion of a student or refer a student for an expulsion hearing. Students recommended for expulsion are entitled to a hearing to determine whether the student should be expelled. Unless postponed for good cause, the hearing shall be held within thirty school days after the Director or designee determines that the Pupil has committed an expellable offense.

In the event an administrative panel hears the case, it will make a recommendation to the Board for a final decision whether to expel. The hearing shall be held in closed session unless the pupil makes a written request for a public hearing three days prior to the hearing.

Written notice of the hearing shall be forwarded to the student and the student's parent/guardian at least ten calendar days before the date of the hearing. Upon mailing the notice, it shall be deemed served upon the pupil. The notice shall include:

- a. The date and place of the expulsion hearing;
- b. A statement of the specific facts, charges and offenses upon which the proposed expulsion is based;
- c. A copy of the School's disciplinary rules which relate to the alleged violation;
- d. Notification of the student's or parent/guardian's obligation to provide information about the student's status at the school to any other school district or school to which the student seeks enrollment;
- e. The opportunity for the student or the student's parent/guardian to appear in person or to employ and be represented by counsel or a non- attorney advisor;
- f. The right to inspect and obtain copies of all documents to be used at the hearing;
- g. The opportunity to confront and question all witnesses who testify at the hearing;

h. The opportunity to question all evidence presented and to present oral and documentary evidence on the student's behalf including witnesses.

6. Special Procedures for Expulsion Hearings Involving Sexual Assault or Battery Offenses

Innovations Academy may, upon a finding of good cause, determine that the disclosure of either the identity of the witness or the testimony of that witness at the hearing, or both, would subject the witness to an unreasonable risk of psychological or physical harm. Upon this determination, the testimony of the witness may be presented at the hearing in the form of sworn declarations which shall be examined only by the school or the hearing officer. Copies of these sworn declarations, edited to delete the name and identity of the witness, shall be made available to the pupil.

a. The complaining witness in any sexual assault or battery case must be provided with a copy of the applicable disciplinary rules and advised of his/her right to (a) receive five days notice of his/her scheduled testimony, (b) have up to two (2) adult support persons of his/her choosing present in the hearing at the time he/she testifies, which may include a parent, guardian, or legal counsel, and (c) elect to have the hearing closed while testifying.

b. Innovations Academy must also provide the victim a room separate from the hearing room for the complaining witness' use prior to and during breaks in testimony.

c. At the discretion of the person or panel conducting the hearing, the complaining witness shall be allowed periods of relief from examination and cross-examination during which he or she may leave the hearing room.

d. The person conducting the expulsion hearing may also arrange the seating within the hearing room to facilitate a less intimidating environment for the complaining witness.

e. The person conducting the expulsion hearing may also limit time for taking the testimony of the complaining witness to the hours he/she is normally in school, if there is no good cause to take the testimony during other hours.

f. Prior to a complaining witness testifying, the support persons must be admonished that the hearing is confidential. Nothing in the law precludes the person presiding over the hearing from removing a support person whom the presiding person finds is disrupting the hearing. The person conducting the hearing may permit any one of the support persons for the complaining witness to accompany him or her to the witness stand.

g. If one or both of the support persons is also a witness, Innovations Academy must present evidence that the witness' presence is both desired by the witness and will be helpful to the School. The person presiding over the hearing shall permit the witness to stay unless it is established that there is a substantial risk that the testimony of the complaining witness would be influenced by the support person, in which case the presiding official shall admonish the support person or persons not to prompt, sway, or influence the witness in any way. Nothing shall preclude the presiding officer from exercising his or her discretion to remove a person from the hearing whom he or she believes is prompting, swaying, or influencing the witness.

h. The testimony of the support person shall be presented before the testimony of the complaining witness and the complaining witness shall be excluded from the courtroom during that testimony.

i. Especially for charges involving sexual assault or battery, if the hearing is to be conducted in the public at the request of the pupil being expelled, the complaining witness shall have the right to have his/her testimony heard in a closed session when testifying at a public meeting would threaten serious psychological harm to the complaining witness and there are no alternative

procedures to avoid the threatened harm. The alternative procedures may include videotaped depositions or contemporaneous examination in another place communicated to the hearing room by means of closed-circuit television.

j. Evidence of specific instances of a complaining witness' prior sexual conduct is presumed inadmissible and shall not be heard absent a determination by the person conducting the hearing that extraordinary circumstances exist requiring the evidence be heard. Before such a determination regarding extraordinary circumstance can be made, the witness shall be provided notice and an opportunity to present opposition to the introduction of the evidence. In the hearing on the admissibility of the evidence, the complaining witness shall be entitled to be represented by a parent, legal counsel, or other support person. Reputation or opinion evidence regarding the sexual behavior of the complaining witness is not admissible for any purpose.

7. Record of Hearing

A record of the hearing shall be made and may be maintained by any means, including electronic recording, as long as a reasonably accurate and complete written transcription of the proceedings can be made.

8. Presentation of Evidence

While technical rules of evidence do not apply to expulsion hearings, evidence may be admitted and used as proof only if it is the kind of evidence on which reasonable persons can rely in the conduct of serious affairs. A recommendation by the Administrative Panel to expel must be supported by substantial evidence that the student committed an expellable offense.

Findings of fact shall be based solely on the evidence at the hearing. While hearsay evidence is admissible, no decision to expel shall be based solely on hearsay and sworn declarations may be admitted as testimony from witnesses of whom the Board, Panel or designee determines that disclosure of their identity or testimony at the hearing may subject them to an unreasonable risk of physical or psychological harm.

If, due to a written request by the expelled pupil, the hearing is held at a public meeting, and the charge is committing or attempting to commit a sexual assault or committing a sexual battery as defined in Education Code Section 48900, a complaining witness shall have the right to have his or her testimony heard in a session closed to the public.

The decision of the Administrative Panel shall be made based on findings of facts in the form of written findings of fact and a written recommendation to the Board who will make a final determination regarding the expulsion. The final decision by the Board shall be based on the written findings of facts and shall be made within ten (10) school days following the conclusion of the hearing. The Decision of the Board is final.

If the expulsion hearing panel decides not to recommend expulsion, the pupil shall immediately be returned to his/her educational program.

Independent study is an alternative to classroom instruction. Students who are excluded from classroom instruction in a school district—who have been suspended or expelled—are thereby excluded from independent study as well. No ADA credit may be claimed for either classroom attendance or independent study by suspended/expelled students during the duration of their suspensions/expulsions. Students whose expulsions are being held in abeyance pursuant to Education Code Section 48917 and who have been referred to specified settings in lieu of expulsion, pursuant to that section may generate ADA credit through independent study only if they are also given at least one classroom instruction option.

9. Written Notice to Expel

The Director or designee following a decision of the Innovations Academy Charter School Board to expel shall send written notice of the decision to expel, including the Board's adopted findings of fact, to the student or parent/guardian. This notice shall also include the following:

- a. Notice of the specific offense committed by the student
- b. Notice of the student's or parent/guardian's obligation to inform any new district in which the student seeks to enroll of the student's status with the school.

The Director or designee shall send a copy of the written notice of the decision to expel to the District. This notice shall include the following:

- a) The student's name
- b) The specific expellable offense committed by the student

Additionally, in accordance with Education Code Section 47605(d)(3), upon expulsion of any student, Innovations Academy shall notify the superintendent of the school district of the pupil's last known address within 30 days, and shall, upon request, provide that school district with a copy of

the cumulative record of the pupil, including a transcript of grades or report card and health information.

10. Disciplinary Records

Innovations Academy shall maintain records of all student suspensions and expulsions at the school. Such records shall be made available to the District upon request.

11. No Right to Appeal

The pupil shall have no right of appeal from expulsion from Innovations Academy as the Charter School Board's decision to expel shall be final.

12. Expelled Pupils/Alternative Education

Pupils who are expelled shall be responsible for seeking alternative education programs including, but not limited to, programs within the County or their school district of residence.

13. Rehabilitation Plans

Students who are expelled from Innovations Academy shall be given a rehabilitation plan upon expulsion as developed by the Board at the time of the expulsion order, which may include, but is not limited to, periodic review as well as assessment at the time of review for readmission. The rehabilitation plan should include a date not later than one year from the date of expulsion when the pupil may reapply to the school for readmission.

14. Readmission

The decision to readmit a pupil or to admit a previously expelled pupil from another school district or charter school shall be in the sole discretion of the Innovations Academy Board following a meeting with the Director and the pupil and guardian or representative to determine whether the pupil has successfully completed the rehabilitation plan and to determine whether the pupil poses a threat to others or will be disruptive to the school environment. The Director shall make a recommendation to the Innovations Academy Board following the meeting regarding his or her determination.

The pupil's readmission is also contingent upon the Innovations Academy's capacity at the time the student seeks readmission.

(D) Procedures to Notify Teachers of Dangerous Pupils (EC 49079)

In order to fulfill the requirements made by Education Code 49079 and Welfare and Institutions Code 827 that state teachers must be notified of the reason(s) a student has been suspended. Innovations Academy has incorporated this notification into the existing "Attendance Reporting Screen." On the daily attendance report, when a student is suspended, it will show an "*" next to the student's name. The teacher can access the suspension by reading the suspension report in the front office. This information is for the student's current teachers only. All information regarding suspension or expulsion is CONFIDENTIAL, and is not to be shared with any student(s) or parent(s).

Pursuant to Welfare and Institution Code 827(b) and Education Code 48267, the Court notifies the director of Innovations Academy regarding students who have engaged in certain criminal conduct. This information is forwarded to the director. The director is responsible for prompt notification of the student's teachers. Per Education Code 49079, this information must be kept confidential. This information is also forwarded to all administrators and the student's counselor.

(E) Sexual Harassment Policies (EC 212.6 [b])

It is the objective of Innovations Academy to provide a working environment free from discrimination and conduct commonly referred to as sexual harassment.

The E.E.O.C. (Equal Employment Opportunity Commission) has provided a broad definition of sexual harassment. It is general in nature and may not always be clear when evaluating everyday situations.

“Unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature constitute sexual harassment when submission to such conduct is made either explicitly or implicitly a term or condition of an individual’s employment, submission to or rejection of such conduct by an individual is used as a basis for employment decisions affecting such individual, or such conduct has the purpose or effect of unreasonably interfering with an individual’s work performance or creating an intimidating, hostile, or offensive working environment.”

Sexual harassment refers to behavior inappropriate in the workplace because it is offensive, unwelcome behavior which would not occur but for the gender of the offended person. Both sexual harassment, and accusations of sexual harassment, are disrupting to the work environment.

If you or a co-worker experience what you believe to be sexual harassment or accusations of sexual harassment, report it promptly to the Director. Innovations Academy will investigate any employee, regardless of job position when such allegations are made. Based on available information, Innovations Academy will take appropriate action and communicate on a need-to-know basis. Appropriate disciplinary action, up to and including termination will be taken against any individual for sexual harassment charges determined to be valid.

(F) School-wide Dress Code Relating to Gang-Related Apparel (EC 35183)

Innovations Academy believes that socially responsible behavior is crucial to improving and maintaining a climate of respect. Dress and grooming should not interfere with the educational process. School clothing should be neat, clean, maintain adequate coverage, be appropriate for school activities, and follow standards of common decency (no profanity, nondiscriminatory, sexually explicit clothing, etc.).

Footwear: Please wear or bring to school closed-toe athletic shoes for outdoor activities during P.E. The scheduling of P.E. can be unpredictable and classes often play active outdoor games. Please plan accordingly.

(G) Procedure for Safe Ingress and Egress of Pupils, Parents, and Staff to and from School (EC 35294.2)

Drop off in the morning begins a maximum of 30 minutes before start time (8:30 a.m.). Children must enter the school campus through the turnaround area gate. Once on campus all students are to remain on site. The gates are closed and locked at 8:30. All students arriving after 8:30 must sign in at the front office.

Pick up for Kindergarten starts at 2:00 on Tuesday-Friday. Parents/Guardians/Caregivers will meet their child at the classroom. In order to pick up a student, written permission needs to be given to our front office. The front office will communicate with teachers regarding permissions for pick up.

Pick up begins for 1st-8th at 3:00 dismissal for a 30 minute duration (until 3:30 p.m. T-Fri). Parents have the responsibility and authority to decide how their child is picked up. If a parent chooses for their child to walk home or walk across the street or walk off campus, they must communicate this with their child and teacher. We encourage parents to come into the classroom at least one time per week to pick up their child(ren) if conditions allow. This fosters communication between parents/care-givers and teachers and allows parents to see student work.

Any child, K-5, going home with another family for a play date must have a signed note (or email) to be given to their teacher that day or earlier or their guardian(s) must have notified the office. Ride coordination can take up quite a bit of time, please be respectful that teachers have tasks ahead of them after school gets out.

Any child remaining after pick up time has ended will be sent to the office. This is disruptive of staff time, so please plan accordingly. Supervision can not be guaranteed after 3:45 p.m.

Entrances and Exits

The Director and Assistant Director will develop procedures so that students, staff, parents, and community members can enter and exit the building in a safe and orderly way, and that the building is secure from unauthorized entry during non-school hours as follows:

Training staff to lock and maintain the security of the school building and grounds when not in session (e.g. not propping doors that are not being regularly used, locking up in the evening, etc.).

Posting signs that visitors sign in at the main office.

Establishing a culture in which any adults without a visitor label and any children not enrolled at the school are escorted immediately to the main office.

Creating a dismissal plan and student pick-up plan to ensure the safety of all students.

Staff is responsible for releasing students to parents, legal guardians or other persons designated by parents or legal guardians, unless formally modified by a court order served to the school. In the event that employees are uncertain of the propriety of releasing a student, they should locate or contact the Director before releasing the student.

Parent Responsibilities

Parents are responsible for ensuring the safe arrival/dismissal of their child to/ from school. This includes but is not limited to:

Ensuring that Innovations Academy has the necessary paperwork for anyone picking up the child from school.

Having the parent call in or bring a signed note if the child is to go home with a friend.

Following seatbelt laws at all times.

Students biking, rollerblading, skateboarding, etc. to school must wear an appropriate helmet.

Students taking public transportation must know which route to take as well as how to walk to school from the drop off location.

Visitors Policy

Innovations Academy encourages interested members of the community to visit our school. To avoid potential disruptions to learning, to provide visitors with the information they need, and for the safety of students and staff, ALL visitors should register immediately upon entering the school building.

Visitors shall sign in at the beginning of their visit, receive a visitor label, and sign out at the end of their visit. Students from other schools as well as students who have ended their school day are not to be on campus unless accompanied by parents/guardians or with the permission of the site administrator.

In registering as a visitor, the sign-in form will include spaces for the following information:

Name;

His/her purpose for entering school grounds;

Destination within the school

Time in and out

At his/her discretion, the Director, office manager or designee may also request proof of identity

address
occupation and company affiliation
age (if less than 21); and any other information consistent with the law.

Parents and guardians visiting during the school day for any purpose other than picking up at or dropping off a child at the beginning or end of the school day as

part of the normal school day schedule should also be requested to sign into the visitor log or a special log for parents. This applies to parents and guardians who are picking up a student early (e.g. for a medical reason) or dropping off a student late (e.g. tardy), as well as parents and guardians who are on campus to volunteer in their child's classroom.

However, formal visitor registration is at the discretion of the school Director or designee. VIP Visitors accompanied by any Innovations Academy management team member may be requested to register as a visitor at the discretion of the accompanying Innovations Academy management team member.

The Director or designee may refuse to register any visitor if he or she reasonably concludes that the visitor's/outsider's presence would disrupt the school, students or employees, would result in damage to property, or would result in the distribution or use of a controlled substance.

The Director or designee may request that a visitor/outsider who has failed to register, or whose registration privileges have been denied or revoked, to promptly leave school grounds. If necessary, the Director or designee may call the local police to enforce the departure of the visitor/outsider. When a visitor/ outsider is directed to leave, the Director or designee shall inform the visitor/ outsider that if he or she reenters the school within seven (7) days, he or she will be guilty of a misdemeanor and subject to a fine and/or imprisonment.

All schools will inform parents annually about the school's policies regarding visitors/outside, and remind parents that to maximize safety and security they should also register when visiting the school.

This visitor/outsider policy is subject to the further terms and conditions contained in Innovations Academy's Registered Sex Offender Policy, set forth below.

(H) A Safe and Orderly School Environment Conducive to Learning (EC 35294.2)

Component:

The Social Environment (People and Programs)

Element:

Student Safety

Opportunity for Improvement:

Campus Safety

Objectives	Action Steps	Resources	Lead Person	Evaluation
By Spring of 2025, all school visitors will consistently wear visitor badge identification when entering the building between the hours of 8:30am and 3:00pm.	Create clear signage for signing in. Create multiple visitor badges.	Create signage and visitor badges.	Site Admin.	Observation of visitors wearing badges around campus.

Component:

The Physical Environment (Facilities)

Element:

Campus Safety

Opportunity for Improvement:

Safety Measures

Objectives	Action Steps	Resources	Lead Person	Evaluation
By Spring of 2025, all staff will consistently lock all gates that lead outside of the facilities.	Purchase and copy enough gate keys for all staff. Chain all locks to the fence so they do not get lost.	Chains and gate keys.	Facilities Manager	Gate locks are secured at all times they're not being actively used.

Component:

Element:

Opportunity for Improvement:

Objectives	Action Steps	Resources	Lead Person	Evaluation

(I) School Discipline Rules and Consequences (EC 35291 and EC 35291.5)

Innovations Academy Student Conduct Code

Conduct Code Procedures

see 2021-22 Family Handbook for information about Positive Discipline implementation at Innovations Academy

(K) Hate Crime Reporting Procedures and Policies

Any student who feels that he/she is a victim of hate-motivated behavior shall immediately contact the principal or designee. If the student believes that the situation has not been remedied by the principal or designee, he/she may file a complaint in accordance with Innovations Academy complaint procedures.

Staff who receive notice of hate-motivated behavior or personally observe such behavior shall notify the principal, or designee, and law enforcement, as appropriate. Students demonstrating hate-motivated behavior shall be subject to discipline in accordance with Board policy and administrative regulation. Refer to the Family Handbook for more details on how to submit a complaint.

(J) Procedures to Prepare for Active Shooters

Innovations Academy has decided not to disclose specific response to an active school shooter. See general procedures for shelter-in-place, lockdown and evacuation plans.

Procedures for Preventing Acts of Bullying and Cyber-bullying

Prohibited Bullying

Bullying is defined as any severe or pervasive physical or verbal act or conduct, including communications made in writing or by means of an electronic act. Bullying includes one or more acts committed by a student or group of students that may constitute sexual harassment, hate violence, or creates an intimidating and/or hostile educational environment, directed toward one or more students that has or can be reasonably predicted to have the effect of one or more of the following:

Placing a reasonable student or students in fear of harm to that student's or those students' person or property.

Causing a reasonable student to experience a substantially detrimental effect on his or her physical or mental health.

Causing a reasonable student to experience a substantial interference with his or her academic performance.

Causing a reasonable student to experience a substantial interference with his or her ability to participate in or benefit from the services, activities, or privileges provided by IA.

Cyberbullying is an electronic act that includes the transmission of harassing communication, direct threats, or other harmful texts, sounds, or images on the Internet, social media, or other technologies using a telephone, computer, or any wireless communication device. Cyberbullying also includes breaking into another person's electronic account and assuming that person's identity in order to damage that person's reputation.

IA has adopted the following procedures for preventing acts of bullying, including cyberbullying.

Bullying/Cyberbullying Prevention Procedures

IA advises students:

To never share passwords, personal data, or private photos online.

To think about what they are doing carefully before posting and by emphasizing that comments cannot be retracted once they are posted.

That personal information revealed on social media can be shared with anyone including parents, teachers, administrators, and potential employers. Students should never reveal information that would make them uncomfortable if the world had access to it.

To consider how it would feel receiving such comments before making comments about others online.

IA informs Charter School employees, students, and parents/guardians of IA's policies regarding the use of technology in and out of the classroom. IA encourages parents/guardians to discuss these policies with their children to ensure their children understand and comply with such policies.

Education

IA employees cannot always be present when bullying incidents occur, so educating students about bullying is a key prevention technique to limit bullying from happening. IA advises students that hateful and/or demeaning behavior is inappropriate and unacceptable in our society and at IA and encourages students to practice compassion and respect each other.

Charter School educates students to accept all student peers regardless of protected characteristics (including but not limited to actual or perceived sexual orientation, gender identification, physical or cognitive disabilities, race, ethnicity, religion, and immigration status) and about the negative impact of bullying other students based on protected characteristics.

IA's bullying prevention education also discusses the differences between appropriate and inappropriate behaviors and includes sample situations to help students learn and practice appropriate behavior and to develop techniques and strategies to respond in a non-aggressive way to bullying-type behaviors. Students will also develop confidence and learn how to advocate for themselves and others, and when to go to an adult for help.

IA informs IA employees, students, and parents/guardians of this Policy and encourages parents/guardians to discuss this Policy with their children to ensure their children understand and comply with this Policy.

Professional Development

IA annually makes available the online training module developed by the California Department of Education pursuant Education Code section 32283.5(a) to its certificated employees and all other IA employees who have regular interaction with students.

IA informs certificated employees about the common signs that a student is a target of bullying including:

- Physical cuts or injuries
- Lost or broken personal items
- Fear of going to school/practice/games
- Loss of interest in school, activities, or friends
- Trouble sleeping or eating
- Anxious/sick/nervous behavior or distracted appearance
- Self-destructiveness or displays of odd behavior
- Decreased self-esteem

Charter School also informs certificated employees about the groups of students determined by IA, and available research, to be at elevated risk for bullying. These groups include but are not limited to:

Students who are lesbian, gay, bisexual, transgender, or questioning youth (“LGBTQ”) and those youth perceived as LGBTQ; and
Students with physical or learning disabilities.

IA encourages its employees to demonstrate effective problem-solving, anger management, and self-confidence skills for IA’s students.

Opioid Prevention and Life-Saving Response Procedures

Innovations Academy is a K-8 small school and this has not been an issue at our school. We keep parents informed about the warning signs of access and use as well as the dangers and appropriate responses. We encourage them to inform us of any issues related to drug use in the family.

This information is on our website and sent to parents annually.

Deaths from fake pills with fentanyl are surging across California and the country. Children purchase what they think are OxyContin, Percocet or Xanax pills via social media, but drug dealers are making these fake pills with the cheaper, stronger and more deadly synthetic drug called fentanyl to increase their profits. Fentanyl is up to 50 times more potent than heroin and 100 times more potent than morphine. Fentanyl is odorless, tasteless and colorless. One pill can kill.

The tablets are so well made that even experienced users say that they cannot tell the difference between a counterfeit pill and a pill manufactured by a pharmaceutical company.

The amount of fentanyl needed to overdose and die is equivalent to two grains of sand. These are not pharmaceutical-grade painkillers. Instead, they are pills made by drug dealers, mostly outside the country. There is no quality control. Pills in the same batch can have wildly varying levels of fentanyl.

The Centers for Disease Control and Prevention issued a health alert in December 2020, because of an increase in synthetic opioids in the western United States.

According to the California Department of Public Health (CDPH) California Overdose Surveillance Dashboard:

Emergency department visits related to non-fatal opioid overdoses in California’s youth ages 10 to 19 have increased 226 percent from 2018 (379 total) to 2021 (1,237 total).

Opioid-related overdose deaths in California’s youth ages 10 to 19 increased from 2018 (54 total) to 2021 (245 total), marking a 353 percent increase during two years, largely driven by fentanyl.

Fentanyl-related overdose deaths in California's youth ages 10 to 19 increased from 2018 (36 total) to 2021 (239 total), a 563 percent increase.

Officials say that young people find pills especially appealing, because they are cheap, more socially acceptable than meth or heroin, and do not have a tell-tale smell like alcohol or marijuana.

How can you help?

One of the best ways to protect kids from substance abuse is by having regular and open conversations to educate them about the risks. Listen to them without judgment. Also monitor their social media use. Drugs are often offered by someone who they know or a stranger who they met on social media.

Watch for changes in their behavior including:

Irregular eating or sleeping patterns

Low energy

General signs of depression or anxiety

Unusual irritability

Slipping grades

Lack of interest in activities the individual once loved

Drastic clothing style changes

If you notice a change, ask about it. Trust your instincts.

Pills from friends and pills purchased online or from social media are not safe. If a pill comes from anyone other than a doctor or pharmacist, do not take it. It could be a fake pill.

Fake pills are not controlled. Each pill can have a different amount of drug. Every fake pill is a risk.

Pills prescribed by a doctor (for an individual) should ONLY be used by that person and be used EXACTLY as instructed. Do not take pills that are prescribed for someone else or that you receive from friends or other sources.

Everybody is different. A pill that is safe for one person can be harmful for someone else.

Any pill can be dangerous if it is taken wrongly (including too much or too often).

Fake pills can look just like real pills. A fake fentanyl-laced pill can be any color. These fake pills are often blue, greenish, or pale-colored. More recently, law enforcement officers have seized fentanyl pressed into multi-colored pills that look like candy.

Some fake pills have marks that look like real pills. Some are marked "M30," "K9," "215," or "V48." Fake pills may have other markings or no markings.

Schools and families want to help. It's ok to ask for help.

Students who tell us they are using drugs, or ask for help, will not be punished.

Students can speak with a school counselor, wellness staff, or another trusted adult.

Fentanyl Awareness Webinar

San Diego County Prescription Drug Abuse Task Force website

San Diego County Office of Education website

Community & Parent Toolkits: Education & Awareness

National Harm Reduction Center: Recognizing Opioid Overdose

Up2SD.org

California Department of Public Health: Naloxone FAQ

Expect Fentanyl (sccgov.org)

Fentanyl Takes Friends (sccgov.org)

Song for Charlie (Non-Profit Charity)

One Pill Can Kill (dea.gov)

The Real Deal on Fentanyl – Get the Facts (Ad Council)

Parents (dropthebomb.com) (Ad Council)

They Didn't Ask for Fentanyl by Carlmont High School journalism students
California Overdose Surveillance Dashboard
Fentanyl (cdph.ca.gov)
Naloxone Distribution's Project FAQs page
24-hour National Suicide Prevention Line: Call or Text to 988
24/7 Crisis Text Line: Text "HOME" to 741741

Response Procedures for Dangerous, Violent, or Unlawful Activities
See Workplace Violence Prevention Plan for more information

Safety Plan Review, Evaluation and Amendment Procedures

School stakeholders will review and evaluate the Safety Plan relevant to the needs and resources of Innovations Academy. Local law enforcement will be consulted in the development of the plan, as well as the school advisory committee when practical (Education Code 35294.1, 35294.2). The School advisory committee may delegate the responsibility for writing and developing a school safety plan to a school safety planning committee.

The School advisory committee shall evaluate, and amend as necessary, the safety plan at least once a year to ensure the plan is properly implemented. (Education Code 35294.2). Emergency Response Protocol Drills are planned and held at regular intervals throughout the year. Following each drill, all staff receives notification regarding adherence to the protocol and what procedures are being amended based on problems discovered during the drill, when necessary. This information is shared with the advisory committee or safety committee to use when reviewing, evaluating, and amending the school safety plan.

Safety Plan Appendices

Emergency Contact Numbers

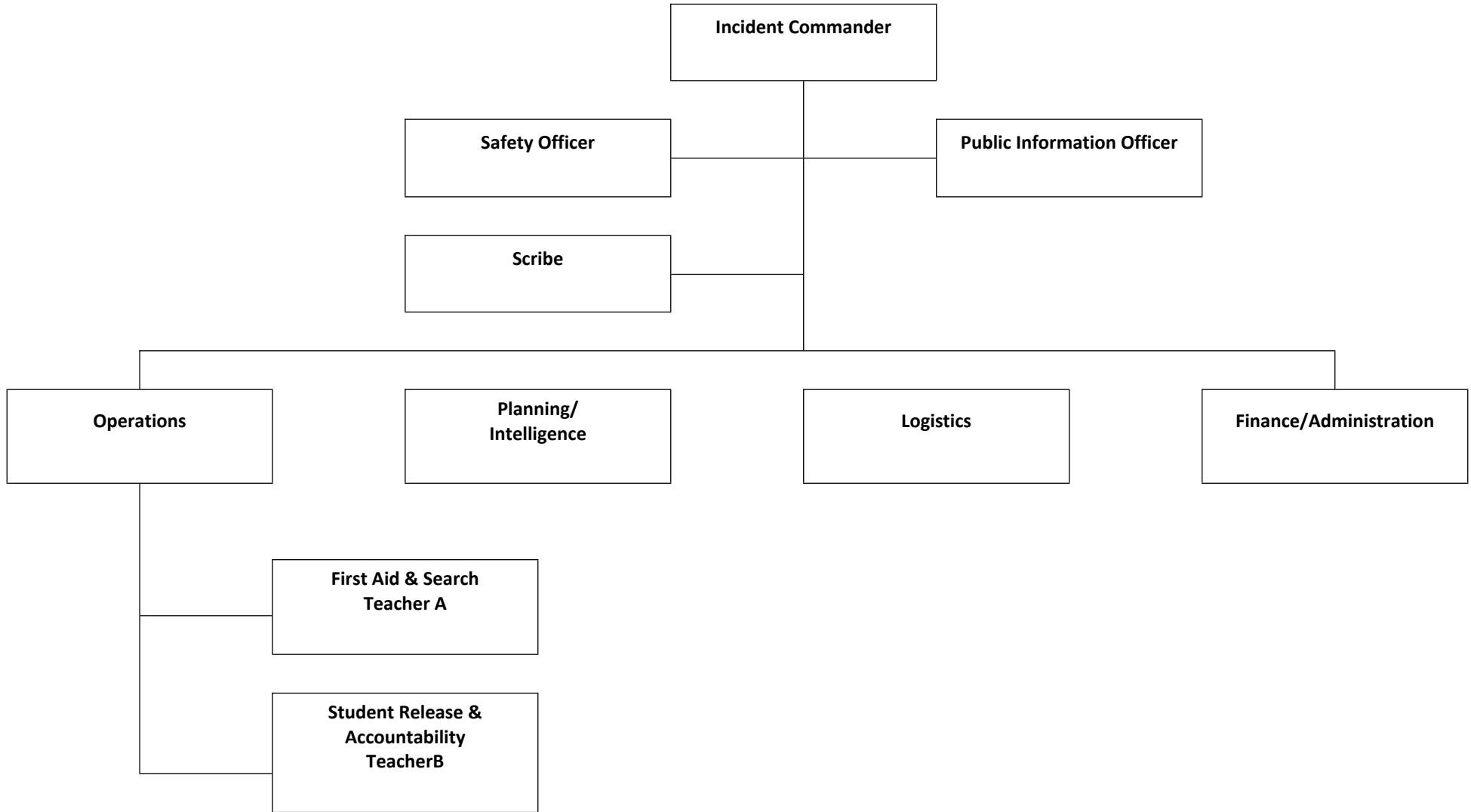
Utilities, Responders and Communication Resources

Type	Vendor	Number	Comments
Emergency Services	all emergencies	911	
Law Enforcement/Fire/Paramedic	Police Department	619-221-8985	
Law Enforcement/Fire/Paramedic	Fire Department	619-533-4430	
Emergency Services	Poison Control	800-222-1222	
Other	Child Protective Services	858-694-5141	
	School Director, Christine	619-379-9275	
	School Assistant Director, Devon	707-227-7114	

Safety Plan Review, Evaluation and Amendment Procedures

Activity Description (i.e. review steps, meetings conducted, approvals, etc)	Date and Time	Attached Document (description and location)
Communication of Plan	Fall of 2024	
Law Enforcement Review	October 2024	
Fire Review	October 2024	
School Board Review and Approval	October 2024	

Innovations Academy Incident Command System



Incident Command Team Responsibilities

Standardized Emergency Response Management System Overview

The California Standardized Emergency Management System (SEMS) is designed to centralize and coordinate emergency response through the use of standardized terminology and processes. This greatly facilitates the flow of information and resources among the agencies participating in response to an emergency. SEMS consists of five functions:

Innovations Academy

Management

During an emergency, the Incident Commander directs response actions from a designated Command Post. To effectively do this, the Incident Commander must constantly assess the situation, and develop and implement appropriate strategies. The Incident Commander must be familiar with the available resources, accurately document all response actions, and effectively communicate response strategies to others participating in the response. This function is typically filled by the school principal. The principal is assisted in carrying out this function by a Public Information & Liaison Officer and Safety Officer.

Planning & Intelligence

Planning and Intelligence involves the use of various methods to efficiently gather information, weigh and document the information for significance, and actively assess the status of the emergency. This understanding and knowledge about the situation at hand is vital to the effective management of a response. These activities are performed by a single person who reports directly to the Incident Commander.

Operations

All response actions are implemented under by Operations. This includes staff performing first aid, crisis intervention, search and rescue, site security, damage assessment, evacuations, and the release of students.

Logistics

Logistics supports the response by coordinating personnel; assembling and deploying volunteers; providing supplies, equipment, and services; and facilitating communications among emergency responders.

Finance & Administration

Finance & Administration involves the purchasing of all necessary materials, tracking financial records, timekeeping for emergency responders, and recovering school records following an emergency. These activities are performed by a single person who reports directly to the Incident Commander.

Emergency Response Guidelines

Step One: Identify the Type of Emergency

When an emergency situation occurs, school personnel must quickly determine what initial response actions are required. Determining the appropriate actions to take is a multistep process: 1. Identify the type of emergency. 2. Identify the level of emergency. 3. determine the immediate response action. 4. Communicate the immediate response action.

The first step in responding to an emergency is to determine the type of emergency that has occurred. Emergency procedures for a variety of emergencies are provided in this plan for the following:

Aircraft Crash Animal Disturbance
Armed Assault on Campus Biological or Chemical Release Bomb Threat/Threat of Violence Bus Disaster
Disorderly Conduct Earthquake
Explosion or Risk of Explosion Fire in Surrounding Area
Fire on School Grounds Flooding
Loss or failure of Utilities Motor Vehicle Crash Psychological Trauma Contamination of Food/Water
Unlawful Demonstration or Walkout

Step Two: Identify the Level of Emergency

The second step in responding to an emergency is to determine the level of the emergency. Each situation requires adherence to the policy below. In cooperation with local law enforcement and emergency services personnel, the following categories have been defined for emergency situations at Innovations Academy.

Level 1: Highest Threat to Life -- A major emergency that requires outside agencies such as a major earthquake, civil disturbance, or a large-scale act of terrorism. For a Level 1 emergency, it is important to remember that response time of outside agencies may be delayed.

Level 2: Moderate Threat--A moderate emergency that required assistance from outside agencies are those that are serious, but may not create an immediate threat to life, such as fire, moderate earthquake, or a suspected act of terrorism.

Level 3: Lowest Threat-- A minor emergency that is handled by school personnel without assistance from outside agencies, such as a temporary power outage, minor earthquake, or minor injury on the playground.

Step Three: Determine the Immediate Response Action

The possible immediate response actions to be taken during emergency situations are:

Duck and Cover -- to protect students and staff from flying or falling debris.

Shelter in Place -- to place and/or keep students and staff indoors for a greater level of protections.

Lock Down-- when a threat of violence or gunfire is identified and to prevent perpetrator/s from entering an area.

Evacuation-- when determination is made that it is unsafe to remain in a building.

Offsite Evacuation-- when remaining on campus is determined to be unsafe and off-site evacuation is necessary.

All Clear-- to notify students and staff that normal school operations may resume.

Step Four: Communicate the Appropriate Response Action

Once school and/or district leaders have determined the type and level of emergency, then selected an immediate response action, then school and/or district leaders will communicate to staff and students the response action. As appropriate, such communication will also be distributed via the school's PA system and other communication platforms such as ParentSquare. The principal will periodically provide updates of the situation and emergency response as appropriate until the situation is resolved. The principal and/or superintendent will utilize communication platforms to inform parents and community stakeholders about the situation as appropriate.

Types of Emergencies & Specific Procedures

Aircraft Crash

Shelter-In-Place

When a hazardous substance such as a chemical, biological, or radiological contaminant is released into the environment, “Shelter-in-Place” is a common method of protecting students from exposure. While similar to a “Lockdown,” the critical difference between the responses is the shutdown of the air handling systems in a “Shelter-in-Place” response. In order to quickly implement the procedure, it is necessary that facility personnel be familiar with the location and operation of the heating, ventilation, and air conditioning (HVAC) system. Some of the information that should be gathered to prepare for this response include:

- Identify and record the location of all air intake vents, HVAC shutdown switches and access keys
- Identify and record the location of all other points where outside air can enter the building (e.g., ventilation grills, gaps under doors)
- Train team members (e.g., maintenance workers, custodians) who will be asked to respond

When to Shelter-In-Place :

- Explosion
- Hazardous Materials Incident
- Animal Disturbance
- Aircraft Crash

Shelter-In-Place Procedures

- Notify staff and students via:

o An announcement over the PA:

“Your attention please, your attention please. Due to the _____ students and staff should immediately prepare to Shelter-In-Place and stand by for further instructions.

OR

o If it is safe to do so, send runners to each classroom with the above information. Be sure all classrooms, libraries, cafeterias, gymnasiums, and all other on-campus programs and offices are also notified.

- Order facilities manager or custodian to shut down air circulation system
- Turn on radio and monitor updates. Order staff to seal doors and vents if necessary.
- Activate Parent Alert System (phone tree, if one is in place or other method). Request that parents DO NOT come to school until safe to do so.
- Post signs on exterior windows, if there is time and it is safe to do so:

“This school is sheltering-in-place. Do not attempt to enter any office or building”

Shelter-In-Place Preparations:

- In classrooms and offices:

o Post “Shelter-In-Place” sign on exterior door or window, if safe to do so

o Shut doors and all windows, pull draperies or close blinds

o Seal doors and vents with plastic wrap and duct tape, if available and ordered to do so

o Take out class roster and take roll

o Wait for an announcement or communication of “all clear” before releasing anyone or opening doors and windows

- In the gymnasium or theater:

o Move students and staff into a hallway or small room

o Shut doors and all windows, pull draperies or close blinds

o Seal doors and vents with plastic wrap and duct tape, if available and ordered to do so

o Write down names of everyone in the room or collect sign-in sheets

o Wait for an announcement or communication of “all clear” before releasing anyone or opening doors and windows

- Outdoors:

- o Move inside the nearest building
- o Shut doors and all windows, pull draperies or close blinds
- o Seal doors and vents with plastic wrap and duct tape, if available and ordered to do so
- o Write down names of everyone in the room or collect sign-in sheets
- o Wait for an announcement or communication of “all clear” before releasing anyone or opening doors and windows

Note: A request to “Shelter-In-Place” is usually of short duration (a few hours), so there is little danger that you will run out of oxygen or suffocate.

Animal Disturbance

Shelter-In-Place

“Shelter- in-Place” is a common method of protecting students from exposure to an unsafe incident involving an unknown or dangerous animal.

- Train team members (e.g., maintenance workers, custodians) who will be asked to respond

Shelter-In-Place Procedures

- Notify District Office
- Notify staff and students via: An announcement over the PA: “Your attention please, your attention please. Due to the current situation, students and staff should immediately prepare to Shelter-In-Place and stand by for further instructions.”

OR

- If it is safe to do so, send runners to each classroom with the above information. Be sure all classrooms, gymnasiums, and all other on-campus programs and offices are also notified.
- Activate Parent Alert System (phone tree, if one is in place or other method). Request that parents DO NOT come to school until safe to do so.
- Post signs on exterior windows, if there is time and it is safe to do so: “This school is sheltering-in-place. Do not attempt to enter any office or building”

Shelter-In-Place Preparations:

In classrooms and offices:

- Post “Shelter-In-Place” sign on exterior door or window, if safe to do so
- Shut doors and all windows, pull draperies or close blinds
- Take out class roster and take roll
- Wait for an announcement or communication of “all clear” before releasing anyone or opening doors and windows

In the gymnasium or theater:

- Move students and staff inside the nearest building, move to a smaller room or hallway
- Shut doors and all windows, pull draperies or close blinds
- Write down names of everyone in the room or collect sign-in sheets
- Wait for an announcement or communication of “all clear” before releasing anyone or opening doors and windows

Outdoors:

- Move students and staff inside the nearest building, move to a smaller room or hallway
- Shut doors and all windows, pull draperies or close blinds
- Write down names of everyone in the room or collect sign-in sheets
- Wait for an announcement or communication of “all clear” before releasing anyone or opening doors and windows

Armed Assault on Campus

School Comprehensive School Safety Plans should include courses of action that will describe how students and staff can most effectively respond to an active shooter situation to minimize the loss of life, and teach and train on these practices, as deemed appropriate by the school.

Law enforcement officers may not be present when a shooting begins. The first law enforcement officers on the scene may arrive after the shooting has ended. Making sure the staff knows how to respond and instruct their students can help prevent and reduce the loss of life.

No single response fits all active shooter situations; however, making sure each individual knows his or her options for response and can react decisively will save valuable time. Depicting scenarios and considering response options in advance will assist individuals and groups in quickly selecting their best course of action.

Understandably, this is a sensitive topic. There is no single answer for what to do, but a survival mindset can increase the odds of surviving. As appropriate for your community, it may be valuable to schedule a time for an open conversation regarding this topic. Though some parents or personnel may find the conversation uncomfortable, they may also find it reassuring to know that, as a whole, their school is thinking about how best to deal with this situation.

During an active shooter situation, the natural human reaction, even if you are highly trained, is to be startled, feel fear and anxiety, and even experience initial disbelief and denial. You can expect to hear noise from alarms, gunfire and explosions, and people shouting and screaming. Training provides the means to regain your composure, recall at least some of what you have learned, and commit to action. There are three basic options: run, hide, or fight. You can run away from the shooter, seek a secure place where you can hide and/or deny the shooter access, or incapacitate the shooter to survive and protect others from harm.

As the situation develops, it is possible that students and staff will need to use more than one option. During an active shooter situation, staff will rarely have all of the information they need to make a fully informed decision about which option is best. While they should follow the plan and any instructions given during an incident, often they will have to rely on their own judgment to decide which option will best protect lives.

Respond Immediately

It is not uncommon for people confronted with a threat to first deny the possible danger rather than respond. An investigation by the National Institute of Standards and Technology (2005) into the collapse of the World Trade Center towers on September 11, 2001, found that people close to the floors impacted waited longer to start evacuating than those on unaffected floors. Similarly, during the Virginia Tech shooting, individuals on campus responded to the shooting with varying degrees of urgency. These studies highlight this delayed response or denial. For example, some people report hearing firecrackers when in fact they heard gunfire.

Train staff to overcome denial and to respond immediately, including fulfilling their responsibilities for individuals in their charge. For example, train staff to recognize the sounds of danger, act, and forcefully communicate the danger and necessary action (e.g., "Gun! Get out!") to those in their charge. In addition, those closest to the public address or other communications system, or otherwise able to alert others, should communicate the danger and necessary action. Repetition in training and preparedness shortens the time it takes to orient, observe, and act.

Upon recognizing the danger, as soon as it is safe to do so, staff or others must alert responders by contacting 911 with as clear and accurate information as possible.

Run

If it is safe to do so for yourself and those in your care, the first course of action that should be taken is to run out of the building and far away until you are in a safe location.

Students and staff should be trained to

- Leave personal belongings behind;
- Visualize possible escape routes, including physically accessible routes for students and staff with disabilities as well as persons with access and functional needs;
- Avoid escalators and elevators;

- Take others with them, but not to stay behind because others will not go; Call 911 when safe to do so; and
- Let a responsible adult know where they are.

Hide

If running is not a safe option, hide in as safe a place as possible.

Students and staff should be trained to hide in a location where the walls might be thicker and have fewer windows. In addition:

- Lock the doors;
- Barricade the doors with heavy furniture;
- Close and lock windows and close blinds or cover windows;
- Turn off lights;
- Silence all electronic devices;
- Remain silent;
- Hide along the wall closest to the exit but out of the view from the hallway (allowing for an ambush of the shooter and for

possible escape if the shooter enters the room);

- Use strategies to silently communicate with first responders if possible, for example, in rooms with exterior windows make

signs to silently signal law enforcement officers and emergency responders to indicate the status of the room's occupants; and

- Remain in place until given an all clear by identifiable law enforcement officers.

Fight

If neither running nor hiding is a safe option, as a last resort when confronted by the shooter, adults in immediate danger should consider trying to disrupt or incapacitate the shooter by using aggressive force and items in their environment, such as fire extinguishers, and chairs. In a study of 41 active shooter events that ended before law enforcement officers arrived, the potential victims stopped the attacker themselves in 16 instances. In 13 of those cases they physically subdued the attacker. While talking to staff about confronting a shooter may be daunting and upsetting for some, they should know that they may be able to successfully take action to save lives. To be clear, confronting an active shooter should never be a requirement in any school employee's job description; how each staff member chooses to respond if directly confronted by an active shooter is up to him or her. Further, the possibility of an active shooter situation is not justification for the presence of firearms on campus in the hands of any personnel other than law enforcement officers.

LOCKDOWN & SHELTER IN PLACE PROCEDURES

STEP 1 - GET INSIDE

Direct all students and staff to go to the nearest room if caught outside.

STEP 2 - LOCK ALL DOORS

Teachers and staff must lock all doors leading into the classroom or office including interior doors that connect to other rooms. Close all window coverings.

STEP 3 - DUCK & COVER

Stay away from windows and doors.
Instruct students to lie down on the floor.

STEP 4 - REMAIN QUIET

Instruct students not to talk in order to avoid bringing attention to your room.

STEP 5 - WAIT

Instruct students to stay in position until an evacuation has been announced.

STEP 6 - EVACUATE

Go To your designated safety area

STEP 7 - RETURN TO CLASS

Receive notification to return to class
Escort students back to class.

Biological or Chemical Release

Shelter-In-Place

When a hazardous substance such as a chemical, biological, or radiological contaminant is released into the environment, "Shelter-in-Place" is a common method of protecting students from exposure. While similar to a "Lockdown," the critical difference between the responses is the shutdown of the air handling systems in a "Shelter-in-Place" response. In order to quickly implement the procedure, it is necessary that facility personnel be familiar with the location and operation of the heating, ventilation, and air conditioning (HVAC) system. Some of the information that should be gathered to prepare for this response include:

- Identify and record the location of all air intake vents, HVAC shutdown switches and access keys
- Identify and record the location of all other points where outside air can enter the building (e.g., ventilation grills, gaps under doors)
- Train team members (e.g., maintenance workers, custodians) who will be asked to respond

When to Shelter-In-Place :

- Radiological Incident

- Hazardous Materials Incident

Shelter-In-Place Procedures

- Notify District Office
- Notify staff and students via:

o An announcement over the PA:

"Your attention please, your attention please. Due to the students and staff should immediately prepare to Shelter-In-Place and stand by for further instructions."

OR

o If it is safe to do so, send runners to each classroom with the above information. Be sure all classrooms, gymnasiums, and all other on-campus programs and offices are also notified.

- Order facilities manager or custodian to shut down air circulation system
- Turn on radio and monitor updates. Order staff to seal doors and vents if necessary.
- Activate Parent Alert System (phone tree, if one is in place or other method). Request that parents DO NOT come to school until safe to do so.
- Post signs on exterior windows, if there is time and it is safe to do so: "This school is sheltering-in-place. Do not attempt to enter any office or building"

Bomb Threat/ Threat Of violence

Schools can receive bomb threats via telephone, mail, or someone may simply notice a suspicious package.

Telephone

In the event that the school receives a bomb threat by telephone:

- Listen, do not interrupt the caller.
- Keep the caller on the line with statements such as "I'm sorry, I didn't understand you. What did you say?"
- Alert someone else by prearranged signal to call 9-1-1 and notify the telephone company to trace the call while the caller is on the line. Tell the operator the name of the school, the name of the caller, and the phone number on which the bomb threat came in.
- Notice details: background noises, voice description
- Notify the site administrator immediately after completing the call.

Mail

In the event that the school receives a bomb threat by mail:

- Note the manner in which the threat was delivered, where it was found and who found it.
- Limit handling of item by immediately placing it in an envelope so that fingerprints may be detected. Written threats should be turned over to law enforcement.
- Notify principal or site administrator.

Suspicious package

In the event that a suspicious package is found on campus:

- Caution students against picking up or touching any strange objects or packages
- Notify principal or site administrator

Principal/Site Administrator Actions

- Call 9-1-1
- Instruct staff and students to turn off any pagers, cellular phones, or two-way radios. Use of these devices may trigger explosive devices.
- Determine whether to evacuate the threatened building and adjoining buildings. Modify evacuation routes as necessary to bypass the location of the bomb, if known. Keep in mind that evacuation may not be the best response
- Use the intercom, runners, or the PA system to evacuate threatened rooms.
- Direct a staff to look for suspicious packages, boxes or foreign objects. If suspicious item is found, note the location, description, and report to the principal/site administrator, but make no attempt to investigate or examine the object.
- If it is necessary to evacuate the entire school, use the fire alarm.
- Notify the superintendent of the situation.

- Direct a search team to look for suspicious packages, boxes or foreign objects in work areas, public areas, unlocked closets, exterior areas, and power sources. If suspicious item is found, note the location, description, and report to the principal/site administrator, but make no attempt to investigate or examine the object.
- Do not return to the school building until it has been inspected and determined safe by emergency response officials.
- Avoid publicizing the threat any more than necessary.

Bus Disaster

These procedures are for use by bus drivers and school administrators in the event of an emergency that occurs while students are on a field trip or being transported to or from school. In all circumstances drivers should report to the Director of Transportation via 2-way radio or cell phone if necessary.

Procedure

The driver is to take the following steps:

1. Pull to a safe point on the side of road, away from buildings, poles, wires, and bridges.
2. Set brakes and turn off the ignition.
3. Contact IA via 2-way radio or cell phone with pertinent information as soon as it is safe to do so, or when directed by public safety personnel.
4. Teachers and the driver should remain calm and reassure the passengers.
5. Assess injuries to passengers /self. Provide first aid as appropriate.
6. Using route manifests account for all students and staff.
7. When necessary, evacuate the bus per evacuation procedures if there is smoke or fire.
8. If applicable, activate emergency hazard flashers and place reflectors in the designated locations.

Disorderly Conduct

Use the HEAR method of actions for de-escalating emotional situations:

H Hear the person out. Let the frustrated customer tell their side of the story and vent their feelings.

E Empathize, acknowledge and respond to customer's feelings.

A Ask/answer questions. Ask the customer questions to get the information you need to help with their situation.

R Take responsibility for assisting in helping the customer to resolve the problem.

Violence in the work place is increasing and must be considered carefully as to what type of threat merits what type of response. There are two basic categories of threats. One is "implied"; the other is "real."

ACTIONS FOR THREATS:

If the person is threatening you, give them space and keep them in front of you. If possible, keep your back to the nearest exit; in clear, simple language identify the consequences of threatening behavior to the person; e.g., the person may be asked to leave. Stay calm, professional, and focused on identifying the problem and solution.

IMPLIED THREATS: This can include a threat of a return visit to "get even" or do harm.

This type of threat should be evaluated very carefully as to the emotions at the time of the treat or the cause of the threat. This type of threat could easily escalate into violence. Precautions should be taken to avoid a one-on-one confrontation after a threat is received from a potentially dangerous individual. Always notify the Director, Assistant Director or Office Manager.

When threat comes from a co-worker, it may be appropriate for the Director to request an evaluation of the "aggressor's" personal employment history. The principal or designee should interview the people who work directly with the potential aggressor to acquire information such as: Does the person have ready access to weapons? Has the individual been openly vocal about personal problems or work problems, or has he/she been making open threats? If the threat is considered to be "real," Human Resources should notify law enforcement immediately.

REAL THREATS: You are physically confronted by a co-worker or client with intent and ability to do bodily harm.

You must stay very calm and try to calm the person down verbally. Agree with the person, even if you disagree. It is safer to agree than to force a confrontation.

Do not do anything to escalate the situation. Try to notify other staff of the situation and the potential danger, without being obvious.

If possible, dial 911; leave the line open if you cannot talk directly. In most cases, Emergency operators will be able to listen and trace the call's origin. Emphasize key words such as weapon, bomb, hostage and location to tip the police to your circumstances. Ask questions that will direct the anger away from you. Do everything you can to direct the person's anger to someone or something that is in another location. You need to take as much time as you can to try to remove yourself from the threat or buy time to allow help to arrive.

The person you are dealing with may or may not be rational. Be very careful not to make any sudden moves or show excitement in your voice. Be patient and calm. Discussing the cause of the hostility may allow you to defuse the situation or provide you the opportunity to escape

Earthquake

Although the probability of an earthquake occurring is lower than most other emergency types, the potential for injuries and damage from one is high. It is essential that students and staff remain aware of the following basic actions:

If an earthquake or other situation warrants, drop to the floor, take protective position under desks or furniture with backs to windows and hands covering head and face. Stay in position until directed to evacuate or take other protective action.

If outside, move away from buildings and trees and take protective position. When situation permits, proceed to the designated assembly point. Standby: Alert students in your area to stand by for further information. Make whatever assessment of the situation is possible. Render emergency first aid as required.

If inside, stay inside during ground shaking. In classrooms or offices, move away from windows, shelves and heavy objects or furniture that may fall. Take cover under a safe table, desk or counter. At the teacher's command, students should take the DROP position.

If a "shelter" (table, desk, etc.) is not available, move to an inside wall or corner, turn away from windows, kneel alongside wall, and bend head close to knees, with elbows firmly behind neck protecting face.

If notebooks or jackets are handy, hold these overhead for added protection from flying glass and ceilings debris. Remain in sheltered position for at least 60 seconds or until directed to move by an adult.

If in halls, on stairways, or other areas where no cover is available, students must follow the directions of the nearest teacher or school employee.

If in the library, immediately move away from windows and bookshelves and take appropriate cover. In the science lab or shops, all burners should be extinguished (if possible) before taking cover. Stay clear of hazardous chemicals that may spill.

The duration of ground shaking depends on a number of factors, including the severity of the earthquake. Advise students to anticipate shorter or longer episodes of ground shaking during actual earthquakes and their aftershocks.

EARTHQUAKE HAZARDS COMMONLY FOUND IN SCHOOL BUILDINGS:

- Glass that shatters or flies around
- Objects stored above head-level on shelves, walls, and ceilings (such as unused projectors, books, science equipment, boxes)
- Objects that block movement to safe places (books on floors, tipped desks and bookcases)
- Cabinets without latches
- Objects stored on wheels
- Open shelving without a lip or restraining wire
- Free standing cabinets
- Blocked exits
- Objects in hallways that block movement (glass, tables, locker contents)

SETTLING DOWN AFTER THE FIRST SHOCK:

After the first shock, teachers will evacuate the classrooms, being alert to the possibility of aftershocks.

When leaving the classroom, teachers should make every effort to take with them the roll book and emergency supplies.

Announce that no student is to return to the room unless directed to do so.

Teachers will take classes to pre-arranged places on the campus.

Teachers and students will remain in designated areas until re-entry to the building has been approved or they are directed to move elsewhere.

School will remain open indefinitely until every student has been released to parents or to an authorized person.

Do not light any fires after the earthquake because of possible gas leaks.

If possible, notify utility companies of any break or suspected breaks in service.

The Incident Commander should procure the advice of the Director of Maintenance and Operations regarding the safety of the buildings.

The Incident Commander should keep the superintendent informed of conditions at the school.

Earthquake Emergency Procedure

STEP 1 - FEEL THE SHAKE OR HEAR A PA ANNOUNCEMENT

Inform students: "An earthquake drill has begun. It's time to drop, cover and hold on."

STEP 2 - DROP, COVER, & HOLD ON

1st - Drop to your knees and get under a sturdy desk or table.

2nd - Clasp hands behind neck and make body as small as possible

3rd - Cover face and ears with arms

STEP 3 - EVACUATE BUILDING

1st - Listen for evacuation announcement

2nd - Evacuate building SILENTLY by the route illustrated on the map to designated safety area

3rd - Line up and remain SILENT at designated safety area

4th - Take attendance and identify absent or unaccounted for students

STEP 4 - RETURN TO CLASS

Receive notification to return to class

Escort students back to class.

Explosion or Risk Of Explosion

Drop, Cover and Hold On is a self-protective action called for whenever there is immediate danger from flying objects and/or falling debris. Usually initiated in earthquakes, it is an appropriate response for a number of different threats, such as severe weather, explosions or shooter on campus.

The DROP command is to be given immediately in the event of an explosion at the school or within a school building.

If the explosion occurs within the building or threatens the building, the teacher will then implement the school evacuation plan.

Assemble at the designated assembly area.

Sound the fire alarm and proceed as above for a fire.

Notify the Director.

Fire in Surrounding Area

Evacuation

This emergency response activity is initiated when it is determined that it is not safe to remain in school buildings or to stay on campus. In this situation, students and staff are moved to a safer location either on or off site.

When to evacuate your school:

- Wildland/Urban Interface Fire

Evacuation Procedures

Remember to take your personal belongings with you (such as purses and car keys) when you evacuate

- On-site evacuation:

o Notify District Office

o Sound alarm

o Notify staff and students via:

An announcement over the PA: "Your attention please, your attention please. Due to the _____ students and staff should proceed immediately to the evacuation site"

OR

If it is safe to do so, send runners to each classroom with the above information. Be sure all classrooms, gymnasiums, and all other on-campus programs and offices are also notified.

o Classroom teachers are to make sure that emergency red folders are brought to the evacuation site

o When all classrooms have arrived at the evacuation site, have teachers take roll and determine if anyone is missing. Add names of guests/visitors

o Prepare for student release.

o Activate Parent Alert System (phone tree, if one is in place or other method)

- Off-Site Evacuation

o Notify District Office

o Activate Transportation Team

o Post sign in school office with directions to evacuation site along with any emergency numbers to call for additional information

o Sound alarm

o Notify staff and students via:

An announcement over the PA:

"Your attention please, your attention please. Students and staff should proceed immediately to the off-site evacuation staging area"

OR

If it is safe to do so, send runners to each classroom with the above information. Be sure all classrooms, gymnasiums, and all other on-campus programs and offices are also notified.

o Classroom teachers are to make sure that emergency red folders are brought to the evacuation site

o While waiting at the staging area or as students board buses, classroom teachers are to take roll and determine if anyone is missing. Missing students should be immediately reported to the Incident Command Post. Add names of guests/visitors that were in your classroom.

o Prepare for student release.

o Activate Parent Alert System (phone tree, if one is in place or other method)

OR Shelter in place

SMOKEY CONDITIONS

- Close doors and windows
- shut off HVAC

Fire on School Grounds

Fire Drills

1. The assistant director shall notify staff as to the schedule for fire drills. Fire drills will take place at least four times every school year. (Education Code 32001)
2. Whenever a fire drill is held, all students, teachers and other employees shall be directed to leave the building. (5 CCR 550)
3. Teachers shall ascertain that no student remains in the building.
4. Teachers shall be prepared to select alternate exits and shall direct their classes to these exits whenever the designated escape route is blocked.
5. The assistant director or designee shall keep a record of each fire drill conducted.

Fires

When a fire is discovered in any part of the school, the following actions shall be taken:

1. The assistant director or designee shall sound fire signals, unless the school and/or building is equipped with an automatic fire detection and alarm system. (Education Code 32001)
2. The assistant director or designee shall call 911.
3. All persons shall be directed to leave the building and shall proceed outside to designated assembly areas.
4. Staff shall give students clear direction and supervision and help maintain a calm and orderly response.
5. In outside assembly areas, teachers shall take roll, report missing students, and provide assistance to any injured students.
6. In outside assembly areas, the principal, designee and/or each department head shall account for their staff, report missing staff, and provide assistance to any injured staff.
7. If the fire is extensive, students shall be taken to an alternate location for protective custody until parents/guardians can pick them up or until they can be safely transported to their homes.

FIRE EVACUATION PROCEDURES

STEP 1 - HEAR FIRE ALARM / PA ANNOUNCEMENT / SMELL SMOKE OR FEEL HEAT

STEP 2 - EVACUATE BUILDING

- 1st - Line up to evacuate building
- 2nd - Evacuate building by designated map route
- 3rd - Line up in the location designated on map
- 4th - Take attendance and identify absent or unaccounted for students

STEP 3 RETURN TO CLASS

Receive notification to return to class and escort your students back to your classroom.

NOTE: STUDENTS WHO ARE OUTSIDE OF THE CLASSROOM MUST FOLLOW THE ADULT THEY ARE WITH OR JOIN THE CLASS THEY ARE NEAREST AND NOTIFY THAT TEACHER OF THEIR PRESENCE (I.E. THEY ARE IN THE BATHROOM)

Flooding

Evacuation

This emergency response activity is initiated when it is determined that it is not safe to remain in school buildings or to stay on campus. In this situation, students and staff are moved to a safer location either on or off site.

When to evacuate your school:

- Flood

Evacuation Procedures

Remember to take your personal belongings with you (such as purses and car keys) when you evacuate

- On-site evacuation:

o Sound alarm

o Notify staff and students via:

An announcement over the PA:

“Your attention please, your attention please. Due to the _____ students and staff should proceed immediately to the evacuation site”

OR If it is safe to do so, send runners to each classroom with the above information. Be sure all classrooms, gymnasiums, and all other on-campus programs and offices are also notified.

o Classroom teachers are to make sure that emergency red folders are brought to the evacuation site

o When all classrooms have arrived at the evacuation site, have teachers take roll and determine if anyone is missing. Add names of guests/visitors

o Prepare for student release.

o Activate Parent Alert System (phone tree, if one is in place or other method)

Loss or Failure Of Utilities

Should the school or surrounding area lose power, teachers should have alternative plans ready that do not utilize technology in an emergency. If

the power outage is not associated with a planned Public Safety Power Shutoff event, then the school will contact SDG&E to verify the reason and expected length of time for the power outage. If the outage issue is internal, then school personnel will work with the Facilities Manager to assess the issue and restore power.

Motor Vehicle Crash

Shelter-In-Place

When a hazardous substance such as a chemical, biological, or radiological contaminant is released into the environment, “Shelter-in-Place” is a common method of protecting students from exposure. While similar to a “Lockdown,” the critical difference between the responses is the shutdown of the air handling systems in a “Shelter-in-Place” response. In order to quickly implement the procedure, it is necessary that facility personnel be familiar with the location and operation of the heating, ventilation, and air conditioning (HVAC) system. Some of the information that should be gathered to prepare for this response include:

- Identify and record the location of all air intake vents, HVAC shutdown switches and access keys
- Identify and record the location of all other points where outside air can enter the building (e.g., ventilation grills, gaps under doors)
- Train team members (e.g., maintenance workers, custodians) who will be asked to respond

When to Shelter-In-Place:

- Explosion
- Hazardous Materials Incident
- Animal Disturbance
- Vehicle Crash

Shelter-In-Place Procedures

- Notify staff and students via: An announcement over the PA: “Your attention please, your attention please. Students and staff should immediately prepare to Shelter-In-Place and stand by for further instructions.

OR

- If it is safe to do so, send runners to each classroom with the above information. Be sure all classrooms, gymnasiums, and all other on-campus programs and offices are also notified.
- Order facilities manager or custodian to shut down air circulation system
- Turn on radio and monitor updates. Order staff to seal doors and vents if necessary.
- Activate Parent Alert System (phone tree, if one is in place or other method). Request that parents DO NOT come to school until safe to do so.
- Post signs on exterior windows, if there is time and it is safe to do so: “This school is sheltering-in-place. Do not attempt to enter any office or building”

Shelter-In-Place Preparations:

In classrooms and offices:

- Post “Shelter-In-Place” sign on exterior door or window, if safe to do so
- Shut doors and all windows, pull draperies or close blinds
- Seal doors and vents with plastic wrap and duct tape, if available and ordered to do so
- Take out class roster and take roll
- Wait for an announcement or communication of “all clear” before releasing anyone or opening doors and windows

In the gymnasium or theater:

- Move students and staff into a hallway or small room
- Shut doors and all windows, pull draperies or close blinds
- Seal doors and vents with plastic wrap and duct tape, if available and ordered to do so
- Write down names of everyone in the room or collect sign-in sheets
- Wait for an announcement or communication of “all clear” before releasing anyone or opening doors and windows

Outdoors:

- Move inside the nearest building
- Shut doors and all windows, pull draperies or close blinds
- Seal doors and vents with plastic wrap and duct tape, if available and ordered to do so
- Write down names of everyone in the room or collect sign-in sheets
- Wait for an announcement or communication of “all clear” before releasing anyone or opening doors and windows

Note : A request to “Shelter-In-Place” is usually of short duration (a few hours), so there is little danger that you will run out of oxygen or suffocate.

Pandemic

Pandemic flu is a worldwide outbreak of disease that occurs when a new flu virus appears that can spread from person to person. Because people have not been exposed to the new virus, they have little or no immunity. Therefore, serious illness or death is more likely to result. The illness rates for both seasonal and pandemic flu are high among children. Because schools are the most densely populated environments in society, they are likely to contribute significantly to the containment or to the spread of flu in the community. Therefore, school closures may result as a means of reducing the overall illness rates within communities.

Psychological Trauma

Innovations Academy has a psychologist and a Marriage and Family Therapist on staff who provide mental health support for the students. The psychologist and MFT meet with students affected and take steps to inform appropriate personnel. The school will always provide follow-up care to impacted students.

Suspected Contamination of Food or Water

Should Innovations Academy experience or be notified of suspected contamination of food or water then we will follow our Emergency Response Protocols and use evacuation procedures to release students to their parents/guardians. Innovations Academy will follow directives from the County Health Office and other local officials before allowing students back on campus.

Tactical Responses to Criminal Incidents

The Board recognizes that students and staff have the right to a safe and secure campus where they are free from physical and psychological harm. The Board is fully committed to maximizing school safety and to creating a positive learning environment that includes strategies for violence prevention and high expectations for student conduct, responsible behavior, and respect for others.

Unlawful Demonstration or Walkout

Innovations Academy would allow students to peacefully assemble. If students choose to walk off campus a member or members of school staff will accompany them to ensure their safety. Innovations Academy will notify the San Diego Police Department to help monitor and accompany the students to ensure their safety if they navigate through heavily trafficked areas.

Emergency Evacuation Map

Second Story

