

Innovations Academy Board Agenda: 3/11/25 @ 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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*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 o December 10, 2024	Vote to approve past minutes - 1st motion- 2nd motion- Vote:
Public comments (3 mins per person)	
Financial Items- Action ● 2nd Interim Report Approval	
Teacher presentation- Jen Franklin on Literacy Campaign	
Board Governance Items: ● Renew Stephen’s term as discussed at last meeting ● Set terms for all members ● Set roles for each board member: our board requires a Treasurer, Secretary and Board Chair. Per our bylaws, the	

<ul style="list-style-type: none"> ● Chair can not be secretary or treasurer ● Board Recruitment- Check in on board member community outreach for two people each 	
<p>Director Report (Christine)</p> <ul style="list-style-type: none"> ● Conflict of Interest Filing: Please submit the Form 700- it is a new system. It is due April 1st but don't wait. ● District Site Visit Follow Up <ul style="list-style-type: none"> ○ Inventory Clean Up ○ Expulsion Notice Template ○ Prop 28 Waiver ○ Reimbursement YMC contract and other finance items ○ Independent Study Policy ● Review of LCAP (Local Control Accountability Plan Midyear Report (see packet) ● Marketing update: An update on the activities and results of our marketing plan with Grow Schools 	<p><u>Item – Director Report</u> Discussion:</p>
<p>Action items:</p> <ul style="list-style-type: none"> ● Title IX Reversion to 2020 policy (see packet) ● IEE Policy Update Approval: Independent Education Evaluation Policy ● Expulsion Notice Approval ● CSMC Contract Renewal: A proposed 5 year contract. CSMC manages our back office including accounting, budget submission to district, county and state, CALPADS reporting, Powerschool management (see contract) ● School Accountability Report Card (SARC) is a yearly report that provides information about a school's performance. SARCs are required for all public schools in California, as well as some nonpublic schools. 	
<ul style="list-style-type: none"> ● Next board meeting 	
<ul style="list-style-type: none"> ○ Confirm date of next meeting 	
<ul style="list-style-type: none"> ○ Identify agenda items for next meeting 	➤
<p>Meeting adjourned</p>	

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;
 - If the Board of Directors elects to use teleconferencing, it shall post agendas at all teleconference locations with each teleconference location being identified in the notice and agenda of the meeting;
 - 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.
 - The Brown Act prohibits requiring members of the public, to provide their names as a condition of attendance at the meeting; however, those wishing to speak may be required to identify themselves.

Innovations Academy Board Agenda:12/10/24 @ 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

Stephen Rosen	Faraz Sharafi	Jennifer Williams	Julia Stoer	Danielle Strachman		
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Others in Attendance

Zoe Glover, teacher	Richard Farace, SDUSD	Christine Kuglen, Director				
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Agenda

Topic	Minutes
➤ Call to order / roll call	Time / Date 6:02 pm Board in Attendance Roll Call 1. Stephen, Faraz, Jennifer, Julia, Danielle Other Present: 1. RFarace, Zoe, Christine
➤ Approval of current agenda	Vote to approve current agenda - Motion made by: Jennifer Williams 2nd motion- Faraz Sharafi Roll Call Vote: Yes: Stephen, Julia, Faraz, Julia, Danielle No: 0 Abstain: 0
➤ Approval of prior month meeting minutes <ul style="list-style-type: none"> ○ October 17th meeting ○ November 1st meeting 	Vote to approve past minutes - Motion to approve minutes from both meetings made by Julia 2nd the motion- Jennifer Vote October Minutes: Yes: Stephen, Danielle, Jennifer, Julia No: 0 Abstain: Faraz due to his absence from the meeting Vote November Minutes Motion made by Stephen, 2nd by Jennifer Yes: Stephen, Jennifer, Julia No: 0

	Abstain: Danielle and Faraz due to absence from meeting
➤ Public comments (3 mins per person)	Steve asked for public comments. No public comments.
<p>Action Items</p> <ul style="list-style-type: none"> ➤ Financial Report (CSMC- Josh Eng) <ul style="list-style-type: none"> ○ Approval of Revised Budget ○ Approval of 1st Interim 	<p>Josh walked the board through the budget starting with the preliminary budget. This budget is a revision. The differences are that the ADA dropped. We lost revenue due to loss of students. Due to that loss we altered the budget. Due to an increase in special education student numbers there was an increase in personnel. Ballpark loss of \$98,000. ERC funds were factored in. We have received the first of 2 or 3 disbursements.</p> <p>Faraz asked about the percentage of the reserves that are being consumed by this budget loss. Josh responded that our reserves are at 3,900,00 which is 2.6%</p> <p>Vote on Revised Budget</p> <p>Motion to approve the revised budget: Faraz 2nd the motion- Stephen</p> <p>Vote: Yes: Stephen, Julia, Jennifer, Faraz, Danielle No: 0 Abstain 0</p> <p>Vote First Interim</p> <p>This interim budget is one that the authorizer (SDUSD) requests we submit on their template and then it gets sent to the County. Josh refers to page 20 and addresses the main points of page 22 (revenue sources and expenditures), refers the board to the summary of the budget.</p> <p>Stephen notes that the page 24 changes for increased access to certain revenues. Josh explains the reasoning for accessing the funds now to balance the budget.</p> <p>Jen asked about why there were payroll numbers that were moved. Josh explained about the reclassification of personnel costs.</p> <p>Operations costs also changed which include utilities- Faraz question</p> <p>Motion to approve the first interim made by Faraz, Second made by Danielle</p> <p>Vote: Yes: Stephen, Julia, Jennifer, Faraz, Danielle No: 0 Abstain: 0</p>
<ul style="list-style-type: none"> ➤ Teacher Presentation (Zoe) <ul style="list-style-type: none"> ○ New report card format 	<p><u>Item – Teacher Presentation</u></p> <p>Discussion: Zoe introduces herself. 6th grade teacher this year and 3rd year at IA. She summarizes that she is talking about grading and report cards.</p> <p>IA went to a 1 point rubric point system for report cards. One way to remove subjectivity is with points on a rubric. This is also a way to get everyone on the same page throughout the grade levels and remove subjectivity. .</p> <p>All work is included in the portfolio which allows parents to see the work that their child is doing and how it is tied to the report card.</p>

	<p>There was a discussion about the difference between grading on a curve and using portfolios and one point rubrics.</p> <p>Faraz asked about the rubrics. Zoe explained that the rubrics are across the entire school and all subjects but each grade level is making their own rubric. Faraz points out that rubrics made in isolation can often be choppy. Can rubrics be designed holistically? Zoe mentioned that our math curriculum and the RACE structure in writing are consistent across grade levels. But not all learning will be consistent across grade levels because standards are different.</p> <p>Faraz recommends looking at all subjects holistically. He also realizes that we should find a way to give a short summary of the child to make sure that parents are not given too much information. Faraz gave a soccer analogy in that different kids can be good soccer players even if they only have the skills of one position or area of the field. How can we make sure that this is reflected in report cards.</p> <p>Zoe recognized that this is new for us. She also recognized that report cards are not going to reflect everything. Seeing grades, seeing portfolios, attending Student Teacher conferences, attending Exhibition will give the parent different information.</p> <p>Zoe was thanked for her time in presenting.</p>
<p>➤ Parent Advisory/Parent Connection Presentation (Jackie Silacci)</p>	<p><u>Item – Parent Presentation</u> Discussion: Jackie Silacci is the lead of Parent Connection and her child is in Zoe’s 6th grade. PC sees itself as a bridge and support for communication, raises funds and involves families in social interaction. One of the main tasks is room parent support and helping teachers find one. Then training the room parents as needed. They also get volunteers in different areas. PC involvement is waning. Tried in person and on phone but both groups are small. Stephen recommends involving ZOOM so that more people can participate. Jackie mentions that PC meetings involve both phone and in person. A discussion ensued about challenges with participation and communication Christine will reach out to ParentSquare to find out if we can see when parents read or view on app of PS.</p>
<p>➤ Director Presentation</p> <ul style="list-style-type: none"> ○ Current Enrollment Update <ul style="list-style-type: none"> ■ Enrollment is slowly climbing(see report) ○ Special Education Christine is pursuing support from the SELPA for growing numbers of special ed students ○ ERC Report The first portion was approved for \$145,562.88 	<p>Christine spoke about each item.</p> <p>Enrollment is creeping up. We are enrolling new students that will start in January. At least four students will enroll.</p> <p>Special education numbers are rising. This is consistent for schools but charters are unique in that they don’t have access to special programs, especially for moderate to severe students. This leaves us at a disadvantage for providing classrooms that are not dominated by special</p>

<ul style="list-style-type: none"> ○ Marketing Update GrowSchools has begun their work ○ Brown Act Training Christine will share the link for board members who need to complete. 	<p>education needs and financially impacts us. Stephen gave the ERC report. He had completed the forms and has overseen the process. IA received the first check. Stephen was thanked for his contribution to making this happen.</p> <p>GrowSchools was the company chosen by the board. They have begun. They are creating blogs and social media posts. They have sent a photographer to capture effective outreach images. They are tracking responses and working closely with our staff in weekly meetings. Board members need to take Brown Act training.</p>
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Board Discussion/Action items	
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<p>➤ Board Members POSSIBLE ACTION ITEM</p> <ul style="list-style-type: none"> ○ Audit Review and Approval Board will review the most recent audit and discuss next steps <p>DISCUSSION ITEMS.</p> <ul style="list-style-type: none"> ○ Potential new board member(Stephen) Stephen will share about a possible new member. ○ District Site Visit Report (Stephen and Julia) Board will discuss the site visit that took place on 11/19 and feedback will be reported to the board. ○ Review Board Terms Board will review member terms and discuss terms for current members. ○ Director Succession Last meeting the board began discussing procedures and administrative structure with regards to eventual director succession. Board will continue the discussion as needed. ○ Board Calendar Creation The board will set meeting dates for the rest of the current school year and the start of the 2025-26 school year. 	<p>The board accepts the audit A finding regarding signatures of students on independent study forms was made. Christine is waiting for next steps to remedy that finding.</p> <p>Stephen worked on the Crystal Trull District A election campaign. She lost by only 1000 votes. At the thank you party, Stephen approached her about being on our board. This would give her a chance to be involved on a school board. She has a PhD in education and works with governance. Danielle has a list of potential candidates that she will reach out to this month. Julia is working on the teacher candidate.</p> <p>District Site Visit: What are our focus areas: Director succession, marketing for enrollment, board expansion, charter renewal We are in the high tier so we are in the range of a 5, 6, 7 year renewal. District brought up cleaning up our inventory so that Prop Funded items are separate from school funded items. Expulsion notice template needs to be put in Epicenter. Background checks for independent contractors- we must have access (we do) Prop 28 Music funding- we can pursue a waiver for this and can be put toward STEM as well. Reimbursement- YMC contract All of the finance items will be in an email from the district. Independent Study policy needs to be changed so that it doesn't say go to the district. Our team asked about the process for charter renewal. Submit, 30 day public hearing, 15 days staff report recommendation.</p> <p>Board Terms Stephen is the President Julia is the secretary Jen is the Treasurer At the next meeting, the board will have to vote on</p>
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	<p>Stephen's term.</p> <p>Director Succession Christine will stay on until we are comfortable Director position vs Operational position. The Director would be the captain of the ship and support teachers and students and instruction. The operational person would not Julia mentions that Clara's job as Title 1 and EL could be partially moved to the Operational Person and free up that person to deal with student behavior. Maybe Clara's position</p> <p>Board Calendar Creation February 11th 6 pm March 11th at 6 pm May 13th 6m June 17th 6 pm</p>
➤ Next board meeting	
○ Confirm date of next meeting	Feb 11th
○ Identify agenda items for next meeting	<p>Tracking the corrections from the District Site Visit Stephen will need his term and review the conflicts of the</p> <p>Also, take a look at our personal home addresses on the State form 700 Midyear LCAP</p>
Meeting adjourned	adjourned at 8:37 pm

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

Secretary

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Innovations Academy
Board Narrative
March 11, 2025

Approval of 2nd Interim Report

The 2nd interim is a report sent to the district to show them your latest budget as well as what your actual data is from the period of July 1, 2024 to January 31, 2025. Please see the attached labeled "37683380118083 Innovations".

The primary thing to note is that the school is not proposing a new budget. The latest board approved budget, budgets for a loss of <\$99K>. The template shows that the budget is relatively inline expense-wise, and if the budgeted revenues work out (i.e. all budgeted restricted funds can find appropriate expenses and P2 ADA comes in at 410), the budget should still be appropriate. This information is presented on the "Interim Input" tab in the attachment in column E "Total Budget". The number is the latest projection rather than the last board approved budget per the district's request.

Also to note, on the attachment on the "Interim Input" tab in column F "Total Actuals through 1/31/25", is the current total loss for the noted period of <\$363K>. Though this is different from the budgeted number and budgeted projection (the number to the left), if the notes mentioned for the budget in the previous paragraph occur, then the budgeted amount should be the more accurate amount come year end.

The 2nd Interim requires board approval thus acknowledging the board's overview, and will be submitted to the district, on their respective template.

Charter School Second Interim Report

FY 2024-2025

For the Period July 1, 2024 through January 31, 2025

Accrual Basis

Financial Accounting Department

Charter Schools Accounting Office

Authorizing Agency Contact: Theresa Goody (tgoody@sandi.net)

Authorizing Agency Contact: Nadine Creer (ncreer@sandi.net)

Charter School Name:	Innovations Academy
CDS #:	37-68338-0118083
Charter Approving Entity:	San Diego Unified School District
County:	San Diego
SBE Charter #:	1024

Has board approved a revised budget? (check box below)

Yes. (Enter board approved revised budget)

Revised Date: 12/10/2024

No. (Enter budget forecast)

Description	Object Code					(A + C)	(B + D)	(E + H)	(G - E)
		Unrestricted Budget	Unrestricted Actuals through 01/31/25	Restricted Budget	Restricted Actuals through 01/31/25	E	F	G	H
A. REVENUES (8000-8799)									
1. Local Control Funding Formula (LCFF) Sources - (8011-8097)									
LCFF State Aid - Current Year (CY) (Res 0000)	8011	752,828	422,639			752,828	422,639	752,828	-
Education Protection Account State Aid (EPA) - CY (Res 1400)	8012	81,968	41,685			81,968	41,685	81,968	-
State Aid - Prior Years (LCFF State Aid and EPA) (Res 0000 and Res 1400)	8019					-	-	-	-
Transfers to Charter Schools In Lieu of Property Taxes - CY & PY (Res 0000)	8096	3,760,512	1,912,418			3,760,512	1,912,418	3,760,512	-
Other LCFF Transfers	8091, 8097					-	-	-	-
Total, LCFF Sources		4,595,308	2,376,742	-	-	4,595,308	2,376,742	4,595,308	-
2. Federal Revenues (8100-8299)									
ESEA (ESSA): Title I, Part A, Basic Grants Low-Income and Neglected (Res 3010)	8290			43,626	43,626	43,626	43,626	43,626	-
ESEA (ESSA): Title II, Part A, Supporting Effective Instruction Local Grants (Res 4035)	8290			7,432	4,062	7,432	4,062	7,432	-
ESEA (ESSA): Title III, English Learner Student Program (Res 4203)	8290					-	-	-	-
ESEA (ESSA): Title III, Immigrant Student Program (Res 4201)	8290					-	-	-	-
ESEA (ESSA): Title IV, Part B, 21st Century Community Learning Centers Program (Res 4124)	8290					-	-	-	-
ESEA (ESSA) Title IV, Part A, Student Support and Academic Enrichment Grants (Res 4127)	8290			10,000	8,810	10,000	8,810	10,000	-
ESSA: Title IV, Part C, Public Charter Schools Grant Program (Res 4610)	8290					-	-	-	-
Special Ed: IDEA Basic Local Assistance Entitlement, Part B, Sec 611 (Res 3310)	8181			65,984		65,984	-	65,984	-
Special Ed: IDEA Mental Health Allocation Plan, Part B, Sec 611 (Res 3327)	8182					-	-	-	-
Child Nutrition - Federal (NSLP) (Res 5310 and others)	8220			40,000	15,218	40,000	15,218	40,000	-
Maintenance and Operations (Public Law 81-874) (Res 0000)	8110					-	-	-	-
Other Federal Revenues (All other resources not reported separately)	8100-8299	150,000	145,563			150,000	145,563	150,000	-
Total - Federal Revenues		150,000	145,563	167,042	71,716	317,042	217,279	317,042	-
3. Other State Revenues (8300-8599)									
State Special Education (Res 6500)	8792			363,528	204,024	363,528	204,024	363,528	-
State Special Education Mental Health Services (Res 6512)	8590					-	-	-	-
Mandate Block Grant (Res 0000)	8550	8,362	8,362			8,362	8,362	8,362	-
After School Education and Safety (ASES) (Res 6010)	8677, 8590					-	-	-	-
Common Core Standards Implementation (Res 7405)	8590					-	-	-	-
Charter School Facility Grant Program (SB 740) (Res 6030)	8590					-	-	-	-
COVID-19 LEA Response Funds (SB 117) (Res 7388)	8590					-	-	-	-
Lottery, Unrestricted (Res 1100)	8560	72,542	26,954			72,542	26,954	72,542	-
Lottery, Restricted - Prop 20 (Res 6300)	8560			29,508	3,954	29,508	3,954	29,508	-
Proposition 39 - California Clean Energy Jobs Act (Res 6230)	8590					-	-	-	-
Other State Revenues (All other resources not reported separately)	8300-8599		1,481	975,343	293,413	975,343	294,893	975,343	-
Total - Other State Revenues		80,904	36,797	1,368,380	501,391	1,449,283	538,188	1,449,283	-
4. Local Revenue (8600-8799)									
All Local Revenues	8600-8799	220,029	133,971			220,029	133,971	220,029	-
Total - Local Revenues		220,029	133,971	-	-	220,029	133,971	220,029	-
5. TOTAL REVENUES		5,046,241	2,693,073	1,535,422	573,107	6,581,662	3,266,180	6,581,662	-
B. EXPENDITURES AND OTHER OUTGO (1000-7499)									
1. Certificated Salaries									
Teachers' Salaries	1100	1,523,946	952,308	600,000	280,910	2,123,946	1,233,219	2,123,946	-
Pupil Support Salaries	1200	57,000	31,429	100,000	55,358	157,000	86,787	157,000	-
Supervisors' and Administrators' Salaries	1300	237,000	138,250			237,000	138,250	237,000	-
Other Certificated Salaries	1900	-	-	107,886	43,357	107,886	43,357	107,886	-
Total, Certificated Salaries		1,817,946	1,121,987	807,886	379,625	2,625,832	1,501,612	2,625,832	-

Charter School Second Interim Report

Charter School Name: Innovations Academy
 CDS #: 37-68338-0118083
 Charter Approving Entity: San Diego Unified School District
 County: San Diego
 SBE Charter #: 1024

FY 2024-2025
 For the Period July 1, 2024 through January 31, 2025
 Accrual Basis

Financial Accounting Department
 Charter Schools Accounting Office
 Authorizing Agency Contact: Theresa Goody (tgoody@sandi.net)
 Authorizing Agency Contact: Nadine Creer (ncreer@sandi.net)

Has board approved a revised budget? (check box below)
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Revised Date: 12/10/2024

No. (Enter budget forecast)

Description	Object Code					(A + C)	(B + D)	(E + H)	(G - E)
		A	B	C	D	E	F	G	H
		Unrestricted Budget	Unrestricted Actuals through 01/31/25	Restricted Budget	Restricted Actuals through 01/31/25	Total Budget	Total Actuals through 01/31/25	Projected EFB/NP (Higher of Budget or Actual)	Amount over Budget
2. Classified Salaries									
Instructional Salaries	2100	295,425	162,389	110,000	56,543	405,425	218,932	405,425	-
Support Salaries	2200	224,150	150,807	100,000	42,000	324,150	192,807	324,150	-
Supervisors' and Administrators' Salaries	2300								-
Clerical and Office Salaries	2400	170,154	100,976			170,154	100,976	170,154	-
Other Classified Salaries	2900	-		29,393	14,612	29,393	14,612	29,393	-
Total, Classified Salaries		689,729	414,173	239,393	113,155	929,122	527,327	929,122	-
3. Employee Benefits									
STRS	3101-3102	414,106	212,580	120,000	68,661	534,106	281,241	534,106	-
PERS	3201-3202								-
OASDI/Medicare (Social Security)	3301-3302	82,792	47,112	30,000	14,066	112,792	61,178	112,792	-
Health and Welfare Benefits	3401-3402	274,001	162,963	100,000	58,081	374,001	221,044	374,001	-
Unemployment Insurance	3501-3502	28,918	6,490	1,500	2,185	30,418	8,675	30,418	-
Workers' Compensation Insurance	3601-3602	39,437	9,136	6,000	2,946	45,437	12,082	45,437	-
OPEB, Allocated	3701-3702								-
OPEB, Active Employees	3751-3752								-
Other Employee Benefits	3901-3902								-
Total, Employee Benefits		839,254	438,281	257,500	145,938	1,096,754	584,219	1,096,754	-
4. Books and Supplies									
Approved Textbooks and Core Curricula Materials	4100	9,915	10,940	2,000	975	11,915	11,915	11,915	-
Books and Other Reference Materials	4200	5,000	2,188	2,000	2,595	7,000	4,784	7,000	-
Materials and Supplies	4300	75,456	36,921	15,000	11,313	90,456	48,235	90,456	-
Non-capitalized Equipment	4400	90,042	77,951	30,000	15,505	120,042	93,455	120,042	-
Food (Food used in food-service activities for which the purpose is nutrition)	4700			110,000	45,030	110,000	45,030	110,000	-
Total, Books and Supplies		180,413	128,000	159,000	75,418	339,413	203,418	339,413	-
5. Services and Other Operating Expenditures									
Subagreements for Services	5100		38,936	198,967	15,631	198,967	54,567	198,967	-
Travel and Conferences	5200	9,000	5,599	22,000	22,923	31,000	28,522	31,000	-
Dues and Memberships	5300	12,000	9,330			12,000	9,330	12,000	-
Insurance	5400	75,000	60,517			75,000	60,517	75,000	-
Operations and Housekeeping Services	5500	345,000	127,859			345,000	127,859	345,000	-
Rentals,Leases,Repairs,and Noncapitalized Improvements	5600	80,620	50,352	5,000	1,053	85,620	51,404	85,620	-
Transfer of Direct Costs (MUST net to zero)	5700								-
Prof/Consulting Svcs and Operating Expend (Include District Oversight)	5800	562,609	321,265	250,000	140,862	812,609	462,127	812,609	-
Communications	5900	32,000	18,521			32,000	18,521	32,000	-
Total, Services and Other Operating Expenditures		1,116,229	632,379	475,967	180,469	1,592,196	812,847	1,592,196	-
6. Capital Outlay									
Depreciation Expense (See Sections G.9 & F.2.a)	6900	90,000				90,000		90,000	-
Total, Capital Outlay		90,000	-	-	-	90,000	-	90,000	-
7. Other Outgo									
Tuition to Other Schools (<i>Include contribution to unfunded cost of Sp Ed.</i>)	7110-7143								-
Transfers of Pass-Through Revenues to Other LEAs	7211-7213								-
Transfers of Apportionments to Other LEAs - Spec Ed and All Others	7221-7223								-
All Other Transfers	7280-7299								-
Transfers of Indirect Costs (MUST net to zero)	7300-7399								-
Debt Service - Interest	7430-7439								-
Debt Service - Principal (FOR MODIFIED ACCRUAL BASIS ONLY)	7439								-
Total, Other Outgo		-	-	-	-	-	-	-	-
8. TOTAL EXPENDITURES		4,733,571	2,734,820	1,939,746	894,604	6,673,317	3,629,424	6,673,317	-
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPEND.									
BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)		312,670	(41,747)	(404,324)	(321,497)	(91,655)	(363,244)	(91,655)	

Charter School Second Interim Report

FY 2024-2025

For the Period July 1, 2024 through January 31, 2025

Accrual Basis

Financial Accounting Department

Charter Schools Accounting Office

Authorizing Agency Contact: Theresa Goody (tgoody@sandi.net)

Authorizing Agency Contact: Nadine Creer (ncreer@sandi.net)

Charter School Name:	Innovations Academy
CDS #:	37-68338-0118083
Charter Approving Entity:	San Diego Unified School District
County:	San Diego
SBE Charter #:	1024

Has board approved a revised budget? (check box below)

Yes. (Enter board approved revised budget)

Revised Date: 12/10/2024

No. (Enter budget forecast)

Description	Object Code					(A + C)	(B + D)	(E + H)	(G - E)
		A	B	C	D	E	F	G	H
		Unrestricted Budget	Unrestricted Actuals through 01/31/25	Restricted Budget	Restricted Actuals through 01/31/25	Total Budget	Total Actuals through 01/31/25	Projected EFB/NP (Higher of Budget or Actual)	Amount over Budget
D. OTHER FINANCING SOURCES/USES (7600-7699, 8930-8999)									
1. All Other Financing Sources	8930-8979					-	-	-	
2. Other Uses	7630-7699					-	-	-	
3. Contributions between unrestricted and restricted accounts (<i>MUST net to zero</i>) (<i>Include contribution to the unfunded cost of Special Education</i>)	8980-8999	(404,324)	(321,497)	404,324	321,497	-	-	-	
4. TOTAL OTHER FINANCING SOURCES/USES		(404,324)	(321,497)	404,324	321,497	-	-	-	
E. NET INCREASE (DECREASE) IN FUND BALANCE/NET POSITION (C + D.4.)		(91,654)	(363,244)	(0)	0	(91,655)	(363,244)	(91,655)	
F. FUND BALANCE/NET POSITION (Budget and Actuals <i>MUST</i> match) (F.1.a-b)									
1. Beginning Fund Balance/Net Position									
a. July 1 (<i>MUST</i> match EFB/Net Position of PY Unaudited Actuals, Section F.2)	9791	3,923,234	3,923,234			3,923,234	3,923,234	3,923,234	
b. Adjustments/Restatements	9793, 9795	33,348	33,348	-		33,348	33,348	33,348	
c. Adjusted Beginning Fund Balance/Net Position		3,956,582	3,956,582	-		3,956,582	3,956,582	3,956,582	
2. Projected Ending Fund Balance/Net Position, June 30 (E + F.1.c.)	See cell M128	3,864,927	3,593,337	(0)	0	3,864,927	3,593,338	3,864,927	
Components of Ending Net Position									
a. Net Investment in Capital Assets (<i>See Sections B.6 and G.9</i>)	9796		226,983				226,983		
b. Restricted Net Position	9797				0		0		
c. Unrestricted Net Position	9791		3,366,355				3,366,355		
G. ASSETS									
1. Cash									
In County Treasury	9110		2,919,263				2,919,263		
Fair Value Adjustment to Cash in County Treasury	9111		(50,118)				(50,118)		
In Banks	9120		729,980		846,580		1,576,560		
In Revolving Fund	9130						-		
With Fiscal Agent/Trustee	9135						-		
Collections Awaiting Deposit	9140						-		
2. Investments	9150						-		
3. Accounts Receivable	9200						-		
4. Due From Grantor Government	9290		25,398				25,398		
5. Due From Other Funds	9310						-		
6. Stores	9320						-		
7. Prepaid Expenditures (Expenses)	9330		7,458				7,458		
8. Other Current Assets	9340						-		
9. Lease Receivable	9380						-		
10. Capital Assets (<i>See Sections B.6 & F.2.a</i>)	9400-9489		226,983				226,983		
11. Total Assets			3,858,965		846,580		4,705,545		
H. DEFERRED OUTFLOWS OF RESOURCES									
1. Deferred Outflows of Resources	9490						-		
2. Total Deferred Outflows							-		

Charter School Second Interim Report

Charter School Name: **Innovations Academy**
 CDS #: **37-68338-0118083**
 Charter Approving Entity: **San Diego Unified School District**
 County: **San Diego**
 SBE Charter #: **1024**

FY 2024-2025
 For the Period July 1, 2024 through January 31, 2025
 Accrual Basis

Financial Accounting Department
 Charter Schools Accounting Office
 Authorizing Agency Contact: Theresa Goody (tgoody@sandi.net)
 Authorizing Agency Contact: Nadine Creer (ncreer@sandi.net)

Has board approved a revised budget? (check box below)

Yes. (Enter board approved revised budget)

Revised Date: **12/10/2024**

No. (Enter budget forecast)

Description	Object Code	A	B	C	D	(A+C) E	(B+D) F	(E+H) G	(G-E) H
		Unrestricted Budget	Unrestricted Actuals through 01/31/25	Restricted Budget	Restricted Actuals through 01/31/25	Total Budget	Total Actuals through 01/31/25	Projected EFB/NP (Higher of Budget or Actual)	Amount over Budget
I. LIABILITIES									
1. Accounts Payable	9500		182,058				182,058		
2. Due to Grantor Government	9590				59,373		59,373		
3. Due to Other Funds	9610						-		
4. Current Loans	9640						-		
5. Deferred Revenue	9650				787,207		787,207		
6. Long-term Liabilities	9660-9669		83,568				83,568		
7. Total Liabilities			265,627		846,580		1,112,207		
J. DEFERRED INFLOWS OF RESOURCES									
1. Deferred Inflows of Resources	9690						-		
2. Total Deferred inflows of Resources			-		-		-		
K. ENDING FUND BALANCE/NET POSITION, January 31, 2025									
1. Ending Fund Balance/Net Position (Sections G.11+H.2-1.7-1.2)			3,593,338		0		3,593,338		
<i>(MUST agree with F.2)</i>									

BUDGET VARIANCE ANALYSIS
2nd Interim Budget vs Preliminary Budget
FY 2024-25

Instructions:

Column G "Preliminary Budget" - manual input (data source: Budget submitted in June 2024)
 Column H "1st Interim Budget" - will automatically populate (linked to Interim Input tab)
 Column I "\$ Difference" - will automatically populate
 Column J "% Change" - will automatically populate
 Column K "Explanation" - provide an explanation if Column J is highlighted in RED

Charter School Name:	Innovations Academy
CDS #:	37-68338-0118083
Charter Approving Entity:	San Diego Unified School District
County:	San Diego
SBE Charter #:	1024

Description	Object Code	Preliminary Budget (A)	Revised 2nd Interim Budget (B)	2nd Interim Budget vs Preliminary Budget Favorable / (Unfavorable)		Explanation of Change <i>(e.g. enrollment increase from 350 students to 280.; one-time purchase of 100 chrome books, etc.)</i> =>10% and =>(-10%)
				\$ Difference (Col B & A) (C)	% Change (C/A) (D)	
A. REVENUES (8000-8799)						
1. Local Control Funding Formula (LCFF) Sources - (8011-8097)						
LCFF State Aid - Current Year (CY) (Res 0000)	8011	862,410	752,828	(109,582)	-13%	Decrease in ADA.
Education Protection Account State Aid (EPA) - CY (Res 1400)	8012	85,540	81,968	(3,572)	-4%	
State Aid - Prior Years (LCFF State Aid and EPA) (Res 0000 and Res 1400)	8019	-	-	-	0%	
Transfers to Charter Schools In Lieu of Property Taxes - CY & PY (Res 0000)	8096	3,878,636	3,760,512	(118,124)	-3%	
Other LCFF Transfers	8091, 8097	-	-	-	0%	
Total, LCFF Sources		4,826,586	4,595,308	(231,278)	-5%	
2. Federal Revenues (8100-8299)						
ESEA (ESSA): Title I, Part A, Basic Grants Low-Income and Neglected (Res 3010)	8290	33,392	43,626	10,234	31%	Increase allocation.
ESEA (ESSA): Title II, Part A, Supporting Effective Instruction Local Grants (Res 4035)	8290	7,432	7,432	-	0%	
ESEA (ESSA) : Title III, English Learner Student Program (Res 4203)	8290	-	-	-	0%	
ESEA (ESSA) : Title III, Immigrant Student Program (Res 4201)	8290	-	-	-	0%	
ESEA (ESSA): Title IV, Part B, 21st Century Community Learning Centers Program (Res 4124)	8290	-	-	-	0%	
ESEA (ESSA) Title IV, Part A, Student Support and Academic Enrichment Grants (Res 4127)	8290	10,000	10,000	-	0%	
ESSA: Title IV, Part C, Public Charter Schools Grant Program (Res 4610)	8290	-	-	-	0%	
Special Ed: IDEA Basic Local Assistance Entitlement, Part B, Sec 611 (Res 3310)	8181	72,800	65,984	(6,816)	-9%	
Special Ed: IDEA Mental Health Allocation Plan, Part B, Sec 611 (Res 3327)	8182	-	-	-	0%	
Child Nutrition - Federal (NSLP) (Res 5310 and others)	8220	40,000	40,000	-	0%	
Maintenance and Operations (Public Law 81-874) (Res 0000)	8110	-	-	-	0%	
Other Federal Revenues (All other resources not reported separately)	8100-8299	-	150,000	150,000	0%	
Total - Federal Revenues		163,624	317,042	153,418	94%	
3. Other State Revenues (8300-8599)						
State Special Education (Res 6500)	8792	361,656	363,528	1,872	1%	Increase use in respective restricted funds.
State Special Education Mental Health Services (Res 6512)	8590	33,788	-	(33,788)	-100%	
Mandate Block Grant (Res 0000)	8550	8,554	8,362	(192)	-2%	
After School Education and Safety (ASES) (Res 6010)	8677, 8590	-	-	-	0%	
Common Core Standards Implementation (Res 7405)	8590	-	-	-	0%	
Charter School Facility Grant Program (SB 740) (Res 6030)	8590	-	-	-	0%	
COVID-19 LEA Response Funds (SB 117) (Res 7388)	8590	-	-	-	0%	
Lottery, Unrestricted (Res 1100)	8560	75,703	72,542	(3,161)	-4%	
Lottery, Restricted - Prop 20 (Res 6300)	8560	30,794	29,508	(1,286)	-4%	
Proposition 39 - California Clean Energy Jobs Act (Res 6230)	8590	-	-	-	0%	
Other State Revenues (All other resources not reported separately)	8300-8599	641,967	975,343	333,376	52%	
Total - Other State Revenues		1,152,462	1,449,283	296,821	26%	
4. Local Revenue (8600-8799)						
All Local Revenues	8600-8799	160,000	220,029	60,029	38%	Increase in budgeted interest revenue.
Total - Local Revenues		160,000	220,029	60,029	38%	
5. TOTAL REVENUES		6,302,672	6,581,662	278,990		
B. EXPENDITURES AND OTHER OUTGO (1000-7499)						
1. Certificated Salaries						
Teachers' Salaries	1100	2,484,583	2,123,946	(360,637)	-15%	Offset with expenses that are being charged in other categories.
Pupil Support Salaries	1200	70,000	157,000	87,000	124%	
Supervisors' and Administrators' Salaries	1300	237,000	237,000	-	0%	Offset with expenses that are being charged in other categories.
Other Certificated Salaries	1900	30,780	107,886	77,106	251%	
Total, Certificated Salaries		2,822,363	2,625,832	(196,531)	-7%	
2. Classified Salaries						
Instructional Salaries	2100	248,710	405,425	156,715	63%	Due to increase need for aids.
Support Salaries	2200	140,483	324,150	183,667	131%	
Supervisors' and Administrators' Salaries	2300	-	-	-	0%	Offset with expenses that are being charged in other categories.
Clerical and Office Salaries	2400	169,024	170,154	1,130	1%	
Other Classified Salaries	2900	-	29,393	29,393	0%	
Total, Classified Salaries		558,217	929,122	370,905	66%	

BUDGET VARIANCE ANALYSIS
2nd Interim Budget vs Preliminary Budget
FY 2024-25

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Charter School Name:	Innovations Academy
CDS #:	37-68338-0118083
Charter Approving Entity:	San Diego Unified School District
County:	San Diego
SBE Charter #:	1024

Description	Object Code	Preliminary Budget (A)	Revised 2nd Interim Budget (B)	2nd Interim Budget vs Preliminary Budget Favorable / (Unfavorable)		Explanation of Change <i>(e.g. enrollment increase from 350 students to 280.; one-time purchase of 100 chrome books, etc.)</i> =>10% and =>(-10%)
				\$ Difference (Col B & A) (C)	% Change (C/A) (D)	
3. Employee Benefits						
STRS	3101-3102	539,071	534,106	(4,965)	-1%	
PERS	3201-3202		-	-	0%	
OASDI/Medicare (Social Security)	3301-3302	83,627	112,792	29,165	35%	Due to items noted above.
Health and Welfare Benefits	3401-3402	348,500	374,001	25,501	7%	
Unemployment Insurance	3501-3502	23,940	30,418	6,478	27%	Due to items noted above.
Workers' Compensation Insurance	3601-3602	41,581	45,437	3,856	9%	
OPEB, Allocated	3701-3702		-	-	0%	
OPEB, Active Employees	3751-3752		-	-	0%	
Other Employee Benefits	3901-3902		-	-	0%	
Total, Employee Benefits		1,036,719	1,096,754	60,035	6%	
4. Books and Supplies						
Approved Textbooks and Core Curricula Materials	4100	30,000	11,915	(18,085)	-60%	Adjusted for new needs.
Books and Other Reference Materials	4200	12,000	7,000	(5,000)	-42%	Adjusted for new needs.
Materials and Supplies	4300	95,456	90,456	(5,000)	-5%	
Non-capitalized Equipment	4400	115,000	120,042	5,042	4%	
Food (Food used in food-service activities for which the purpose is nutrition)	4700	110,000	110,000	-	0%	
Total, Books and Supplies		362,456	339,413	(23,043)	-6%	
5. Services and Other Operating Expenditures						
Subagreements for Services	5100	198,967	198,967	-	0%	
Travel and Conferences	5200	42,091	31,000	(11,091)	-26%	Adjusted for new needs.
Dues and Memberships	5300	12,000	12,000	-	0%	
Insurance	5400	75,000	75,000	-	0%	
Operations and Housekeeping Services	5500	280,000	345,000	65,000	23%	Adjusted for new needs.
Rentals,Leases,Repairs,and Noncapitalized Improvements	5600	85,620	85,620	-	0%	
Transfer of Direct Costs (MUST net to zero)	5700		-	-	0%	
Prof/Consulting Svcs and Operating Expend (Include District Oversight)	5800	703,878	812,609	108,731	15%	Adjusted for new needs.
Communications	5900	32,000	32,000	-	0%	
Total, Services and Other Operating Expenditures		1,429,556	1,592,196	162,640	11%	
6. Capital Outlay						
Depreciation Expense (See Sections G.9 & F.2.a)	6900	90,000	90,000	-	0%	
Total, Capital Outlay		90,000	90,000	-	0%	
7. Other Outgo						
Tuition to Other Schools (<i>Include contribution to unfunded cost of Sp Ed.</i>)	7110-7143		-	-	0%	
Transfers of Pass-Through Revenues to Other LEAs	7211-7213		-	-	0%	
Transfers of Apportionments to Other LEAs - Spec Ed and All Others	7221-7223		-	-	0%	
All Other Transfers	7280-7299		-	-	0%	
Transfers of Indirect Costs (MUST net to zero)	7300-7399		-	-	0%	
Debt Service - Interest	7430-7439		-	-	0%	
Debt Service - Principal (FOR MODIFIED ACCRUAL BASIS ONLY)	7439		-	-	0%	
Total, Other Outgo		-	-	-	0%	
8. TOTAL EXPENDITURES		6,299,311	6,673,317	374,006		
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPEND. BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)		3,361	(91,655)			
D. OTHER FINANCING SOURCES/USES (7600-7699, 8930-8999)						
1. All Other Financing Sources	8930-8979		-	-		
2. Other Uses	7630-7699		-	-		
3. Contributions between unrestricted and restricted accounts (MUST net to zero) (<i>Include contribution to the unfunded cost of Special Education</i>)	8980-8999		-	-		
4. TOTAL OTHER FINANCING SOURCES/USES		-	-	-		
E. NET INCREASE (DECREASE) IN FUND BALANCE/NET POSITION (C + D.4.)		3,361	(91,655)	-		

Innovations Academy (118083)
2021-22 2022-23 2023-24
General Assumptions

COLA & Augmentation	5.07%	13.26%	8.22%
Base Grant Proration Factor	-	0.00%	0.00%
Add-on, ERT & MSA Proration Factor	-	0.00%	0.00%
Student Assumptions:			
Enrollment Count	472	467	434
Unduplicated Pupil Count (UPC)	133	106	141
Unduplicated Pupil Percentage (UPP)	30.73%	27.61%	27.68%
Current Year LCFF Average Daily Attendance (ADA)	461.65	440.39	416.85
Funded LCFF ADA	461.65	440.39	416.85
LCFF ADA Funding Method	Current Year	Current Year	Current Year
Current Year Necessary Small School (NSS) ADA	-	-	-
Funded NSS ADA	-	-	-
NSS ADA Funding Method(s)			

LCFF Entitlement Summary

Base Grant	\$3,789,127	\$4,095,174	\$4,195,786
Grade Span Adjustment	176,046	192,287	188,618
<i>Adjusted Base Grant</i>	\$3,965,173	\$4,287,461	\$4,384,404
Supplemental Grant	243,699	236,754	242,721
Concentration Grant	-	-	-
Total Base, Supplemental and Concentration Grant	\$4,208,872	\$4,524,215	\$4,627,125
Allowance: Necessary Small School	-	-	-
Add-on: Targeted Instructional Improvement Block Grant	-	-	-
Add-on: Home-to-School Transportation	-	-	-
Add-on: Small School District Bus Replacement Program	-	-	-
Add-on: Economic Recovery Target	-	-	-
Add-on: Transitional Kindergarten	-	13,727	-
Total Allowance and Add-On Amounts	\$-	\$13,727	\$-
Total LCFF Entitlement Before Adjustments (excludes Additional State Aid)	\$4,208,872	\$4,537,942	\$4,627,125
Miscellaneous Adjustments	-	-	-
Total LCFF Entitlement (excludes Additional State Aid)	\$4,208,872	\$4,537,942	\$4,627,125
LCFF Entitlement Per ADA (excludes Categorical MSA)	\$9,117	\$10,304	\$11,100
Additional State Aid	-	-	-
Total LCFF Entitlement with Additional State Aid	4,208,872	4,537,942	4,627,125

LCFF Sources Summary
Funding Source Summary

Local Revenue and In-Lieu of Property Taxes (<i>net for school districts</i>)	\$3,398,907	\$3,679,947	\$3,824,832
Education Protection Account Entitlement (<i>includes \$200/min</i>)	\$92,330	\$88,078	\$83,370
Net State Aid (<i>excludes Additional State Aid</i>)	\$717,635	\$769,917	\$718,923
Additional State Aid	\$-	\$-	\$-

Total Funding Sources			
	\$4,208,872	\$4,537,942	\$4,627,125
Funding Source by Resource-Object			
State Aid (Resource Code 0000, Object Code 8011)	\$717,635	\$769,917	\$718,923
EPA, Current Year (Resource 1400, Object Code 8012) (P-2 plus Current Year Accrual)	\$92,330	\$88,078	\$83,370
EPA, Prior Year Adjustment (Resource 1400, Object Code 8019) (P-A less Prior Year Accrual)	\$-	\$1,234	\$-
Property Taxes (Object 8021 to 8089)	\$-	\$-	\$-
In-Lieu of Property Taxes (Object Code 8096)	3,398,907	3,679,947	3,824,832
Entitlement and Source Reconciliation			
Basic Aid/Excess Tax District Status	\$-	\$-	\$-
Total LCFF Entitlement	\$4,208,872	\$4,537,942	\$4,627,125
Additional State Aid	\$-	\$-	\$-
Additional EPA Minimum Entitlement (excess to LCFF Entitlement)	\$-	\$-	\$-
Excess Taxes before Minimum State Aid	\$-	\$-	\$-
Total Funding Sources	\$4,208,872	\$4,537,942	\$4,627,125
LCAP Percentage to Increase or Improve Services Calculation			
Base Grant (<i>Excludes add-ons for TIIG & Transportation</i>)	\$3,965,173	\$4,301,188	\$4,384,404
Supplemental and Concentration Grant funding in the LCAP year	\$243,699	\$236,754	\$242,721
Projected Additional 15% Concentration Grant funding in the LCAP year	\$-	\$-	\$-
Percentage to Increase or Improve Services	6.15%	5.50%	5.54%
PER-ADA FUNDING LEVELS			
Base, Supplemental and Concentration Rate per ADA			
Grades TK-3	\$9,484.15	\$10,677.77	\$11,557.25
Grades 4-6	\$8,719.89	\$9,817.77	\$10,626.42
Grades 7-8	\$8,977.83	\$10,109.01	\$10,940.92
Grades 9-12	\$10,675.10	\$12,020.01	\$13,009.42
Base Grants			
Grades TK-3	\$8,093	\$9,166	\$9,919
Grades 4-6	\$8,215	\$9,304	\$10,069
Grades 7-8	\$8,458	\$9,580	\$10,367
Grades 9-12	\$9,802	\$11,102	\$12,015
Grade Span Adjustment			
Grades TK-3	\$842	\$953	\$1,032
Grades 9-12	\$255	\$289	\$312
Supplemental Grant			
	20%	20%	20%
Maximum - 1.00 ADA, 100% UPP			
Grades TK-3	\$1,787	\$2,024	\$2,190
Grades 4-6	\$1,643	\$1,861	\$2,014
Grades 7-8	\$1,692	\$1,916	\$2,073
Grades 9-12	\$2,011	\$2,278	\$2,465

Actual - 1.00 ADA, Local UPP as follows:	<i>30.73%</i>	<i>27.61%</i>	<i>27.68%</i>
Grades TK-3	\$549	\$559	\$606
Grades 4-6	\$505	\$514	\$557
Grades 7-8	\$520	\$529	\$574
Grades 9-12	\$618	\$629	\$682
Concentration Grant (>55% population)	65%	65%	65%
Maximum - 1.00 ADA, 100% UPP			
Grades TK-3	\$5,808	\$6,577	\$7,118
Grades 4-6	\$5,340	\$6,048	\$6,545
Grades 7-8	\$5,498	\$6,227	\$6,739
Grades 9-12	\$6,537	\$7,404	\$8,013
Actual - 1.00 ADA, Local UPP >55% as follows:	<i>0.00%</i>	<i>0.00%</i>	<i>0.00%</i>
Grades TK-3	\$-	\$-	\$-
Grades 4-6	\$-	\$-	\$-
Grades 7-8	\$-	\$-	\$-
Grades 9-12	\$-	\$-	\$-

\$4,595,308	\$5,077,071	\$5,484,506	\$-	\$-
\$752,828	\$965,618	\$1,167,480	\$-	\$-
\$81,968	\$87,706	\$92,091	\$-	\$-
\$-	\$-	\$-	\$-	\$-
\$-	\$-	\$-	\$-	\$-
3,760,512	4,023,747	4,224,935	-	-
\$-	\$-	\$-	\$-	\$-
\$4,595,308	\$5,077,071	\$5,484,506	\$-	\$-
\$-	\$-	\$-	\$-	\$-
\$-	\$-	\$-	\$-	\$-
\$-	\$-	\$-	\$-	\$-
\$4,595,308	\$5,077,071	\$5,484,506	\$-	\$-
\$4,355,742	\$4,797,112	\$5,192,186	\$-	\$-
\$239,566	\$279,959	\$292,320	\$-	\$-
\$-	\$-	\$-	\$-	\$-
5.50%	5.84%	5.63%	0.00%	0.00%
\$11,676.74	\$12,056.84	\$12,404.13	\$12,131.00	\$12,530.00
\$10,736.74	\$11,086.32	\$11,405.93	\$11,154.00	\$11,521.00
\$11,054.29	\$11,414.41	\$11,742.89	\$11,484.00	\$11,862.00
\$13,145.30	\$13,573.47	\$13,964.29	\$13,656.00	\$14,105.00
\$10,025	\$10,319	\$10,637	\$10,988	\$11,350
\$10,177	\$10,475	\$10,798	\$11,154	\$11,521
\$10,478	\$10,785	\$11,117	\$11,484	\$11,862
\$12,144	\$12,500	\$12,885	\$13,310	\$13,748
\$1,043	\$1,073	\$1,106	\$1,143	\$1,180
\$316	\$325	\$335	\$346	\$357
20%	20%	20%	20%	20%
\$2,214	\$2,278	\$2,349	\$2,426	\$2,506
\$2,035	\$2,095	\$2,160	\$2,231	\$2,304
\$2,096	\$2,157	\$2,223	\$2,297	\$2,372
\$2,492	\$2,565	\$2,644	\$2,731	\$2,821

27.50%	29.18%	28.15%	0.00%	0.00%
\$609	\$665	\$661	\$-	\$-
\$560	\$611	\$608	\$-	\$-
\$576	\$629	\$626	\$-	\$-
\$685	\$748	\$744	\$-	\$-
65%	65%	65%	65%	65%
\$7,194	\$7,405	\$7,633	\$7,885	\$8,145
\$6,615	\$6,809	\$7,019	\$7,250	\$7,489
\$6,811	\$7,010	\$7,226	\$7,465	\$7,710
\$8,099	\$8,336	\$8,593	\$8,876	\$9,168
0.00%	0.00%	0.00%	0.00%	0.00%
\$-	\$-	\$-	\$-	\$-
\$-	\$-	\$-	\$-	\$-
\$-	\$-	\$-	\$-	\$-
\$-	\$-	\$-	\$-	\$-

ACCT	RESOUR CE	ACCOUNT NAME	CURRENT YEAR REVISION #1	JUL
LCFF				LCFF REVENUE
8011		LCFF Revenues	752,828	38,422
8012	1400	Education Protection Account Revenue	81,968	-
8019		Prior Year Income/Adjustments	-	-
8096		Charter Schools Funding In-Lieu of Property Taxes	3,760,512	-
80XX		---	-	-
80XX		---	-	-
80XX		---	-	-
80XX		---	-	-
80XX		---	-	-
80XX		---	-	-
TOTAL LCFF REVENUE			4,595,308	38,422

FEDERAL				FEDERAL REVENUE
8181	3310	Special Education - Entitlement	65,984	-
8182	3327	Special Education - Mental Health	-	-
8220	5310	Federal Child Nutrition Programs	40,000	-
8285	3310	LAUSD Federal SPED	-	-
8290		All Other Federal Revenue	150,000	-
8291	3010	Title I Federal Revenue	43,626	-
8292	4035	Title II	7,432	-
8293	4203	Title III Federal Revenue	-	-
8294	4127	Title IV	10,000	-
8295		Title V Federal Revenue	-	-
80XX		---	-	-
TOTAL FEDERAL REVENUE			317,042	-

OTHER FEDERAL REVENUE ACCT BREAKDOWN

8290		ERC Credit	150,000	
8290		ESSER	-	
8290			-	
8290			-	
8290			-	
8290			-	
8290			-	
8290			-	
8290			-	
TOTAL OTHER FEDERAL REVENUE ACCT BREAKDOWN			150,000	-

OTHER STATE				OTHER STATE
8520	5310	State Child Nutrition Program	75,256	-
8550		Mandated Block Grant	8,362	-
8590		All Other State Revenues	900,087	4,531
8591	6030	SB 740 Revenue	-	-
8599		Prior Year State Income	-	-
8791	6500	SPED State/Other Transfers of Apportionments from I	-	-
8792	6500	SPED State/Other Transfers of Apportionments from C	363,528	19,525
8596	6010	ASES	-	-

8560-1100	1100	Unrestricted Lottery	72,542	-
8560-6300	6300	Restricted Lottery	29,508	-
80XX		---	-	-
80XX		---	-	-
80XX		---	-	-
80XX		---	-	-
80XX		---	-	-
80XX		---	-	-
80XX		---	-	-
TOTAL OTHER STATE REVENUE			1,449,283	24,056

OTHER STATE REVENUE ACCT BREAKDOWN

8590-6565	6565	MENTAL HEALTH	32,746	1,731
8590-2600	2600	ELOP	198,967	
8590-6266	6266	Educator Effectiveness	40,000	
8590-7435	7435	Learning Recovery Emergency Block Grant	287,374	
8590-6762	6762	Arts, Music, and Instructional Materials Block Grant	283,000	
8590-6770	6770	Arts and Music Prop 28	58,000	2,800
8590-7425	7425	ELOG	-	
8590-7032	7032	Kitchen Infrastructure		
TOTAL OTHER STATE REVENUE ACCT BREAKDOWN			900,087	4,531

LOCAL				TOTAL LOCAL
8639		Student Lunch revenue	-	-
8650		Rental Income	133	-
8660		Interest Income	100,000	3,887
8662		Net Increase/Decrease in Investment	-	-
8677		State Local SPED Revenue	-	-
8690		Foundation Grants/Donations	2,775	-
8684		Student Body (ASB) Fundraising Revenue	-	-
8685		School Site fundraising	100,000	5
8688		In Kind Contributions	-	-
8694		Field Trip Revenues	-	-
8698		E-rate Revenues	-	-
8699		All Other Local Revenue	17,121	50
8785		CMO Management Fee Income	-	-
80XX		---	-	-
80XX		---	-	-
80XX		---	-	-
80XX		---	-	-
80XX		---	-	-
80XX		---	-	-
80XX		---	-	-
80XX		---	-	-
TOTAL LOCAL REVENUE			220,029	3,942
TOTAL REVENUE			6,581,663	66,420

1000 - CERTIFICATED EMPLOYEES				TOTAL CERTIF
1100		Teachers' Salaries	2,098,946	153,475
1105		Teachers' Bonuses	-	-

1106	Teachers Stipends	-	-
1120	Substitute Expense	25,000	-
1121	Teachers' Salaries short term subs	-	-
1122	Short Term Subs	-	-
1123	Teachers' Salaries long term subs	-	-
1200	Certificated Pupil Support Salaries	157,000	7,250
1300	Certificated Supervisor and Administrator Salaries	237,000	19,750
1305	Certificated Supervisor and Administrator Bonuses	-	-
1900	Other Certificated Salaries	107,886	6,357
1910	Other Certificated Overtime	-	-
10XX	---	-	-
<i>TOTAL CERTIFICATED EMPLOYEE EXPESSES</i>		2,625,832	186,832

2000 - CLASSIFIED EMPLOYEES				TOTAL CLASSIFIED
2100	Instructional Aide Salaries	405,425	-	
2103	Classified Long Term Sub	-	-	
2105	Instructional Aide Bonus	-	-	
2110	Instructional Aide Overtime	-	-	
2200	Classified Support Salaries (Maintenance, Food)	324,150	22,912	
2205	Classified Support Salaries Bonus	-	-	
2210	Classified Support Overtime	-	-	
2300	Classified Supervisor and Administrator Salaries	-	-	
2305	Classified Supervisor and Admin Bonus	-	-	
2400	Clerical, Technical, and Office Staff Salaries	170,154	12,439	
2405	Clerical Technical and Office Staff Bonus	-	-	
2410	Clerical, Technical, and Office Staff Overtime	-	-	
2900	Other Classified Salaries (Noon and Yard Sup, etc.)	29,393	-	
2901	Other Classified Salaries Substitute	-	-	
2905	Other Stipends	-	-	
2910	Other Classified Overtime	-	-	
20XX	---	-	-	
20XX	---	-	-	
<i>TOTAL CLASSIFIED EMPLOYEE EXPESSES</i>		929,122	35,352	

3000 - EMPLOYEE BENEFITS				TOTAL EMPLOYEE BENEFITS
3101	State Teachers' Retirement System, certificated positions	525,400	33,270	
3102	Employer STRS Classified	8,706	1,305	
3201	Employer PERS Certificated	-	-	
3202	Public Employees' Retirement System, classified positions	-	-	
3301	OASDI/Medicare Certificated, Unrestricted	38,655	2,498	
3302	OASDI/Medicare Classified	74,138	3,110	
3401	Health & Welfare Benefits, Certificated	323,000	40,398	
3402	Health & Welfare Benefits Classified	51,001	6,869	
3403	Health & Welfare Benefits	-	-	
3501	State Unemployment Insurance Certificated	17,252	-	
3502	State Unemployment Insurance Classified	13,166	92	
3503	State Unemployment	-	-	
3601	Worker Compensation Insurance	33,323	4,579	
3602	Worker Compensation Insurance	12,114	866	
3603	Worker Compensation	-	-	

3901			-	-
3902		Other Employee Benefits Classified	-	-
3903		Other Employee Benefits	-	-
<i>TOTAL EMPLOYEE BENEFITS EXPENSES</i>			1,096,754	92,987
TOTAL PAYROLL RELATED EXPENSES			4,651,708	315,171

4000 - BOOKS AND SUPPLIES				TOTAL BOOKS
4100		Approved Textbooks and Core Curriculum	11,915	1,122
4101		Curriculum Assessment and Software	-	-
4102		Supplemental Curriculum	-	-
4200		Books and Other Reference Materials	7,000	166
4215		CSI Materials	-	-
4300		Materials and Supplies	32,500	751
4315		Classroom Materials and Supplies	40,000	3,167
4342		Materials for School Sponsored Athletics	42	-
4381		Materials for Plant Maintenance	17,956	212
4400		Noncapitalized Equipment	25,000	8,424
4407		Student Educational Software	10,000	1,495
4410		Software and Software Licensing	75,000	39,756
4430		Noncapitalized Student Equipment	10,000	7,661
4440		Student Event Materials	-	-
4700		Food and Food Supplies	110,000	-
<i>TOTAL BOOKS AND SUPPLIES</i>			339,413	62,754

5000 - SERVICES AND OTHER OPERATING EXPENSES				TOTAL SERVICE
5100		Subagreements for Services	198,967	-
5200		Travel and Conferences	1,000	-
5206		Parking Expense	-	-
5210		Training and Development Expense	30,000	20,505
5300		Dues and Memberships	12,000	8,416
5400		Insurance	75,000	24,080
5450		Property Taxes	-	-
5500		Operation and Housekeeping Services	85,000	4,753
5501		Utilities	260,000	17,139
5505		Student Transportation/Field Trips	-	-
5600		Space Rental/Leases Expense	120	-
5601		Building Maintenance	50,000	7,473
5602		Other Space Rental	1,500	-
5603		Engagement Space Rental	-	-
5605		Equipment Rental/Lease Expense	30,000	3,552
5610		Equipment Repair	4,000	1,000
5621		Facilities Costs	-	-
5710		Transfer of Direct Costs	-	-
5800		Professional/Consulting Services and Operating Expe	45,000	380
5803		Banking and Payroll Service Fees	18,000	1,318
5805		Legal Services	60,000	3,180
5806		Audit Services	10,500	-
5807		Legal Settlements	60,000	-
5809		Employee Tuition Reimbursement	5,000	-
5810		Educational Consultants	255,000	-

5811	Student Transportation	7,000	-
5812	Other Student Activities	8,250	-
5813	Residential Placement	-	-
5815	Advertising/Recruiting	25,000	5,260
5820	Fundraising Expense	6,000	-
5825	School Pathways	-	-
5830	Field Trip Expenses	80,000	3,799
5836	Transportation Services	-	-
5842	Services Student Athletics	-	-
5850	Scholarships Awarded	-	-
5873	Financial Services	75,000	12,500
5874	Personnel Services	3,000	63
5875	District Oversight Fee	137,859	-
5877	IT Services	8,000	1,500
5885	Summer School Expenses	-	-
5890	Interest Expense/Fees	9,000	124
5891	Charter School Capital Fees	-	-
5892	ASB Activities Expense	-	-
5894	ASB Activities Expense	-	-
5899	CMO Management Fee Expense	-	-
5900	Communications (Tele., Internet, Copies, Postage, Mes	32,000	2,684
5901	Scholar Internet Reimbursement	-	-
5998	Unallocated Credit Card Expense	-	-
5999	Expense Suspense	-	-
50XX	---	-	-
TOTAL SERVICES AND OTHER OPERATING EXPENSES		1,592,196	117,726

6000 - CAPITAL OUTLAY			TOTAL CAPITAL
6900	Depreciation Expense	90,000	-
6901	Amortization Expense	-	-
TOTAL CAPITAL OUTLAY EXPENSES		90,000	-

7000 - OTHER OUTGOING			TOTAL OTHER
7000	Miscellaneous Expense	-	-
7141	Special Education Encroachment District	-	-
7200	Other Transfer	-	-
7201	Write Off of Prior year assets	-	-
7299	All other Transfers	-	-
7310	Transfer of Indirect Costs	-	-
7438	Debt Service - Interest	-	-
7439	Debt Service Amortization	-	-
7619	Other Interfund Transfers out	-	-
70XX	---	-	-
TOTAL OTHER OUTGOING EXPENSES		-	-
TOTAL NON-PAYROLL EXPENSES		2,021,609	

TOTAL EXPENSES	6,673,317	495,650
NET INCOME	(91,654)	(429,230)

Statement of

Cash, Beginning Period	4,418,590
Increase (Decrease) in Cash	
Cash flows from operating activities	
Net Increase/(Decrease) in Net Assets	(429,230)
Accounts Receivable	349,096
Accounts Payable	(77,351)
Other Short Term Liabilities	6,492
Loans Payable Current	
Accrued Liabilities	(13,769)
Other Assets	66,886
IntraCompany	
Cash flows from operating activities	(97,877)
Cash flows from investing activities	1,359
Cash flows from financing activities	(1,405)
Total Increase (Decrease) in Cash	(97,923)
<hr/>	
Cash, End of Period	4,320,667

-	-	-	-	-	-	-	-
250	4,323	6,256	4,360	3,119	6,118	115	115
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
10,107	12,964	12,964	14,296	14,656	14,548	14,043	14,043
19,750	19,750	19,750	19,750	19,750	19,750	19,750	19,750
-	-	-	-	-	-	-	-
6,167	6,167	6,167	6,167	6,167	6,167	12,906	12,906
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
204,836	226,875	208,499	223,481	225,599	225,490	224,844	224,844

FIXED EMPLOYEE EXPENSE DISTRIBUTION

25,514	35,395	63,210	30,785	28,522	35,506	37,298	37,298
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
26,816	29,202	30,412	27,510	27,154	28,801	26,269	26,269
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
15,175	14,832	15,112	14,111	13,677	15,631	13,836	13,836
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
1,957	2,977	3,016	2,373	1,749	2,542	2,956	2,956
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
69,461	82,405	111,750	74,779	71,101	82,480	80,359	80,359

EMPLOYEE BENEFITS DISTRIBUTION

36,829	41,118	45,399	31,518	42,139	42,262	50,573	50,573
1,305	1,305	1,305	875	1,305	1,305	-	-
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
2,758	3,084	2,745	3,256	3,229	3,367	3,543	3,543
5,724	6,682	8,391	5,342	5,061	5,931	6,779	6,779
27,180	13,436	14,945	5,768	40,203	24,384	31,337	31,337
8,896	4,628	10,805	1,713	13,080	8,739	(746)	(746)
-	-	-	-	-	-	-	-
391	587	123	65	62	4,514	2,302	2,302
224	236	263	119	263	1,737	2,046	2,046
-	-	-	-	-	-	-	-
929	(406)	559	1,335	1,406	1,068	4,771	4,771
315	(148)	299	447	443	391	1,900	1,900
-	-	-	-	-	-	-	-

-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
84,550	70,522	84,832	50,438	107,192	93,698	102,507	102,507
358,847	379,802	405,081	348,697	403,893	401,668	407,710	407,710

AND SUPPLIES DISTRIBUTION

2,396	519	70	70	5,674	2,063	0	0
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
916	1,041	451	853	554	803	443	443
-	-	-	-	-	-	-	-
4,437	1,018	1,345	1,256	1,175	2,126	4,079	4,079
5,190	2,702	3,056	3,692	2,675	4,260	4,239	4,239
-	-	-	42	-	-	0	0
3,168	2,040	2,424	1,382	983	1,136	1,322	1,322
4,679	713	517	529	464	382	1,859	1,859
3,810	600	6	-	-	-	818	818
7,169	16,674	262	200	-	115	6,014	2,405
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
256	14,206	-	17,390	5,568	7,610	12,994	12,994
32,022	39,512	8,130	25,412	17,093	18,495	31,767	28,159

ES AND OTHER OPERATING EXPENSES

-	4,423	-	21,918	11,208	17,018	28,880	28,880
-	-	-	-	-	-	200	200
-	-	-	-	-	-	-	-
3,803	1,139	1,200	-	-	1,875	296	296
194	541	-	179	-	-	534	534
16,552	3,977	3,977	3,977	3,977	3,977	2,897	2,897
-	-	-	-	-	-	-	-
1,297	1,825	970	1,094	1,841	1,566	14,331	14,331
2,239	24,563	24,981	18,143	13,742	13,707	29,097	29,097
-	-	-	-	-	-	-	-
-	-	-	-	-	-	24	24
1,066	9,478	2,601	756	10,496	1,054	3,415	3,415
-	-	-	-	-	-	300	300
-	-	-	-	-	-	-	-
1,688	1,688	2,565	2,158	3,043	(31)	3,068	3,068
549	-	1,564	-	705	-	36	36
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
-	486	676	12,500	1,596	589	5,754	5,754
1,657	2,110	2,039	1,901	2,190	2,475	862	862
11,264	15,293	10,000	-	7,070	12,560	127	127
-	-	5,000	-	2,500	-	600	600
-	7,224	-	13,200	16,570	21,458	310	310
-	-	-	-	-	-	1,000	1,000
6,678	12,967	15,239	31,245	26,380	26,709	27,156	27,156

Cash Flows - Indirect Method

4,320,667 4,159,137 4,404,852 4,351,047 4,306,006 4,289,455 4,445,700 4,296,801

(155,709)	205,683	(82,997)	(55,447)	32,019	122,431	(166,898)	78,623
11,560	126,070	23,101	-	18,210	-		
(41,819)	16,749	(28,914)	37,615	26,548	1,574		
6,789	(97,115)	10,815	11,057	(89,545)	11,130		
17,694	1,062	24,236	(37,960)	(5,455)	23,384		
	(6,688)	-	(259)	-	(511)		
(161,484)	245,760	(53,759)	(44,995)	(18,224)	158,009	(166,898)	78,623
1,364	1,378	1,373	1,387	1,383	1,388	18,000	18,000
(1,410)	(1,424)	(1,419)	(1,433)	290	(3,152)		
(161,530)	245,714	(53,805)	(45,041)	(16,551)	156,245	(148,898)	96,623

4,159,137 4,404,852 4,351,047 4,306,006 4,289,455 4,445,700 4,296,801 4,393,424

APR	MAY	JUN
66,038	66,038	66,038
-	-	20,142
-	-	-
258,733	258,733	517,466
-	-	-
-	-	-
-	-	-
-	-	-
-	-	-
324,771	324,771	603,646

13,197	13,197	13,197
-	-	-
4,956	4,956	4,956
-	-	-
-	-	-
-	-	-
1,685	-	1,685
-	-	-
595	-	595
-	-	-
-	-	-
20,433	18,153	20,433

-	-	-

7,285	7,285	7,285
-	-	-
315,467	-	315,467
-	-	-
-	-	(1,481)
-	-	-
31,901	31,901	31,901
-	-	-

6,393	6,393	6,393
3,770	3,770	3,770
-	-	-
-	-	-
-	-	-
-	-	-
-	-	-
-	-	-
-	-	-
364,816	49,349	363,335

-	-	-

-	-	-
-	-	-
9,801	9,801	9,801
-	-	-
-	-	-
555	555	555
-	-	-
6,857	6,857	6,857
-	-	-
-	-	-
-	-	-
0	0	0
-	-	-
-	-	-
-	-	-
-	-	-
-	-	-
-	-	-
-	-	-
-	-	-
17,213	17,213	17,213
727,233	409,486	1,004,627

178,030	178,030	178,030
-	-	-

-	-	-
115	115	115
-	-	-
-	-	-
-	-	-
14,043	14,043	14,043
19,750	19,750	19,750
-	-	-
12,906	12,906	12,906
-	-	-
-	-	-
224,844	224,844	224,844

37,298	37,298	37,298
-	-	-
-	-	-
-	-	-
26,269	26,269	26,269
-	-	-
-	-	-
-	-	-
-	-	-
13,836	13,836	13,836
-	-	-
-	-	-
2,956	2,956	2,956
-	-	-
-	-	-
-	-	-
-	-	-
-	-	-
80,359	80,359	80,359

50,573	50,573	50,573
-	-	-
-	-	-
-	-	-
3,543	3,543	3,543
6,779	6,779	6,779
31,337	31,337	31,337
(746)	(746)	(746)
-	-	-
2,302	2,302	2,302
2,046	2,046	2,046
-	-	-
4,771	4,771	4,771
1,900	1,900	1,900
-	-	-

-	-	-
-	-	-
-	-	-
102,507	102,507	102,507
407,710	407,710	407,710

0	0	-
-	-	-
-	-	-
443	443	443
-	-	-
4,079	4,079	4,079
4,239	2,543	-
0	0	0
1,322	1,322	1,322
1,859	1,859	1,859
818	818	818
2,405	-	-
-	-	2,339
-	-	-
12,994	12,994	12,994
28,159	24,058	23,854

28,880	28,880	28,880
200	200	200
-	-	-
296	296	296
534	534	534
2,897	2,897	2,897
-	-	-
14,331	14,331	14,331
29,097	29,097	29,097
-	-	-
24	24	24
3,415	3,415	3,415
300	300	300
-	-	-
3,068	3,068	3,068
36	36	36
-	-	-
-	-	-
5,754	5,754	5,754
862	862	862
127	127	127
600	600	600
310	310	310
1,000	1,000	1,000
27,156	27,156	27,156

617	617	617
-	-	-
-	-	-
98	98	98
784	784	784
-	-	-
7,914	7,914	7,914
-	-	-
-	-	-
-	-	-
1,547	1,547	1,547
315	315	315
21,945	21,945	21,945
755	755	755
-	-	-
311	311	311
-	-	-
-	-	-
-	-	-
-	-	-
2,696	2,696	2,696
-	-	-
-	-	-
-	-	-
-	-	-
155,870	155,870	155,870

18,000	18,000	18,000
-	-	-
18,000	18,000	18,000

-	-	-
-	-	-
-	-	-
-	-	-
-	-	-
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-	-	-
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-	-	-
-	-	-
-	-	-

609,738	605,637	605,433
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117,494	(196,151)	399,193
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4,393,424 4,528,919 4,350,767

117,494	(196,151)	399,193
		66,709
		(42,165)
		(161,130)
117,494	(196,151)	262,607
18,000	18,000	18,000
135,494	(178,151)	280,607

4,528,919 4,350,767 4,631,375

Copy & Paste your MYP Budg
 Include enrollment, ADA rate, a

Description
A. REVENUES (8000-8799)
1. Local Control Func
LCFF State
Education
State Aid -
Transfers
Other LCF
Total, LCFF Sources
2. Federal Revenues
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ESEA (ESS
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ESEA (ESS
ESEA (ESS
ESEA (ESS
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Special Ed
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Total - Other State]
4. Local Revenue (86
All Local R
Total - Local Reven
5. TOTAL REVENUE
B. EXPENDITURES AND OTHEF
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2. Classified Salaries	
	Instruction
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	Superviso
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	OPEB, Act
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4. Books and Supplie	
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	Total, Books and Su
5. Services and Other	
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6. Capital Outlay	
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7. Other Outgo	
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	All Other]
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	Debt Servi
	Debt Servi
	Total, Other Outgo

8. TOTAL EXPENDI

C. EXCESS (DEFICIENCY) OF RE
BEFORE OTHER FIN.

D. OTHER FINANCING SOURCE

1. All Other Financin

2. Other Uses

3. Contributions bet

(Include c

4. TOTAL OTHER FIN

E. NET INCREASE (DECREASE)

et for FY24-25 thru FY26-27 or use template provided
 nd lines for each revenue and expenditure account utilized

	Projected Enrollment
	ADA Rate
	Projected ADA
	Projected Unduplicated Pupil Count

ding Formula (LCFF) Sources - (8011-8097)
 e Aid - Current Year (CY) (Res 0000)
 Protection Account State Aid (EPA) - CY (Res 1400)
 Prior Years (LCFF State Aid and EPA) (Res 0000 and Res 1400)
 to Charter Schools In Lieu of Property Taxes - CY & PY (Res 0000)
 F Transfers

(8100-8299)
 ESEA (ESSA): Title I, Part A, Basic Grants Low-Income and Neglected (Res 3010)
 ESEA (ESSA): Title II, Part A, Supporting Effective Instruction Local Grants (Res 4035)
 ESEA (ESSA) : Title III, English Learner Student Program (Res 4203)
 ESEA (ESSA) : Title III, Immigrant Student Program (Res 4201)
 ESEA (ESSA): Title IV, Part B, 21st Century Community Learning Centers Program (Res 4124)
 ESEA (ESSA) Title IV, Part A, Student Support and Academic Enrichment Grants (Res 4127)
 ESSA: Title IV, Part C, Public Charter Schools Grant Program (Res 4610)
 Special Ed: IDEA Basic Local Assistance Entitlement, Part B, Sec 611 (Res 3310)
 Special Ed: IDEA Mental Health Allocation Plan, Part B, Sec 611 (Res 3327)
 Child Nutrition - Federal (NSLP) (Res 5310 and others)
 Maintenance and Operations (Public Law 81-874) (Res 0000)
 Other Federal Revenues (All other resources not reported separately)

venues
 ues (8300-8599)
 ial Education (Res 6500)
 ial Education Mental Health Services (Res 6512)
 lock Grant (Res 0000)
 ol Education and Safety (ASES) (Res 6010)
 Core Standards Implementation (Res 7405)
 hool Facility Grant Program (SB 740) (Res 6030)
 LEA Response Funds (SB 117) (Res 7388)
 nrestricted (Res 1100)
 istricted - Prop 20 (Res 6300)
 on 39 - California Clean Energy Jobs Act (Res 6230)
 e Revenues (All other resources not reported separately)

Revenues
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 e Revenues
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S
 R OUTGO (1000-7499)
 es
 Salaries

Object Code	FY24-25 Revised 2nd Interim Budget	FY25-26	FY26-27
	436 94% 409.84 121	467 94% 438.98 128	490 94% 460.6 173
8011	752,828	\$965,618	\$1,167,480
8012	81,968	\$87,706	\$92,091
8019	-		
8096	3,760,512	4,023,747	4,224,935
8091, 8097	-		
	4,595,308	5,077,071	5,484,506
8290	43,626	33,392	33,392
8290	7,432	7,432	7,432
8290	-		-
8290	-		-
8290	-		-
8290	10,000	10,000	10,000
8290	-		-
8181	65,984	56,680	60,710
8182	-		-
8220	40,000	40,000	40,000
8110	-		-
8100-8299	150,000		
	317,042	147,504	151,534
8792	363,528	384,985	403,946
8590	-	37,313	39,151
8550	8,362	8,135	8,135
8677, 8590	-		-
8590	-		-
8590	-		-
8590	-		-
8560	72,542	84,284	88,435
8560	29,508	35,996	37,769
8590	-		-
8300-8599	975,343	250,000	250,000
	1,449,283	800,713	827,436
8600-8799	220,029	200,000	200,000
	220,029	200,000	200,000
	6,581,662	6,225,288	6,663,476
1100	2,123,946	1,947,551	2,122,831

1200	157,000	141,300	154,017
1300	237,000	213,300	232,497
1900	107,886	97,097	105,836
	2,625,832	2,399,248	2,615,181
2100	405,425	400,883	436,962
2200	324,150	291,735	317,991
2300	-	-	-
2400	170,154	153,139	166,921
2900	29,393	26,454	28,835
	929,122	872,211	950,709
3101-3102	534,106	480,695	523,958
3201-3202	-	-	-
3301-3302	112,792	101,513	110,649
3401-3402	374,001	336,601	366,895
3501-3502	30,418	27,376	29,840
3601-3602	45,437	40,893	44,574
3701-3702	-	-	-
3751-3752	-	-	-
3901-3902	-	-	-
	1,096,754	987,078	1,075,916
4100	11,915	10,000	10,400
4200	7,000	7,000	7,280
4300	90,456	90,456	94,074
4400	120,042	130,000	135,200
4700	110,000	110,000	114,400
	339,413	347,456	361,354
5100	198,967	198,967	208,915
5200	31,000	31,000	32,550
5300	12,000	12,000	12,600
5400	75,000	75,000	78,750
5500	345,000	345,000	362,250
5600	85,620	85,620	89,901
5700	-	-	-
5800	812,609	711,939	747,536
5900	32,000	32,000	33,600
	1,592,196	1,491,526	1,566,102
6900	90,000	90,000	90,000
	90,000	90,000	90,000
7110-7143	-	-	-
7211-7213	-	-	-
7221-7223	-	-	-
7280-7299	-	-	-
7300-7399	-	-	-
7430-7439	-	-	-
7439	-	-	-
	-	-	-

	6,673,317	6,187,519	6,659,262
	(91,655)	37,769	4,214
8930-8979	-		
7630-7699	-		
8980-8999	-		
	-	-	-
	(91,655)	37,769	4,214

Board Terms Registered with San Diego Unified

				
As of Date: <input type="text" value="Today"/> 				
Members				
1		Previous term ended on 6/27/2023.		
2		Julia Stoer <i>Secretary</i>	Term 8/1/2023 - 6/30/2026	Original Start Date 8/2/2023
3		Faraz Sharafi <i>Community Member</i>	Term 1/3/2023 - 1/2/2026	Original Start Date 12/6/2016
4		vacant Stephen Rosen is not terminated in the prior term.	Term Jan 9 - 1/8/2028	
5		Danielle Strachman <i>Board Member</i> <i>Co-Founder</i>	Term 12/13/2022 - Dec 12	Original Start Date 12/13/2010
6		Jennifer Williams <i>Parent Representative</i>	No term dates	Original Start Date 12/11/2023
Add new seat and member ▼				

**BYLAWS
OF
INNOVATIONS ACADEMY**

(A California Nonprofit Public Benefit Corporation)

**ARTICLE I
NAME**

Section 1. **NAME.** The name of this corporation is Innovations Academy (referred to herein as “Charter School”).

**ARTICLE II
PRINCIPAL OFFICE OF THE CHARTER SCHOOL**

Section 1. **PRINCIPAL OFFICE OF THE CHARTER SCHOOL.** The principal office for the transaction of the activities and affairs of the Charter School is located in San Diego County, California. The Board of Directors of Innovations Academy (referred to herein as “Board”) may change the location of the principal office. Any such change of location must be noted by the Secretary on these bylaws opposite this Section; alternatively, this Section may be amended to state the new location.

Section 2. **OTHER OFFICES OF THE CHARTER SCHOOL.** The Board may at any time establish branch or subordinate offices at any place or places where the Charter School is qualified to conduct its activities.

**ARTICLE III
GENERAL AND SPECIFIC PURPOSES; LIMITATIONS**

Section 1. **GENERAL AND SPECIFIC PURPOSES.** The purpose of the Charter School is to manage, operate, guide, direct and promote the Charter School, a California public charter school in the San Diego Unified School District. Also in the context of these purposes, the Charter School shall not, except to an insubstantial degree, engage in any other activities or exercise of power that do not further the purposes of the Charter School.

The Charter School shall not carry on any other activities not permitted to be carried on by: (a) a corporation exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code; or (b) a corporation, contributions to which are deductible under section 170(c)(2) of the Internal Revenue Code, or the corresponding section of any future federal tax code. No substantial part of the activities of the Charter School shall consist of the carrying on of propaganda, or otherwise attempting to influence legislation, and the Charter School shall not participate in, or intervene in (including the publishing or distributing of statements) any political campaign on behalf of or in opposition to any candidate for public office.

**ARTICLE IV
CONSTRUCTION AND DEFINITIONS**

Section 1. CONSTRUCTION AND DEFINITIONS. Unless the context indicates otherwise, the general provisions, rules of construction, and definitions in the California Nonprofit Corporation Law shall govern the construction of these bylaws. Without limiting the generality of the preceding sentence, the masculine gender includes the feminine and neuter, the singular includes the plural, and the plural includes the singular, and the term “person” includes both a legal entity and a natural person.

**ARTICLE V
DEDICATION OF ASSETS**

Section 1. DEDICATION OF ASSETS. The Charter School’s assets are irrevocably dedicated to public benefit purposes as set forth in the Charter School’s Charter. No part of the net earnings, properties, or assets of the Charter School, on dissolution or otherwise, shall inure to the benefit of any private person or individual, or to any Board Member or officer of the Charter School. On liquidation or dissolution, all properties and assets remaining after payment, or provision for payment, of all debts and liabilities of the Charter School shall be distributed to a nonprofit fund, foundation, or corporation that is organized and operated exclusively for charitable purposes and that has established its exempt status under Internal Revenue Code section 501(c)(3).

**ARTICLE VI
CORPORATIONS WITHOUT MEMBERS**

Section 1. CORPORATIONS WIHOUT MEMBERS The Charter School shall have no voting members within the meaning of the Nonprofit Corporation Law. The Charter School’s Board may, in its discretion, admit individuals to one or more classes of nonvoting members; the class or classes shall have such rights and obligations as the Board finds appropriate.

**ARTICLE VII
BOARD OF DIRECTORS**

Section 1. GENERAL POWERS. Subject to the provisions and limitations of the California Nonprofit Public Benefit Corporation Law and any other applicable laws, and subject to any limitations of the articles of incorporation or bylaws, the Charter School’s activities and affairs shall be managed, and all corporate powers shall be exercised, by or under the direction of the Board. The Board may delegate the management of the Charter School’s activities to any person(s), management company or Board Committees, however composed, provided that the activities and affairs of the Charter School shall be managed and all corporate powers shall be exercised under the ultimate direction of the Board.

Section 2. SPECIFIC POWERS Without prejudice to the general powers set forth in Section 1 of these bylaws, but subject to the same limitations, the Board shall have the power to:

- a. Appoint and remove, at the pleasure of the Board, all corporate officers, agents, and employees; prescribe powers and duties for them as are consistent with the law, the articles of incorporation, and these bylaws; fix their compensation; and require from them security for faithful service; subject to the terms of any employment contracts and authority previously delegated to the Director of the Charter School (referred to herein as “Director”).
- b. Change the principal office or the principal business office in California from one location to another; cause the Charter School to be qualified to conduct its activities in any other state, territory, dependency, or country; conduct its activities in or outside California; and designate a place in California for holding any meeting of members.
- c. Borrow money and incur indebtedness on the Charter School’s behalf and cause to be executed and delivered for the Charter School’s purposes, in the corporate name, promissory notes, bonds, debentures, deeds of trust, mortgages, pledges, hypothecations, and other evidences of debt and securities.
- d. Adopt and use a corporate seal; prescribe the forms of membership certificates; and alter the forms of the seal and certificates.

Section 3. DESIGNATED BOARD MEMBERS AND TERMS The number of Board Members shall be no less than three (3) and no more than seventeen (17), unless changed by amendments to these bylaws. The number of Board Members shall be established by resolution. All Board Members shall be designated by the existing Board. All Board Members whose terms are expiring are to be designated at the Charter School’s annual meeting of the Board. The Board shall consist of at least three (3) Board Members unless changed by amendment to these bylaws. Terms of the Board Members shall be staggered so that one-third (or as near to one-third as practicable) shall be elected at each annual meeting.

Section 4. RESTRICTION ON INTERESTED PERSONS AS BOARD MEMBERS; QUALIFICATIONS No more than 49 percent of the persons serving on the Board may be interested persons. An interested person is (a) any person compensated by the Charter School for services rendered to it within the previous 12 months, whether as a full-time or part-time employee, independent contractor, or otherwise, excluding any reasonable compensation paid to a Board Member as Board Member; and (b) any brother, sister, ancestor, descendant, spouse, brother-in-law, sister-in-law, son-in-law, daughter-in-law, mother-in-law, or father-in-law of such person. However, any violation of this paragraph shall not affect the validity or enforceability of transactions entered into by the Charter School. The Board may adopt other policies circumscribing potential conflicts of interest.

One Board Member shall be a parent of a student who is currently enrolled in the Charter School designated by the Board from among those nominated by a parent organization or by the nominating committee appointed pursuant to Section 6.

One Board Member shall be a teacher currently employed at the Charter School and designated by the Board from among those nominated by the teachers or by the nominating committee appointed pursuant to Section 6.

The remaining Board Members shall be persons who support the mission of the Charter School and who have expertise in business, education, finance, law, public relations or marketing, government, or represent the community; provided that such persons shall not also be parents of children enrolled at the Charter School at the time of their initial election to the Board. These Board Members shall be elected from among those nominated by the nominating committee appointed pursuant to Section 6, and those nominated by the Chief Educational Officer. Notwithstanding the foregoing, if no more than one candidate is nominated for any position on the Board, the Board may also consider nominations from any other source.

Section 5. BOARD MEMBERS' TERM Each Board Member shall hold office for three (3) years and until a successor Board Member has been designated and qualified.

Section 6. NOMINATIONS BY COMMITTEE The Chairman of the Board or, if none, the Vice-Chairman will appoint a committee to designate qualified candidates for election to the Board at least thirty (30) days before the date of the annual meeting at which the election of Board Members is to occur. The nominating committee shall make its report at least seven (7) days before the date of the election or at such other time as the Board may set and the Secretary shall forward to each Board Member, with the notice of meeting required by these bylaws, a list of all candidates nominated for each Board Member position.

Section 7. USE OF CORPORATE FUNDS TO SUPPORT NOMINEE If more people have been nominated for Board Member than can be elected, no corporation funds may be expended to support a nominee without the Board's authorization.

Section 8. EVENTS CAUSING VACANCIES ON BOARD A vacancy or vacancies on the Board shall occur in the event of (a) the death, resignation, or removal of any Board Member; (b) the declaration by resolution of the Board of a vacancy in the office of a Board Member who has been convicted of a felony, declared of unsound mind by a court order, or found by final order or judgment of any court to have breached a duty under California Nonprofit Public Benefit Corporation Law, Chapter 2, Article, 3; (c) the increase of the authorized number of Board Members; or (d) the failure of the members, at any meeting of members at which any Board Member or Board Members are to be elected, to elect the number of Board Members required to be elected at such meeting; (e) for the parent- Board Member, whenever the Board Member no longer has a child enrolled at the Charter School; and (f) for the teacher- Board Member, upon termination of employment with the Charter School; (g) for any other Board Member, upon taking an office or employment which is inconsistent with, or incompatible with continued service to the Charter School, as determined by the Board.

Section 9. RESIGNATION OF BOARD MEMBERS Except as provided below, any Board Member may resign by giving written notice to the Chairman of the Board, if any, or to the Director, or the Secretary, or to the Board. The resignation shall be effective when the notice is given unless the notice specifies a later time for the resignation to become effective. If a

Board Member's resignation is effective at a later time, the Board may elect a successor to take office as of the date when the resignation becomes effective.

Section 10. BOARD MEMBER MAY NOT RESIGN IF NO BOARD MEMBER REMAINS. Except on notice to the California Attorney General, no Board Member may resign if the Charter School would be left without a duly elected Board Member or Board Members.

Section 11. REMOVAL OF BOARD MEMBERS Any Board Member may be removed, with or without cause, by the vote of the majority of the members of the entire Board at a special meeting called for that purpose, or at a regular meeting, provided that notice of that meeting and of the removal questions are given in compliance with the provisions of the Ralph M. Brown Act. (Chapter 9 (commencing with Section 54950) of Division 2 of Title 5 of the Government Code). Any vacancy caused by the removal of a Board Member shall be filled as provided in Section 12.

Section 12. VACANCIES FILLED BY BOARD. Vacancies on the Board may be filled by approval of the Board or, if the number of Board Members then in office is less than a quorum, by (a) the unanimous consent of the Board Members then in office, (b) the affirmative vote of a majority of the Board Members then in office at a meeting held according to notice or waivers of notice complying with Corporations Code Section 5211, or (c) a sole remaining Board Member. In the event of a vacancy, the Chairman of the Board shall notify the persons or organizations entitled to make nominations pursuant to Section 4 of their right to propose nominees for that vacancy and the date on which the Board will consider filling the vacancy. Notwithstanding Section 6, the Board may consider filling a vacancy at any meeting of the Board which is called in accordance with the Brown Act which occurs at least 7 days after notice is given by the Chairman to the persons or organizations entitled to make nominations.

Section 13. NO VACANCY ON REDUCTION OF NUMBER OF BOARD MEMBERS. Any reduction of the authorized number of Board Members shall not result in any Board Members being removed before his or her term of office expires.

Section 14. PLACE OF BOARD MEETINGS. Meetings shall be held at the principal office of the Charter School. The Board may designate that a meeting be held at any place within the San Diego Unified School District that has been designated by resolution of the Board or in the notice of the meeting. All meetings of the Board shall be called, held and conducted in accordance with the terms and provisions of the Ralph M. Brown Act, California Government Code Sections 54950, et seq., as said chapter may be modified by subsequent legislation.

Section 15. MEETINGS; ANNUAL MEETINGS All meetings of the Board and its Board Committees created pursuant to Section 23 shall be called, noticed, and held in compliance with the provisions of the Ralph M. Brown Act ("Brown Act"). (Chapter 9 (commencing with Section 54950) of Division 2 of Title 5 of the Government Code).

The Board shall meet annually on the first Monday in October, or as soon thereafter as practicable, for the purpose of electing Board Members, organization, appointment of officers, and the transaction of such other business as may properly be brought before the meeting. This

meeting shall be held at a time, date, and place as may be specified and noticed by resolution of the Board.

Section 16. **REGULAR MEETINGS** Regular meetings of the Board, including annual meetings, shall be held at such times and places as may from time to time be fixed by the Board. At least 72 hours before a regular meeting, the Board, or its designee shall post an agenda containing a brief general description of each item of business to be transacted or discussed at the meeting.

Section 17. **SPECIAL MEETINGS** Special meetings of the Board for any purpose may be called at any time by the Chairman of the Board, if there is such an officer, or a majority of the Board. The party calling a special meeting shall determine the place, date, and time thereof.

Section 18. **NOTICE OF SPECIAL MEETINGS** In accordance with the Brown Act, special meetings of the Board may be held only after twenty-four (24) hours notice is given to each Board Member and to the public through the posting of an agenda. Pursuant to the Brown Act, the Board shall adhere to the following notice requirements for special meetings:

- a. Any such notice shall be addressed or delivered to each Board Member at the Board Member's address as it is shown on the records of the Charter School, or as may have been given to the Charter School by the Board Member for purposes of notice, or, if an address is not shown on the Charter School's records or is not readily ascertainable, at the place at which the meetings of the Board are regularly held.
- b. Notice by mail shall be deemed received at the time a properly addressed written notice is deposited in the United States mail, postage prepaid. Any other written notice shall be deemed received at the time it is personally delivered to the recipient or is delivered to a common carrier for transmission, or is actually transmitted by the person giving the notice by electronic means to the recipient. Oral notice shall be deemed received at the time it is communicated, in person or by telephone or wireless, to the recipient or to a person at the office of the recipient whom the person giving the notice has reason to believe will promptly communicate it to the receiver.
- c. The notice of special meeting shall state the time of the meeting, and the place if the place is other than the principal office of the Charter School, and the general nature of the business proposed to be transacted at the meeting. No business, other than the business the general nature of which was set forth in the notice of the meeting, may be transacted at a special meeting.

Section 19. **QUORUM** A majority of the number of Board Members currently in office shall constitute a quorum. If a quorum is present, the affirmative vote of the majority of the voting power represented at the meeting, entitled to vote, and voting on any matter shall be a

decision of the Board. Should there be fewer than a majority of the Board Members present at any meeting, the meeting shall be adjourned. Voting Board Members may not vote by proxy.

Section 20. TELECONFERENCE MEETINGS. Board Members may participate in teleconference meetings so long as all of the following requirements in the Brown Act are complied with:

- a. At a minimum, a quorum of the Board Members shall participate in the teleconference meeting from locations within the boundaries of the State of California;
- b. All votes taken during a teleconference meeting shall be by roll call;
- c. If the Board elects to use teleconferencing, it shall post agendas at all teleconference locations with each teleconference location being identified in the notice and agenda of the meeting;
- d. All locations where a Board Member 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;¹
- e. 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 directly at each teleconference location; and
- f. 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.²

Section 21. ADJOURNMENT A majority of the Board Members present, whether or not a quorum is present, may adjourn any Board meeting to another time or place and shall cause a notice of adjournment to be posted within 24 hours. If a meeting is adjourned for more than five days, notice of such adjournment to another time or place shall be given, prior to the time schedule for the continuation of the meeting, to the Board Members who were not present at the time of the adjournment, and to the public in the manner prescribed by any applicable public open meeting law.

Section 22. COMPENSATION AND REIMBURSEMENT Board Members may receive such compensation, if any, for their services as Board Members or officers, and such reimbursement of expenses, as the Board may establish by resolution to be just and reasonable as to the Charter School at the time that the resolution is adopted.

¹ This means that Board Members who choose to utilize their homes or offices as teleconference locations must open these locations to the public and accommodate any members of the public who wish to attend the meeting at that location.

² The Brown Act prohibits requiring members of the public, to provide their names as a condition of attendance at the meeting; however, those wishing to speak may be required to identify themselves.

Section 23. CREATION AND POWERS OF BOARD COMMITTEES The Board, by resolution adopted by a majority of the Board Members then in office, may create one or more Board Committees, each consisting of two or more voting Board Members and no one who is not a Board Member, to serve at the pleasure of the Board. Appointments to Board Committees of the Board shall be recommended by the Chairman and approved by majority vote of the Board Members then in office. The Board may appoint one or more Board Members as alternate members of any such Board Committee, who may replace any absent member at any meeting. Any such Board Committee may have all the authority of the Board, if so provided in the Board' resolution, except that no Board Committee may:

- a. Fill vacancies on the Board or any Board Committee of the Board;
- b. Fix compensation of the Board Members for serving on the Board or on any Board Committee;
- c. Amend or repeal bylaws or adopt new bylaws;
- d. Amend or repeal any resolution of the Board that by its express terms is not so amendable or subject to repeal;
- e. Create any other Board Committees of the Board or appoint the members of Board Committees of the Board;
- f. Expend corporate funds to support a nominee for Board Member if more people have been nominated for Board Member than can be elected; or
- g. Approve any contract or transaction to which the Charter School is a party and in which one or more of its Board Members has a material financial interest.

Other committees, not having the authority of the Board and not limited in composition to Board Members, but serving in an advisory capacity either to the Board or to the Director, may be established from time to time by the Board or the Director. Such committees, if created by formal action of the Board, will comply with the Brown Act.

Section 24. MEETINGS AND ACTION OF BOARD COMMITTEES Meetings and actions of Board Committees of the Board shall be governed by, held, and taken under the provisions of these bylaws concerning meetings, other Board' actions, and the Brown Act, if applicable, except that the time for general meetings of such Board Committees and the calling of special meetings of such Board Committees may be set either by Board' resolution or, if none, by resolution of the Board Committee. Minutes of each meeting shall be kept and shall be filed with the corporate records. The Board may adopt rules for the governance of any Board Committee as long as the rules are consistent with these bylaws. If the Board has not adopted rules, the Board Committee may do so.

Section 25. NON-LIABILITY OF BOARD MEMBERS No Board Member shall be personally liable for the debts, liabilities, or other obligations of the Charter School.

Section 26. **COMPLIANCE WITH LAWS GOVERNING STUDENT RECORDS** The Charter School and the Board shall comply with an applicable provisions of the Family Education Rights Privacy Act (“FERPA”) as set forth in Title 20 of the United States Code Section 1232g and attendant regulations as they may be amended from time to time.

ARTICLE VIII OFFICERS OF THE CHARTER SCHOOL

Section 1. **OFFICES HELD.** The officers of the Charter School shall be a Chairman of the Board, a Director of the Charter School, a Secretary, and a Chief Financial Officer who shall be referred to as “Treasurer.” The Board shall elect a Chairman of the Board, and may appoint a Vice Chairman, one or more assistant secretaries, one or more assistant treasurers, and such other officers as may be appointed under Article VIII, Section 4, of these bylaws. The officers shall have the corporate duties set forth in this Article VIII, and, if employees of the Charter School, shall also have administrative duties as set forth in any applicable contract for employment or job specification.

Section 2. **DUPLICATION OF OFFICE HOLDERS** Any number of offices may be held by the same person, except that neither the Secretary nor the Treasurer may serve concurrently as either the Director or Chairman or Vice-Chairman of the Board.

Section 3. **ELECTION OF OFFICERS** The officers of the Charter School shall be chosen annually by the Board and shall serve at the pleasure of the Board, subject to the rights of any officer under any employment contract.

Section 4. **APPOINTMENT OF OTHER OFFICERS** The Board may appoint, or authorize the Chairman of the Board to appoint any other officers that the Charter School may require. Each appointed officer shall have the title and authority, hold office for the period, and perform the duties specified in the bylaws or established by the Board.

Section 5. **REMOVAL OF OFFICERS** Without prejudice to the rights of any officer under an employment contract, the Board may remove any officer with or without cause. An officer who was not chosen by the Board may be removed by any other officer on whom the Board confers the power of removal.

Section 6. **RESIGNATION OF OFFICERS** Any officer may resign at any time by giving written notice to the Board. The resignation shall take effect on the date the notice is received or at any later time specified in the notice. Unless otherwise specified in the notice, the resignation need not be accepted to be effective. Any resignation shall be without prejudice to any rights of the Charter School under any contract to which the officer is a party.

Section 7. **VACANCIES IN OFFICE** A vacancy in any office because of death, resignation, removal, disqualification, or any other cause shall be filled in the manner prescribed in these bylaws for normal appointment to that office, provided, however, that vacancies need not be filled on an annual basis.

Section 8. **CHAIRMAN OF THE BOARD** The Chairman of the Board shall preside at the Board' meetings and shall exercise and perform such other powers and duties as the Board may assign from time to time. If there is no Director, and no interim Director has been appointed, the Chairman of the Board shall also be the Director and shall have the powers and duties of the Charter School set forth in these bylaws. There may also be a Vice-Chairman of the Board. In the absence of the Chairman, the Vice-Chairman shall preside at Board meetings and shall exercise and perform such other powers and duties as the Board may assign from time to time.

Section 9. **DIRECTOR OF THE CHARTER SCHOOL** Subject to such supervisory powers as the Board may give to the Chairman of the Board, if any, and subject to the control of the Board, and subject to the Director's contract of employment, the Director shall be the general manager of the Charter School and shall supervise, direct, and control the Charter School's activities, affairs, and officers as fully described in any applicable employment contract, agreement, or job specification. The Director shall have such other powers and duties as the Board or the bylaws may require.

Section 10. **SECRETARY** The Secretary shall keep or cause to be kept, at the Charter School's principal office or such other place as the Board may direct, a book of minutes of all meetings, proceedings, and actions of the Board and of Board Committees. The Secretary may be, but is not required to be a Board Member. The minutes of meetings shall include the time and place that the meeting was held; whether the meeting was annual, regular, special, or emergency and, if special or emergency, how authorized; the notice given; and the names of the Board Members present at Board and Board Committee meetings.

The Secretary shall keep or cause to be kept, at the principal California office, a copy of the articles of incorporation and bylaws, as amended to date.

The Secretary shall give, or cause to be given, notice of all meetings of the Board and Board Committees that these bylaws require to be given. The Secretary shall keep the corporate seal, if any, in safe custody and shall have such other powers and perform such other duties as the Board or the bylaws may require. The Board may appoint one or more deputy secretaries to assist the Secretary.

Section 11. **TREASURER** The Treasurer shall keep and maintain, or cause to be kept and maintained, adequate and correct books and accounts of the Charter School's properties and transactions. The Treasurer may be, but is not required to be a Board member. The Treasurer shall send or cause to be given to Board Members such financial statements and reports as are required to be given by law, by these bylaws, or by the Board. The books of account shall be open to inspection by any Board Member at all reasonable times.

The Treasurer shall (a) deposit, or cause to be deposited, all money and other valuables in the name and to the credit of the Charter School with such depositories as the Board may designate; (b) disburse the Charter School's funds as the Board may order, (c) render to the Director, Chairman of the Board, if any, and the Board, when requested, an account of all transactions as Treasurer and of the financial condition of the Charter School; and (d) have such other powers and perform such other duties as the Board, contract, job specification, or the bylaws may require.

If required by the Board, the Treasurer shall give the Charter School a bond in the amount and with the surety or sureties specified by the Board for faithful performance of the duties of the office and for restoration to the Charter School of all of its books, papers, vouchers, money, and other property of every kind in the possession or under the control of the Treasurer on his or her death, resignation, retirement, or removal from office. The Board may appoint one or more deputy treasurers to assist the Treasurer.

ARTICLE IX CONTRACTS WITH BOARD MEMBERS

Section 1. **CONTRACTS WITH BOARD MEMBERS** The Charter School shall not enter into a contract or transaction in which a Board Member directly or indirectly has a material financial interest (nor any other corporation, firm, association, or other entity in which one or more of the Charter School's Board Members are Board Members have a material financial interest) unless all of the following apply:

- a. The Board Member with a material financial interest in the proposed contract or transaction fully discloses his/her financial interest in such contract or transaction in good faith and said disclosure is noted in the Board meeting minutes.
- b. The Board Member with a material financial interest in the proposed contract or transaction recuses himself/herself from any participation whatsoever in the proposed contract or transaction (i.e., the interested Board Member who recuses himself/herself shall refrain from voting on the matter and shall leave the room during Board discussion and when the final vote is taken).
- c. Such contract or transaction is authorized in good faith by a majority of the Board by a vote sufficient for that purpose.
- d. Before authorizing or approving the transaction, the Board considers and in good faith decides after reasonable investigation that the Charter School could not obtain a more advantageous arrangement with reasonable effort under the circumstances.
- e. The Charter School for its own benefit enters into the transaction, which is fair and reasonable to the Charter School at the time the transaction was entered into.

This Section does not apply to a transaction that is part of an educational or charitable program of the Charter School if it (a) is approved or authorized by the Charter School in good faith and without unjustified favoritism and (b) results in a benefit to one or more Board Members or their families because they are in the class of persons intended to be benefited by the educational or charitable program of the Charter School.

ARTICLE X
CONTRACTS WITH NON-BOARD MEMBER DESIGNATED EMPLOYEES

Section 1. **CONTRACTS WITH NON-BOARD MEMBER DESIGNATED EMPLOYEES.** The Charter School shall not enter into a contract or transaction in which a non-Board Member designated employee (e.g., officers and other key decision-making employees) directly or indirectly has a material financial interest unless all of the requirements in the Innovations Academy Conflict of Interest Code adopted in accordance with the Political Reform Act have been fulfilled.

ARTICLE XI
LOANS TO BOARD MEMBERS AND OFFICERS

Section 1. **LOANS TO BOARD MEMBERS AND OFFICERS** The Charter School shall not lend any money or property to or guarantee the obligation of any Board Member or officer without the approval of the California Attorney General; provided, however, that the Charter School may advance money to a Board Member or officer of the Charter School for expenses reasonably anticipated to be incurred in the performance of his or her duties if that Board Member or officer would be entitled to reimbursement for such expenses of the Charter School.

ARTICLE XII
INDEMNIFICATION

Section 1. **INDEMNIFICATION** To the fullest extent permitted by law, the Charter School shall indemnify its Board Members, officers, employees, and other persons described in Corporations Code Section 5238(a), including persons formerly occupying any such positions, against all expenses, judgments, fines, settlements, and other amounts actually and reasonably incurred by them in connection with any “proceeding,” as that term is used in that section, and including an action by or in the right of the Charter School by reason of the fact that the person is or was a person described in that section. “Expenses,” as used in this bylaw, shall have the same meaning as in that section of the Corporations Code.

On written request to the Board by any person seeking indemnification under Corporations Code Section 5238(b) or Section 5238(c) the Board shall promptly decide under Corporations Code Section 5238(e) whether the applicable standard of conduct set forth in Corporations Code Section 5238(b) or Section 5238(c) has been met and, if so, the Board shall authorize indemnification.

Section 2. **STANDARD OF CARE**

A Board Member shall perform the duties of a Board Member, including duties as a member of any Board Committee upon which the Board Member may serve, in good faith, in a manner such Board Member believes to be in the best interests of the Charter School and with such care, including reasonable inquiry, as an ordinarily prudent person in a like position would use under similar circumstances. In performing the duties of a Board Member, a Board Member

shall be entitled to rely on information, opinions, reports or statements, including financial statements and other financial data, in each case prepared or presented by:

One or more officers or employees of the Charter School whom the Board Member believes to be reliable and competent in the matters presented;

Counsel, independent accountants or other persons as to matters which the Board Member believes to be within such person's professional or expert competence; or

A Board Committee upon which the Board Member does not serve as to matters within its designated authority, provided the Board Member believes the Board Committee merits confidence and the Board Member acts in good faith, after reasonable inquiry when the need therefor is indicated by the circumstances and without knowledge that would cause such reliance to be unwarranted.

Section 3. SELF-DEALING TRANSACTIONS.

Self-dealing transactions means transactions to which the Charter School is a party and in which one or more of the Board Members (“interested Board Member(s)”) has a material financial interest. Notwithstanding this definition of self-dealing transaction, the following transactions do not constitute self-dealing transactions:

- A. An action by the Board fixing the compensation of a Board Member as a Board Member or officer of the Charter School;
- B. A transaction which is part of a public or charitable program of the Charter School if the transaction is (1) approved or authorized by the Charter School in good faith and without unjustified favoritism, and (2) results in a benefit to one or more Board Members or their families because they are in a class of persons intended to be benefited by the public or charitable program;
- C. A transaction of which the interested Board Members have no actual knowledge, and which does not exceed the lesser of one percent (1%) of the Charter School’s gross receipts for the fiscal year immediately preceding the year in which such transaction occurs or One Hundred Thousand Dollars (\$100,000).
- D. A transaction the Attorney General has approved either before or after it was consummated.
- E. A transaction with respect to which the following facts are established:

The Charter School entered into the transaction for its own benefit;

The transaction was fair and reasonable as to the Charter School at the time the Charter School entered into the transaction;

Prior to consummating the transaction or any part thereof, the Board authorized or approved the transaction in good faith by vote of a majority of the Board Members then in office excluding the vote of the interested Board Member(s) and with knowledge of the material facts concerning the transaction and the interested Board Member's interest in it. Except as provided in this sub-paragraph of this subsection, action by a Board Committee will not satisfy this requirement; and

Prior to authorizing or approving the transaction, the Board considered and in good faith determined after reasonable investigation under the circumstances that the Charter School could not have obtained a more advantageous arrangement with reasonable effort under the circumstances, or the Charter School in fact could not have obtained a more advantageous arrangement with reasonable effort under the circumstances; *or*

A Board Committee or person authorized by the Board approved the transaction in a manner consistent with the standards prescribed for approval by the Board under this subsection; it was not reasonably practical to obtain approval of the Board prior to entering into the transaction; and the Board, after determining in good faith that the conditions set forth in paragraphs (A) and (B) were satisfied, ratified the transaction at its next meeting by a vote of a majority of the Board Members then in office, excluding the vote of the interested Board Member(s).

Section 4. INTERESTED BOARD MEMBER'S VOTE

In determining whether the Board validly met to authorize or approve a self-dealing transaction, interested Board Members may be counted to determine the presence of a quorum, but an interested shall not vote pursuant to Article 9 Section 1(b).

Section 5. PERSONS LIABLE AND EXTENT OF LIABILITY

If a self-dealing transaction has not been approved as provided in this Article, the interested Board Member(s) may be required to do such things and pay such damages as a court may provide as an equitable and fair remedy to the Charter School, considering any benefit received by it and whether or not the interested Board Member(s) acted in good faith and with the intent to further the best interests of the Charter School.

Section 6. CONTRACTS OR TRANSACTIONS WITH MUTUAL BOARD MEMBERS

No contract or other transaction between the Charter School and any domestic or foreign corporation, firm or association of which one or more of the Charter School's Board Members are Board Members is either void or voidable because such Board Member(s) are present at the meeting of the Board or Board Committee which authorizes, approves or ratifies the contract or transaction if:

The material facts as to the transaction and as to such Board Member's other Board Membership are fully disclosed or known to the Board or Board Committee, and the Board or Board Committee authorizes, approves or ratifies the contract or transaction in good faith by a vote sufficient without counting the vote of the common Board Member(s); or

As to contracts or transactions not approved as provided in subsection (i) of this Section, the contract or transaction is just and reasonable as to the Charter School at the time it is authorized, approved or ratified.

Notwithstanding the foregoing, this Section shall not apply to self-dealing transactions described in this Article.

Section 7. GENERAL PUBLIC AGENCY PROHIBITIONS GOVERNING CERTAIN TRANSACTIONS

Nothing in these bylaws shall be construed to authorize any transaction otherwise prohibited under the Political Reform Act (California Government Code Section 81000 et seq.), or other applicable laws.

**ARTICLE XIII
INSURANCE**

Section 1. **INSURANCE** The Charter School shall have the right to purchase and maintain insurance to the full extent permitted by law on behalf of its Board Members, officers, employees, and other agents, to cover any liability asserted against or incurred by any Board Member, officer, employee, or agent in such capacity or arising from the Board Member's, officer's, employee's, or agent's status as such.

**ARTICLE XIV
MAINTENANCE OF CORPORATE RECORDS**

Section 1. **MAINTENANCE OF CORPORATE RECORDS** The Charter School shall keep:

- a. Adequate and correct books and records of account;
- b. Written minutes of the proceedings of the Board and Board Committees; and
- c. Such reports and records as required by law.

**ARTICLE XV
INSPECTION RIGHTS**

Section 1. **BOARD MEMBERS' RIGHT TO INSPECT.** Every Board Member shall have the right at any reasonable time to inspect the Charter School's books, records, documents of every kind, physical properties, and the records of each subsidiary as permitted by California and federal law. The inspection may be made in person or by the Board Member's agent or attorney. The right of inspection includes the right to copy and make extracts of documents as permitted by California and federal law. This right to inspect may be circumscribed in instances where the right to inspect conflicts with California or federal law (e.g., restrictions on the release of educational records under FERPA) pertaining to access to books, records, and documents.

Section 2. ACCOUNTING RECORDS AND MINUTES. On written demand to the Charter School, any Board Member may inspect, copy, and make extracts of the accounting books and records and the minutes of the proceedings of the Board and Board Committees at any reasonable time for a purpose reasonably related to the Board Member's interest as a Board Member. Any such inspection and copying may be made in person or by the Board Member's agent or attorney. This right of inspection extends to the records of any subsidiary of the Charter School.

Section 3. MAINTENANCE AND INSPECTION OF ARTICLES AND BYLAWS. The Charter School shall keep at its principal California office the original or a copy of the articles of incorporation and bylaws, as amended to the current date, which shall be open to inspection by the Board Members at all reasonable times during office hours. If the Charter School has no business office in California, the Secretary shall, on the written request of any Board Member, furnish to that Board Member a copy of the articles of incorporation and bylaws, as amended to the current date.

ARTICLE XVI REQUIRED REPORTS

Section 1. ANNUAL REPORTS. The Board shall cause an annual report to be sent to itself (the members of the Board) within 120 days after the end of the Charter School's fiscal year. That report shall contain the following information, in appropriate detail:

- a. The assets and liabilities, including the trust funds, or the Charter School as of the end of the fiscal year;
- b. The principal changes in assets and liabilities, including trust funds;
- c. The Charter School's revenue or receipts, both unrestricted and restricted to particular purposes;
- d. The Charter School's expenses or disbursement for both general and restricted purposes;
- e. Any information required under these bylaws; and
- f. An independent accountant's report or, if none, the certificate of an authorized officer of the Charter School that such statements were prepared without audit from the Charter School's books and records.

Section 2. ANNUAL STATEMENT OF CERTAIN TRANSACTIONS AND INDEMNIFICATIONS. As part of the annual report to all Board Members, or as a separate document if no annual report is issued, the Charter School shall, within 120 days after the end of the Charter School's fiscal year, annually prepare and mail or deliver to each Board Member and furnish to each Board Member a statement of any transaction or indemnification of the following kind:

- a. Any transaction (i) in which the Charter School, or its parent or subsidiary, was a party, (ii) in which an “interested person” had a direct or indirect material financial interest, and (iii) which involved more than \$50,000 or was one of several transactions with the same interested person involving, in the aggregate, more than \$50,000. For this purpose, an “interested person” is either:
- (1) Any Board Member or officer of the Charter School, its parent, or subsidiary (but mere common Board Membership shall not be considered such an interest); or
 - (2) Any holder of more than 10 percent of the voting power of the Charter School, its parent, or its subsidiary.

The statement shall include a brief description of the transaction, the names of interested persons involved, their relationship to the Charter School, the nature of their interest, provided that if the transaction was with a partnership in which the interested person is a partner, only the interest of the partnership need be stated.

ARTICLE XVII BYLAW AMENDMENTS

Section 1. **BYLAW AMENDMENTS.** The Board may adopt, amend or repeal any of these bylaws by a majority of the Board Members present at a meeting duly held at which a quorum is present, except that no amendment shall change any material provisions of the Charter that created the Charter School or make any provisions of these bylaws inconsistent with that Charter, the Charter School’s Articles of Incorporation, or any laws.

ARTICLE XVIII FISCAL YEAR

Section 1. **FISCAL YEAR OF THE CHARTER SCHOOL.** The fiscal year of the Charter School shall begin on July 1st and end on June 30th of each year.

CERTIFICATE OF SECRETARY

I certify that I am the duly elected and acting Secretary of the Innovations Academy, Inc, a California nonprofit public benefit corporation; that these bylaws, consisting of 17 pages, are the bylaws of the Charter School as adopted by the Board on November __, 2013 and that these bylaws have not been amended or modified since that date.

Executed on 11/19 _____, 2013, at San Diego, California.

Secretary



Monitoring Goals, Actions, and Resources for the 2024-25 Local Control and Accountability Plan (LCAP)

This template is intended for internal monitoring purposes only. The 2024-25 LCAP template and instructions should be consulted when completing required documents.

(6) (A) The superintendent of the school district 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 board of the school district. (B) The report shall include both of the following: (i) All available midyear outcome data related to metrics identified in the current year's local control and accountability plan. (ii) All available midyear expenditure and implementation data on all actions identified in the current year's local control and accountability plan.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Innovations Academy	Christine Kuglen Director	christine@innovationsacademy.org 858-271-1414

Goal 1

Goal Description

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

Expected Annual Measurable Objectives

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
1.1	% of grade 3-8 students meeting/exceeding standards on the Math SBAC	Schoolwide: 57.82% Hispanic: 47.54% SED: 78.95% SWD: 59.70% White: 60.00%			2023-24 SBAC Math Schoolwide 57.82% meeting or exceeding standards Hispanic: 40.57% SED: 32.97% SWD: 39.48% White: 48.51%	Schoolwide: 62% Hispanic: 52% SED: 80% SWD: 62% White: 65.00%
1.2	% of grade 2-8 students meeting/exceeding grade level norms on NWEA MAP Mathematics assessment	Schoolwide: 60.4% Hispanic: 54.0% Other: 65.7%			2023-2024 NWEA Math Schoolwide: 68% Hispanic: 68% White: 68%	Schoolwide: 65.0% Hispanic: 57.0% Other: 67.0%
1.3	% of grade 3-8 students meeting/exceeding standards on the ELA SBAC	Schoolwide: 69.28% Hispanic: 63.34% SED: 68.42% SWD: 68.18% White: 74.00%			2023-24 SBAC ELA Schoolwide 61.09% Hispanic: 65.22% SED: 51.64% SWD: 50.00% White: 64.18%	Schoolwide: 72.0% Hispanic: 66.0% SED: 71.0% SWD: 71.0% White: 77.0%
1.4	% of grade 2-8 students meeting/exceeding grade level norms on NWEA MAP Reading assessment	Schoolwide: 74% Hispanic: 71% Other: 75%			2022-2023 NWEA Reading Schoolwide: 74% Hispanic: 73% White: 74%	Schoolwide: 77.0% Hispanic: 75.0% Other: 78.0%

Actions & Measuring and Reporting Results

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
1.1	<p>Streamlined Assessment Plan 2024-25 We will continue to implement our current assessment plan which specifies implementation of the following assessments; NWEA Map, CAASPP, IABs, Dibels, Spelling Inventory, Writing Assessment, Math Facts Fluency and our SEL survey. We will continue to assess students at the beginning and end of year following this plan. Teachers will be required to give 2 IABs per month (one for math and one for ELA) beginning in January to prepare students for the CAASPP - a total of 6 IABs will be given. We will also create benchmark mini-assessments for teachers to utilize in their classrooms once a month so we can monitor progress more closely. This plan will also include structured testing times and designate students to test with specified staff members. The costs associate with this might include NWEA, Spellography curriculum, OTUS for processing the SEL data, and potentially paying a staff member to develop new writing assessments, score assessments or manage data.</p>	No	Partially Implemented	<p>The following information is the percentage of completed assessments overall:</p> <ol style="list-style-type: none"> 1) NWEA MAP - 99% 2) DIBELS assessment - 95% 3) SEL assessments - 98% 4) Spelling assessment - 99% 5) Basic Math assessment - 92% 6) Writing Benchmark assessment - 98% 7) CAASPP - 99% 	<p>The IA assessment plan</p> <p>Initial Assessments:</p> <ol style="list-style-type: none"> 1) NWEA Measure of Academic Progress 2) DIBELS 3) SEL assessment 4) Spelling assessment 5) Basic Math Assessment 6) Writing Benchmark Assessment <p>Mid-Year</p> <p>All students who are eligible to test for the state tests use the Interim Assessments produced by the CDE to learn test taking strategies and practice the test format.</p> <p>All students have taken all of the assessments that are a part of our</p>	\$9,000.00	\$11523.75

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
					assessment plan.		
1.2	<p>Support for Academic Instruction 2024-25 We will analyze our CAASPP and MAP data by the end of September for any trends. We will use our other in-house assessment data to find patterns and areas of need. Based on the areas of identified need, we will tailor professional development in staff meetings and collaboration meetings to give all teachers the tools to best support their students in addressing these deficits. We will also seek professional development for teachers whose practices excel student growth to help facilitate mentorship within the school. The costs associated with this actions might involve curriculum resources, stipends, outside trainers, software for assessment analysis and NWEA. We will provide professional development to continue to unify our staff around our mission.</p>	No	Partially Implemented	<p>August 28th: Teachers went over how to administer the MAP test, how to administer the DIBELS test and how to score the DIBELS</p> <p>September 18th: Teachers were entering assessment data and going over what the results meant in the context of their classroom.</p> <p>October 9th: Teachers looked at last years CAASPP assessment data and brainstormed ways to improve instruction in their classrooms based on the deficits they're seeing.</p> <p>December 2nd: Teachers learned how to administer the IABs and what the information will mean. We also brainstormed ways to do "test prep" in class that isn't a worksheet or following a script.</p>	<p>Our weekly collaborative meetings during which grade level spans K-2..3-5 and 6-8 meet to share best practices, review beginning of the year assessments and discuss their use of the Interim Assessment Blocks test preparation materials.</p> <p>Teachers new to IA participated in training for assessments prior to giving them. Teachers are observed and given feedback. Additionally, teachers new to IA who were struggling at the start of the year</p>	\$17,000.00	\$42217.75

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
				January 22nd: Teachers gave 2 IABs to their classes by this date, then they reviewed the results together.	were provided contracted mentors to help them align and improve their practice.		
1.3	<p>Data Analysis, Reflection and Tracking 2024-25 We will hold one collaborative meeting each month (August to March) that will be specifically designated for analyzation of student work, assessments, formative assessments and classroom observation data. Data gathered will be used to create a plan for improvement. Teachers will track this progress and create action items for students in a shared document that will be updated weekly. Teachers will have access to support staff, resources, trainings and other support providers in order to address the concerns highlighted on their tracking document. The EL and Title 1 coordinator will be involved and specifically tracking services and progress for students in these communities. Each quarter, students who have not made progress will be given an individual plan through the SST process. The associated costs for this might include staff support for tracking and monitoring, SST coordinator costs, support staff costs, developing or purchasing resources to support specific student needs.</p>	Yes	Partially Implemented	<p>According to the SEL data the beginning of the year the following trends were noticed: 70% of our K-2 students felt they have good social awareness while only 58% of our 3-8th graders felt that they had strong social awareness. 74% of our K-2 students felt they make responsible decisions while at school, while only 25% of our 3-8th graders felt they make responsible decisions at school. 68% of our K-2 students felt they could manage their emotions and behavior reasonably well, while only 34% of our 3rd-8th grade students felt they could. manage their emotions and regulate their bodies well. Because of these results, we've utilized a support teacher who has been observing students who were marked low in particular areas of concern and who's teachers expressed needed extra support. This support teacher has</p>	<p>Social emotional data included a social emotional assessment, teacher observations, counselor observations, and teacher assistant input. Identified students received support based on their identified need. A specific non-classroom based teacher provided a variety of structured support for those students which included in class support, lunch time groups, playground support and some pull out support.</p>	\$81,000.00	\$26479.10

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
				developed lunch bunch groups where kids work on target skills, coping strategies and other methods to help them build more resilience in these particular areas.			
1.4	Intervention Plans 2024-25 We will create opportunities during August professional development and once a month for teachers to review and learn intervention strategies and techniques that should be used with students who are not achieving at grade level. These strategies and techniques will be tracked in the weekly data tracker to show actions and steps taken towards supporting students. Students who do not meet academic goals or show some improvement will be recommended to start the SST process. The associated costs that this action item might occur will be paying the SST coordinator, developing and collecting resources for intervention, and paying outside support providers to offer professional development for teachers.	Yes	Fully Implemented	August 14th: Teachers learned about Math workshop routines, best practices for math instruction and went over the IM math curriculum. August 15th: Teachers were trained in using Thinklaw. Teachers were also given a training on how to differentiate work for students, and how to get more interventions for struggling student. August 28th: Teachers went over how to administer the MAP test, how to administer the DIBELs test and how to score the DIBELs September 18th: Teachers were entering assessment data and going over what the results meant in the context of their classroom. October 9th: Teachers looked at last years CAASPP assessment data and brainstormed	Teacher were given additional planning time this year. Part of that time is designated to collaboratively address student needs. All of our teacher partners worked closely together in their designated shared planning time to provide each other support to address specific student needs. Professional development was provided to all teachers for assessment, analyzing student scores, curriculum and use of technology. A support teachers was designated to identify students who were in need of support	\$111,000.00	\$1882.38

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
				<p>ways to improve instruction in their classrooms based on the deficits they're seeing.</p> <p>October 23rd: Teachers were collaborating about the Reading program we use UFLI.</p> <p>December 2nd: Teachers learned how to administer the IABs and what the information will mean. We also brainstormed ways to do "test prep" in class that isn't a worksheet or following a script.</p> <p>January 22nd: Teachers gave 2 IABs to their classes by this date, then they reviewed the results together.</p> <p>February 12th: Teachers watched a recording of themselves teaching and scored themselves on a rubric aligned with the mission of our school. Then met with assistant director to give feedback and improve instruction in a one-on-one setting.</p>	<p>and not already part of a plan. Teacher tutors were provided for specific students.</p>		

Goal 2

Goal Description

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.

Expected Annual Measurable Objectives

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
2.1	Percentage of teachers that are appropriately credentialed for the students they are assigned to teach.	100% of classroom teachers hold a multiple subject teaching credential. 75% of enrichment teachers hold a specific area credential			100% of classroom teachers hold a multiple subject teaching credential 85% of enrichment teachers hold a specific area credential	100% of classroom and enrichment teachers hold a credential in their area of assignment.
2.2	Percentage of Students with Disabilities who are in the general education program at least 80% of the instructional day.	100% of students with disabilities are in the general education program over 80% if the instructional day			100% of students with disabilities are in the general education program over 80% of the instructional day	100% of students with disabilities are in the general education program over 85% if the instructional day
2.3	Suspension rate	0.2% schoolwide suspension rate			0.4% schoolwide suspension rate	0% schoolwide suspension rate
2.4	Expulsion rate	0% schoolwide expulsion rate			0% schoolwide expulsion rate	0% schoolwide expulsion rate
2.5	Percentage of students who feel connected/part of their school	According to the September 2023 in house Social Emotional Survey: 62% of students scored 80% or higher in the social awareness category 57% of students scored 80% or higher in the responsible decision making category			According to the September 2023 in house Social Emotional Survey, 54% of students scored 80% or higher in the social awareness category, 32% of students scored 80% or higher in the responsible decision making category, 60% of students scored 80%	Based on SEL survey: 70% of students score 80% or higher in the social awareness category 65% of students score 80% or higher in the responsible decision making category 60% of students score 80% or higher in the self awareness category

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
		50% of students scored 80% or higher in the self awareness category 51% of students scored 80% or higher in the relationship skills category 57% of students scored 80% or higher in the self management category.			or higher in the self awareness category, 56% of students scored 80% or higher in the relationship skills category, and 39% of students scored 80% or higher in the self management category.	60% of students score 80% or higher in the relationship skills category 65% of students scored 80% or higher in the self management
2.6					TBD: We are starting the conversations with teachers about their life plans.	

Actions & Measuring and Reporting Results

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
2.1	Incident Tracking Program 2024-25 We will either create, purchase or utilize an already existing software so that staff can track behavioral incidents that occur in their classrooms and on the playground. We will insure that procedures for doing so are documented and that there is accountability for accurate and consistent documentation. We will provide a short period of time during each collaboration meeting for staff to update and communicate about any possible concerns. The associated costs that could accompany this action are paying a staff member to monitor tracking and follow up with teachers/staff,	No		100% of teachers are trained in Responsive classroom and Positive discipline before the beginning of the school year. All of our 1st, 2nd, and 3rd grade teachers were trained in a Beast Academy professional development before the year started for 2 days, and then were given more training on implementation 2 other times throughout the year.	All teachers and teacher assistants were provided some level of Positive Discipline training. All new teachers were provided the Responsive Classroom training in a format that allowed them to connect and collaborate with each other prior to the start of the school year.	\$19,000.00	\$11248.54

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
	the potential cost of software and trainings to support staff in utilizing techniques and strategies for interventions.			<p>100% of teachers are trained in positive discipline</p> <p>All TAs were given an orientation before the school year started training them on their responsibilities and roles for the year. They also take part in weekly meetings where we do professional development to improve their skills.</p>	<p>All teachers were provided a flow chart of behavioral interventions and guidance to follow it. Our ELL and Title 1 support teacher provided packets and instructions for best practices to all teachers with ELL needs. Our teacher assistants attended a special education training offered by our SELPA.</p>		
2.2	<p>Monitoring Student Work 2024-25 This action is to align student work with report cards and to create a consistent school structure for portfolio assessment. We will create a protocol for collecting work each week (one core subject per week). Work will then be placed in a portfolio. Portfolio work will be used to develop grades on report cards, to demonstrate student growth and to track improvement in core subject areas throughout the year. Basic requirements for portfolios will be established. With the establishment of this protocol, we plan to redesign our report cards into a point system that will identify</p>	No	Partially Implemented	<p>Teachers have been observed every semester at least once.</p> <p>Teachers who were identified as "struggling" at the beginning of the year were given intensive coaching, support and other professional development opportunities throughout the year to help improve their teaching skills.</p> <p>The assistant director participated in a Targeted Feedback training that then led to</p>	<p>Teachers are given permission to request a substitute or use their planning time to observe each other. Our assistant director is in classes daily observing, providing feedback and providing support to teachers with</p>	\$25,000.00	\$122.37

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
	clear designation of mastery or not. The cost associated with this action item might include a software system to store grades/report card data, a digital platform to store portfolio work, and physical supplies to store portfolio work.			<p>new observation method that will allow for all teachers to be officially observed once per quarter at the very least.</p> <p>We hired Thrive to help with observations of the school at the beginning of the year. They gave feedback and suggestions for specific teachers as well as whole school feedback and coaching.</p>	struggling students. Teachers have made videos of their teaching and reviewed it with the assistant director who took their suggestions for areas they would like to improve.		
2.3	<p>Middle School Redesign 2024-25 We will restructure our middle school in order to allow for more inquiry based learning and project based learning to take place as well as increase motivation and to grow academic rigor. This restructuring will allow for teachers to become responsible for two subject areas rather than all subject areas. By using this format, we hope to attract more middle school candidates that can execute our projects and make them a reality. This restructure will also create more independent learners who are critical thinkers. The associated cost with this goal might include staff salaries, standards-based projects, field study opportunities, guest speaker fees, and materials needed to execute the projects.</p>	No		<p>Teachers have collab time every week that is dedicated to addressing grade level band topics. Teachers are encouraged to observe each other and are given coverage to observe teachers if they voice that as a request or are told they would benefit from observing.</p> <p>Our special education staff has attended numerous SELPA professional development opportunities as well as SELPA sponsored conferences.</p>	All teachers were observed by outside mentors and 5 teachers were chosen to receive 1:1 coaching from outside mentors at the start of the school year. All teachers made videos of their teaching to review with a coach. All teachers have received feedback when they have been observed.	\$15,000.00	\$17329.42

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
2.4	<p>Professional Development 2024-25 Educators deserve to be supported in a variety of ways and deserve to continually grow, learn, develop their practice, set goals and receive training. All students deserve teachers who are well trained and equipped to manage the complex dynamics of classroom learning. Training and professional development will be provided to equip our staff and teachers with proactive techniques and methods rather than reactive interventions. We will utilize collaboration time and staff meetings to provide mentoring and share best practices. We will seek and provide professional development as needs arise. The associated costs for this action might include, stipends, curriculum, specialists/trainers, and conferences.</p>	Yes		<p>100% of our salaried staff have access to dental, vision and medical benefits 100% paid for by the school</p> <p>100% of our salaried staff dependents are offered full benefits at 90%</p> <p>100% of our married salaried staff spouses are offered full benefits at 50%</p> <p>Staff planning time provided during the work day has increased for all grade levels.</p> <p>100% of staff participate in weekly meetings with the director, have access to observation time of other teachers, have access to resources for their classroom activities and lessons, have support of a teacher assistant, have access to support from our school counselor.</p>	<p>A salary scale was set that was aligned with the district salary scale prior to their 15% bonus. 100% of teachers receive medical, dental and vision benefits at no charge for themselves, at 90% paid for dependents and 50% paid for spouse. Teachers received 4-5 hours of planning time per week.</p>	\$42,000.00	\$19650.11
2.5				<p>August 28th: Teachers went over how to administer the MAP test, how to administer the DIBELS test and how to score the DIBELS</p> <p>September 18th: Teachers were entering assessment data and</p>	<p>All of the professional development provided during the school year has included an academic component. The special education staff</p>		\$2782

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
				<p>going over what the results meant in the context of their classroom.</p> <p>October 9th: Teachers looked at last years CAASPP assessment data and brainstormed ways to improve instruction in their classrooms based on the deficits they're seeing.</p> <p>December 2nd: Teachers learned how to administer the IABs and what the information will mean. We also brainstormed ways to do "test prep" in class that isn't a worksheet or following a script.</p> <p>January 22nd: Teachers gave 2 IABs to their classes by this date, then they reviewed the results together.</p>	<p>analyzed testing data for students with IEPs to identify strengths in our program.</p>		

Goal 3

Goal Description

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

Expected Annual Measurable Objectives

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
3.1	Students and teachers with access to standards-based instructional materials. Number of core subject areas with CCSS, NGSS, ELD, Social Science standards-aligned curricula	100% of students and teachers have access to instructional materials that support high academic instruction 5/5 subject areas curricula aligns with CCSS, NGSS, ELD, and Social Science standards			100% of students and teachers have access to instructional materials that support high academic instruction	100% of students and teachers have access to quality standards aligned resources in all subject areas.
3.2	All students will access field trips that are meaningfully connected to learning, guest experts and quality enrichment classes	Average number of field trips and guest speakers per grade level are 12 in the 2023-2024 school year			Average number of field trips mid year = 5 per class	Minimum number of field trips tied to academics are 6 per year per class and 1 expert per project. 100% of students access 2 enrichment classes weekly.
3.3	Percentage of facilities that are in "good repair"	100% of facilities are in good repair			5/5 subject areas curricula aligns with CCSS, NGSS, ELD, and Social Science standards	100% if facilities are in good repair.
3.4	Social Emotional Support and Curriculum	Accumulated activities for SEL lessons			100% of facilities are in good repair	An organized library of activities with a set timeline for implementation throughout the year.
3.5	Teacher Retention Rate	78% of credentialed staff are staying at IA following the 2023-24 school year.			2 climbing structures are fully installed and in use. Additionally, we have added a slide and gaga pit.	85% of credentialed staff stay for the following year.

Actions & Measuring and Reporting Results

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
3.1	<p>High Quality Curriculum Resources 2024-25 Teachers will have access to at least 2 high quality, standards based resources for each subject area from which to create their own curriculum and projects for class. These will continue to build and develop our project library that will incorporate rigorous standards based resources and activities so that there are ultimately four projects per grade level as options for future teachers. We will continue to extend our implementation of the Beast Academy curriculum to our K-5 classrooms over the next few years. We expect that by the year 2027, all classrooms (K-5) will be using the Beast Academy curriculum, and online support software. Beast Academy staff will train, collaborate and offer feedback to teachers as they apply this program to their every day classrooms. The associated costs for this action might include paying staff to participate in extra trainings, the possible purchase of curriculum and resources and any materials needed for Beast Academy.</p>	No	Fully Implemented	<p>Beast Academy online replaced STMath for our 1st-3rd grades in order to stay balanced with screen time.</p> <p>Teachers select software for their students based on need not on requirements placed on them.</p> <p>At least one message per month is informative for parents about the impact of screen time.</p> <p>Our classrooms all have access to a software application that allows them to lock down student chromebooks for specific website access.</p> <p>We have alert filters to inform staff of questionable student searches.</p>	<p>IA teachers have continued to decrease the amount of screen time for our students in light of the increasing use of technology of our students outside of school hours. Teachers discussed and selected software to be used in their classrooms based on the grade level and academic needs of their students. Programs we have found valuable are STMath, Quill, Mystery Science, Google Classroom and Reading Eggs.</p>	\$30,500.00	\$16646.38
3.2	<p>Students will access field trips, guest experts and quality enrichment classes 2024-25 Interactive inquiry and projects involve extending learning</p>	Yes	Fully Implemented	No teachers have been denied access to any materials requests this year. On average,	Innovations Academy does not expect teachers to supply their own	\$62,000.00	\$19,680.18

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
	outside the classroom. All students will have access to field trips that support their learning. Experts in various fields of study will be included in all projects. Our students will access enrichment classes each week. The costs to implement this action might include fees associated with experts, costs for bus maintenance and use, costs of entrance to venues, materials and supplies for enrichment classes and salaries of enrichment teachers.			requests are filled within a week. 100% of teachers and students have required materials for instruction in core subjects. 100% of curriculum choices made by administration receive staff input prior to selection.	classrooms. This includes materials for projects and science materials. There is an exclusive email to which teachers can send materials requests.		
3.3	Facility Costs 2024-25 Cost of facility maintenance: Utilities, HVAC services, filter changes, landscaping, trash and recycling, building lease, oversight fee, cleaning, maintenance and repair, as well as upgrades.	No	Fully Implemented	The Innovations Academy facility is well maintained with regular maintenance and upkeep.		\$3,097,000.00	\$155,411.80
3.4	Social and Emotional Curriculum 2024-25 Innovations Academy began implementation of our own internally developed SEL program in 2008. It is time to reorganize resources and streamline our SEL program. We will select activities that meet specific SEL objectives and create a timeline for the school year. The associated cost for this action might include staff time, resources and curriculum.	No	Fully Implemented	All materials have been purchased. The playground has two compliant play structures in place. New fencing has been added to protect plants on our nature based playground.		\$15,000.00	\$5,195.85

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
3.5	<p>Teacher Salaries and Benefits 2024-25 We will continue to use our funds to offer competitive salaries in order to attract and retain qualified teachers. We will look at our benefit options each year to make sure they are competitive and address teachers' needs. The associated costs with this will include teacher salaries and costs associated with benefits.</p>	No		<p>7/9 grade levels are on target to meet the 1 field trip per month goal. 50 different field trip locations have been visited.</p> <p>A bus and bus driver are available for field trip transportation.</p> <p>The expenditures in this category are for paying for students to attend field trips.</p> <p>Parent chaperones that drive on field trips have the ability to request reimbursement for gasoline.</p>	<p>Field trip locations are too numerous for this space. All students are welcomed on the field trip, and in fact, are expected to go as field trip learning is incorporated into the academic plan.</p>	\$2,500,000.00	\$1,256,000.00

Goal 4

Goal Description

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

Expected Annual Measurable Objectives

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
4.1	Percentage of parents who open ParentSquare communications regarding absences.	100% of parents are contactable via ParentSquare ___% view messages received from Innovations			P-1 ADA 23-24 is 96.5%	
4.2	Percentage of students attending 96% of school days	84.8% of students attended 96% or more of school days in 2023-24			72% of staff attended 96% or more school days.	95% of students attend 96% of school days.
4.3	Percentage of students who are chronically absent (defined as missing 10%)	11.7% of students were considered chronically absent during the 2022-2023 school year - will update final percentages of the 2023-24 school year once the year has ended.			7% of students were chronically absent in the first part of the 23-24 school year.	5% of students considered chronically absent
4.4	Number of students attending make up time per week	new action and metric, no baseline				Data would show a decrease in students assigned to make up work overtime as absenteeism as chronic absenteeism goes from 11%- 5%
4.5	Percentage of staff attending 96% of school days	63% of staff attended 96% or more school days in 2023-24				75% of staff attend 96% or more school days

Actions & Measuring and Reporting Results

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
4.1	<p>Whole School Absence Communication 2024-25 We will be sharing absence data weekly with families so they can stay informed about the trends we are seeing in regards to absences. This will include weekly communication through Parent Square as well as using a sign visible in the drop off and pick up line to share percentages of students attending school each day. Teachers will share information about absence percentages in their weekly communication to families. The associated costs with this might include ParentSquare, and any costs associated with the upkeep of the sign board.</p>	No	Partially Implemented	<p>We have contacted 100% of families with chronically absent students. Meetings (telephonic and in person) have been held the parents of 11 of the students. Our ADA is higher than the two previous years, though not as high as pre-pandemic.</p>	<p>We followed a parent suggestion to post the attendance out front for the previous day. We have supported parents with carpools when they are struggling with transportation</p>	\$5,125.00	\$3000.00
4.2	<p>Absence Follow Up 2024-25 We will create a communication and follow up protocol for any student that is absent each week, as well as students who fall within the threshold of being chronically absent at any point in the year. Each week, we will call families of absent students who neglect to notify the school. Once a student crosses the threshold of chronic absenteeism, the director will call to emphasize the importance of attendance. Once that phone call has been made, we will monitor their attendance. We will hold quarterly mandatory meetings for all families of chronically absent students to attend. The associated</p>	No	Partially Implemented	<p>We have contacted 100% of families with chronically absent students. Meetings (telephonic and in person) have been held the parents of 11 of the students. 100% of families of excessively absent students have received letters with information and support for improvement.</p>	<p>We followed a parent suggestion from our advisory meeting to post the attendance out front for the previous day.</p>	\$8,000.00	\$\$3500.00

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
	cost with this action item might include staff salaries who are helping with communication and meetings as well as possible software for monitoring attendance.						
4.3	<p>Absent Student Support 2024-25 We will closely monitor student absences weekly and provide mandatory make up work and a time during the school day when the work will be completed. We will select specific times for make up work such as Monday electives, end of the day and other flexible schedule times for students with recent absences. The associated costs with this action item might include educational software such as ST Math, Reading Eggs, Reflex Math, etc.</p>	No	Partially Implemented	<p>No software has been purchased to aid in attendance monitoring beyond our Student Information System (Powerschool).</p> <p>In depth attendance messages on the weekly communication have been included in messages sent on August 13, September 3, October 8 and December 31.</p> <p>Reminders about the importance of attendance have been sent within 100% of weekly communications to parents.</p> <p>Attendance was addressed at the Parent Advisory meeting on Jan 24</p> <p>Letters were sent directly to all parents with excessive absences during the week of Jan 7-Jan 14.</p>		\$5,000.00	\$7084.77

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
4.4	<p>Teacher/ Staff Attendance 2024-25 We will alter our calendar adding one extra vacation week and days in front of winter break to allot for staff travel as requested by teachers. Our goal is for teachers to focus their days off on regularly scheduled breaks. Additionally we will shorten August professional development to lengthen summer break based on teacher input. We will also include more opportunities through out the year to appreciate staff with coffee, treats, and activities. We will be using one staff meeting a month to create team building activities for staff to participate in. The associated costs with this action item might include food, drinks, supplies and other materials.</p>	No				\$1,000.00	\$300.00

Goal 5

Goal Description

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

Expected Annual Measurable Objectives

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
5.1	Weekly director communications and weekly teacher communications with parent education, financial information and school event information	In the 2023-24 school year 42 director messages were sent. 50% contained parent education, 100% contained school information and 0% contained financial information				One message per week of school, 75% contain education, 100% contain school information and 3 messages contain financial updates
5.2	Number of school trainings for parents on academic and social emotional initiatives	A parent education seminar was included as part of our Parent Advisory meeting in which 10 different options were offered to parents for sessions pertaining to IA philosophy and curriculum and open to 100% of IA families. Babysitting was free. 2 sets of 10 sessions each were offered free of charge for parents to participate in the S.P.A.C.E. program during the 23-24 school year. One Positive Discipline seminar was offered.			A parent education seminar was included as part of our Parent Advisory meeting in which 10 different options were offered to parents for sessions pertaining to IA philosophy and curriculum and open to 100% of IA families. Babysitting was free.	An annual combined parent advisory, LCAP and parent education seminar will be held. One parent education opportunity will be offered regarding parenting.
5.3	Parent Connection meetings	5 Parent Connections meetings are scheduled for this			5 Parent Connections meetings are scheduled for this	A minimum of five Parent Connection meetings will be held

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2026-2027
		school year remotely. 5 meetings are scheduled this year in person. They take place every other month.			school year remotely. 5 meetings are scheduled this year in person. They take place every other month.	yearly. Parents will be given at least three opportunities to volunteer.

Actions & Measuring and Reporting Results

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
5.1	<p>Parent Communication 2024-25 The director's weekly messages through our school platform (ParentSquare) will be organized in a predictable and consistent format. Messages will include quarterly updates on LCAP including spending and additionally provide information on fundraising events. This communication will also highlight any important school wide events and upcoming deadlines pertinent to families plus provide parent education on how to support their child at home. Teachers will also share a weekly communication update similarly with a predictable format and timing that includes information on deadlines, family events, classroom subject matter being covered and recommendations for how families can support their student. The associated costs with this action will include the ParentSquare fee for subscribing as all family communication takes place through parent square.</p>	No	Partially Implemented	<p>Spending information has not been sent to parents with the exception of this midyear LCAP report.</p> <p>A parent education seminar was included as part of our Parent Advisory meeting (1/11) in which 10 different options were offered to parents for sessions pertaining to IA philosophy and curriculum.</p> <p>All parents/guardians were invited to an Open House prior to the commencement of the school year. All parents were invited to attend a Student Led Conference (10/2-10/4) with their child pertaining to academic progress. All parents/guardians were invited to an Exhibition of</p>			\$8,504.08

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
				<p>student work on January 11th.</p> <p>A Family Math night was held on 9/21.</p> <p>A student theater performance took place 12/7-12/9.</p> <p>We held an October Carnival on 10/27.</p>			
5.2	<p>Parent Engagement through Education</p> <p>2024-25 Two Exhibition Nights will be held which will coincide with student portfolio work reviews, one at the end of first semester and the other just before spring break. Parent education in the form of how to review portfolio work will be provided. Parents will have access to student portfolios throughout the year. We will also utilize Open House as a time for parents to both view classrooms and participate in educational opportunities. For additional parent education, we will offer S.P.A.C.E. training for parents of anxious children and 2 Positive Discipline classes. 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.</p>	No	Partially Implemented	<p>Spending information has not been sent to parents with the exception of this midyear LCAP. An early LCAP survey was sent to all families on 1/28 and 2/4.</p> <p>A parent education seminar was included as part of our Parent Advisory meeting in which 10 different options were offered to parents for sessions pertaining to IA philosophy and curriculum, including a Positive Discipline introduction.</p> <p>All parents/guardians were invited to an Open House prior to the commencement of the school year. All parents were invited to attend a Student Led Conference (10/2-10/4) with their child pertaining to academic progress. All parents/guardians were</p>		\$20,000.00	\$4000.00

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
				<p>invited to an Exhibition of student work on January 11th.</p> <p>A Family Math night was held on 9/21.</p> <p>A student theater performance took place 12/7-12/9.</p> <p>We held an October Carnival on 10/27.</p> <p>Extensive social emotional curriculum</p> <p>Informational messages were included in 5 weekly parent communications between 8/27 and 10/1.</p>			
5.3	<p>Parent Connection</p> <p>2024-25 IA staff will work closely with the Parent Connection (our parent organization) throughout the year to consistently increase parent participation. We will work with the Parent Connection to create a school calendar with events that serve our family population. Meeting times and agenda will be shared with all families ahead of time while also including other ways for families to get involved other than going to a meeting.</p>	No		This goal is covered by expenses, such as ParentSquare and director time, that are accounted for in other actions.		0	\$0

Impact to the Budget Overview for Parents

Item	As adopted in Budget Overview for Parents	Mid-Year Update
Total LCFF Funds	4,826,586	4,595,308
LCFF Supplemental/Concentration Grants	275,095	239,566

Innovations Academy

January 2025



Paid Media Overview

Key Metrics

- Impressions — The number of times your ads were shown
- Clicks — The number of times users clicked on your ads
- Click-Through-Rate (CTR) — The percentage of users who saw an ad and clicked on it
- Conversions — The number of times someone who saw an ad performed our goal action (completing a form or calling the school)
- Conversion Rate — The percentage of users who saw an ad and converted

Paid Media Overview

How are our online advertising campaigns performing?

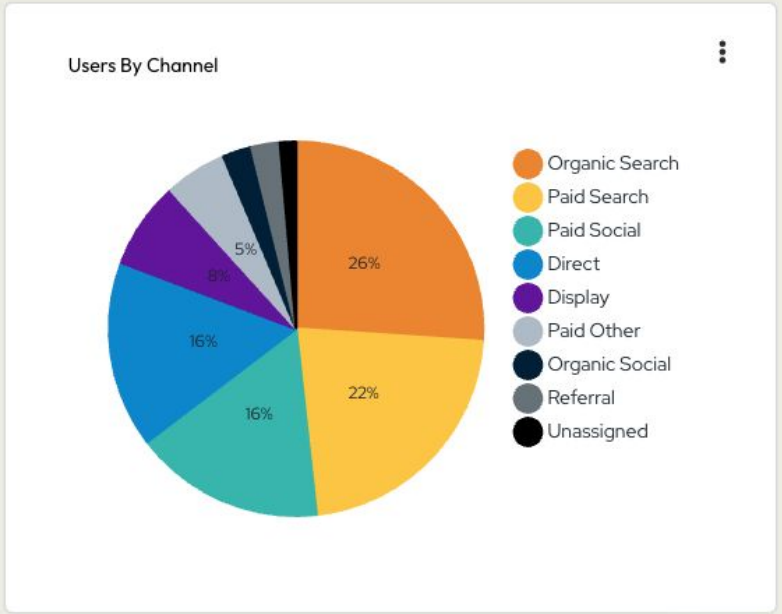
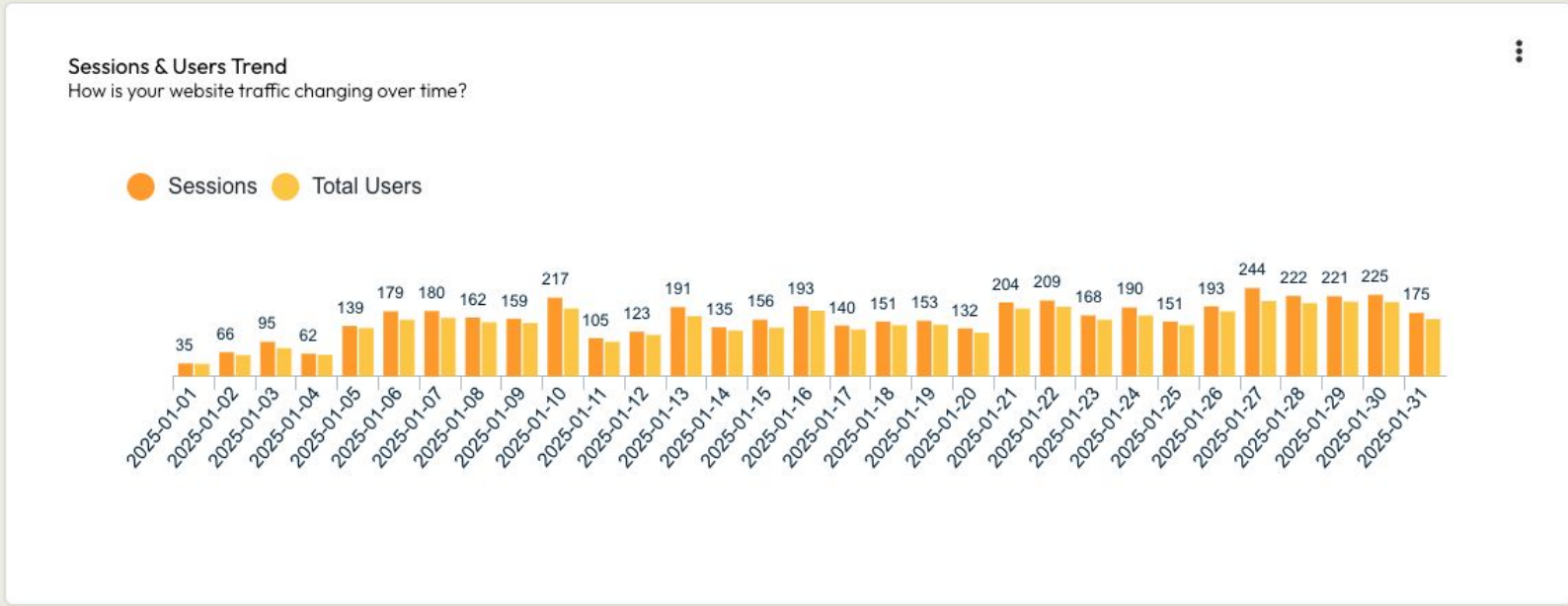
Search	Impressions	Clicks	CTR	Conversions	Conversion Rate
Search	71,337	925	1.30%	17	1.84%
Meta	156,050	2,003	1.28%	0	0.00%
Multi-channel	3,642	202	5.55%	10	4.95%
Display	25,473.00	471	1.85%	0.00	0.00%
	256,502	3,601	1.40%	27	0.75%

Key Takeaways

- Our campaigns launched in early January. Channels include Google Search, Meta (Facebook and Instagram) and multichannel advertising including Display and other programmatic placements.
- In January, ads were seen a total of 256,502 times and drove 3,601 clicks. These clicks led to 27 conversions (interest forms via the website and phone calls from ads).
- We are taking steps to optimize campaigns but we are pleased with these initial results, especially given the time of year

Website Traffic - January vs. prior month

<p>Sessions</p> <p>4,982</p> <p>% change 158.94%</p> <p>A session is a period of time during which a user interacts with your website.</p>	<p>Users</p> <p>4,511</p> <p>% change 175.57%</p> <p>The number of people who started a session on your website.</p>	<p>New Users</p> <p>3,719</p> <p>% change 207.10%</p> <p>The number of people who visited your website for the first time.</p>	<p>Bounce Rate</p> <p>56.99%</p> <p>% change 26.75%</p> <p>Percentage of users who spent less than 10 seconds on-page and did not engage or view other pages.</p>	<p>Avg. Session Duration</p> <p>00:02:06</p> <p>% change -37.12%</p> <p>Percentage of users who spent less than 10 seconds on-page and did not engage or view other pages.</p>	<p>Website Leads</p> <p>67</p> <p>% change 0.00%</p> <p>The number of unique users who completed an interest or enrollment form.</p>
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Website Traffic - January vs. prior month

Channel Performance

Which channels drive the most visits and engagement?

Default Channel Grouping	Sessions	% Δ	New Users	% Δ
Organic Search	1,381	28.23%	799	18.72%
Paid Search	1,083	26975.00%	932	23200.00%
Direct	836	26.48%	535	24.71%
Paid Social	749	3304.55%	708	3118.18%
Display	374	884.21%	329	1395.45%
Paid Other	250	12400.00%	217	10750.00%
Referral	129	89.71%	89	85.42%
Organic Social	118	210.53%	110	243.75%
Unassigned	62	19.23%	0	-100.00%

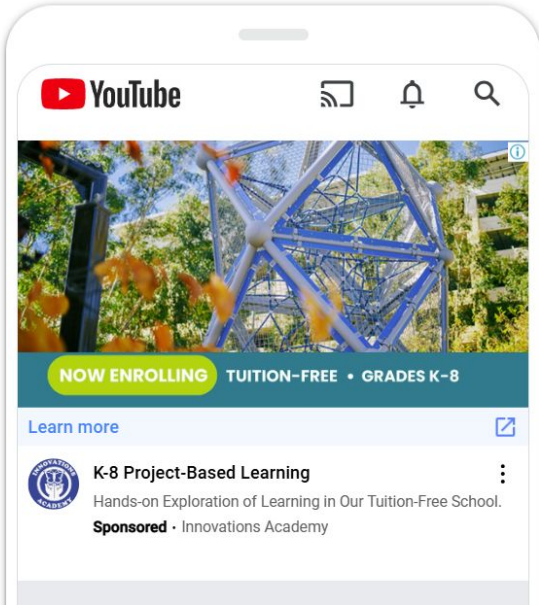
- Direct — Users who type in your site URL or a visit where the source is unknown
- Organic Search — Users who find your site via (unpaid) search engine results (e.g. Google, Bing)
- Paid Search — Traffic driven by PPC (Pay-Per-Click) search advertising
- Referral — Users who clicked a link from another site (excluding search)
- Organic Social — Visits from social media networks such as Facebook and Instagram
- Display — Traffic from display advertising (e.g. banner ads)
- Paid Other — Traffic from online ads other than search and display, such as video

Key Takeaways

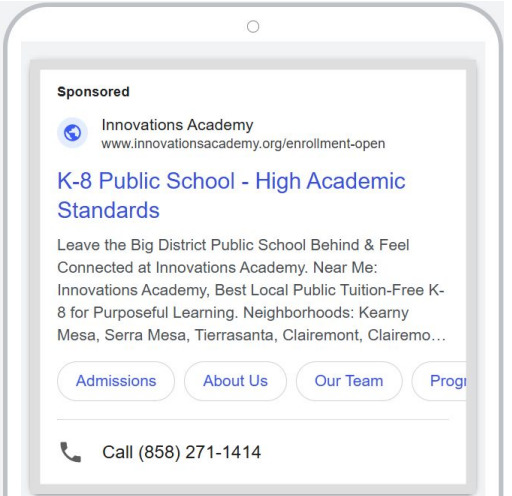
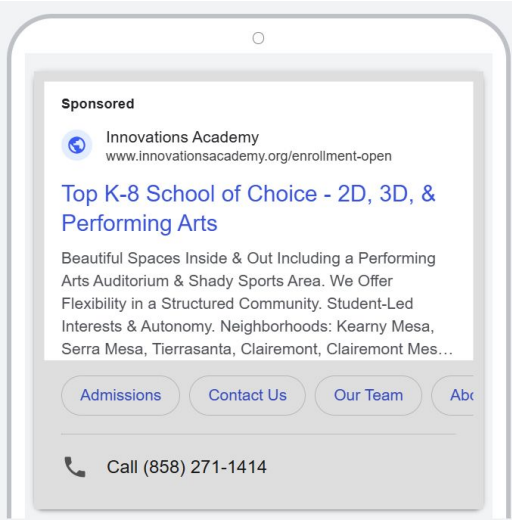
- Organic search is the top source, this increased 28% month over month
- Paid search and paid social launched at the beginning of the month are already the second and fourth highest traffic sources

Paid Media in Action

Multichannel ad



Google Search ads



Meta ad



Display ad



Title IX, Harassment, Intimidation, Discrimination and Bullying Coordinator (“Coordinator”):

Christine Kuglen
Executive Director
5454 Ruffin Rd, San Diego, CA 92123
858-271-1414
christine@innovationsacademy.org

Definitions

Prohibited Unlawful Harassment

- Verbal conduct such as epithets, derogatory jokes or comments or slurs.
- Physical conduct including assault, unwanted touching, intentionally blocking normal movement or interfering with work or school because of sex, race or any other protected basis.
- Retaliation for reporting or threatening to report harassment.
- Deferential or preferential treatment based on any of the protected characteristics listed above.

Prohibited Unlawful Harassment under Title IX

Title IX (20 U.S.C. § 1681 *et seq.*; 34 C.F.R. Part 106) and California state law prohibit discrimination and harassment on the basis of sex. In accordance with these existing laws, discrimination and harassment on the basis of sex in education institutions, including in the education institution’s admissions and employment practices, is prohibited. All persons, regardless of sex, are afforded equal rights and opportunities and freedom from unlawful discrimination and harassment in education programs or activities conducted by IA.

IA is committed to providing a work and educational environment free of sexual harassment and considers such harassment to be a major offense, which may result in disciplinary action. Inquiries about the application of Title IX and 34 C.F.R. Part 106 may be referred to the Coordinator, the Assistant Secretary for Civil Rights of the U.S. Department of Education, or both.

Sexual harassment consists of conduct on the basis of sex, including but not limited to unwelcome sexual advances, requests for sexual favors and other verbal or physical conduct on the basis of sex, regardless of whether or not the conduct is motivated by sexual desire, when: (a) Submission to the conduct is explicitly or implicitly made a term or a condition of an individual’s employment, education, academic status, or progress; (b) submission to, or rejection of, the conduct by the individual is used as the basis of employment, educational or academic decisions affecting the individual; (c) the conduct has the purpose or effect of having a negative impact upon the individual’s work or academic performance, or of creating an intimidating, hostile, or offensive work or educational environment; and/or (d) submission to, or rejection of, the conduct by the individual is used as the basis for any decision affecting the individual regarding benefits and services, honors, programs, or activities available at or through the educational institution.

It is also unlawful to retaliate in any way against an individual who has articulated a good faith concern about sexual harassment against themselves or against another individual.

Sexual harassment may include, but is not limited to:

- Physical assaults of a sexual nature, such as:
 - Rape, sexual battery, molestation or attempts to commit these assaults.
 - Intentional physical conduct that is sexual in nature, such as touching, pinching, patting, grabbing, brushing against another's body, or poking another's body.
- Unwanted sexual advances, propositions or other sexual comments, such as:
 - Sexually oriented gestures, notices, remarks, jokes, or comments about a person's sexuality or sexual experience.
 - Preferential treatment or promises of preferential treatment to an individual for submitting to sexual conduct, including soliciting or attempting to solicit any individual to engage in sexual activity for compensation or reward or deferential treatment for rejecting sexual conduct.
 - Subjecting or threats of subjecting a student or employee to unwelcome sexual attention or conduct or intentionally making the student's or employee's performance more difficult because of the student's or the employee's sex.
- Sexual or discriminatory displays or publications anywhere in the work or educational environment, such as:
 - Displaying pictures, cartoons, posters, calendars, graffiti, objections, promotional materials, reading materials, or other materials that are sexually suggestive, sexually demeaning or pornographic or bringing or possessing any such material to read, display or view in the work or educational environment.
 - Reading publicly or otherwise publicizing in the work or educational environment materials that are in any way sexually revealing, sexually suggestive, sexually demeaning or pornographic.
 - Displaying signs or other materials purporting to segregate an individual by sex in an area of the work or educational environment (other than restrooms or similar rooms).

The illustrations of harassment and sexual harassment above are not to be construed as an all-inclusive list of prohibited acts under this Policy.

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:

1. Placing a reasonable student ¹ or students in fear of harm to that student's or those students' person or property.
2. Causing a reasonable student to experience a substantially detrimental effect on his or her physical or mental health.
3. Causing a reasonable student to experience a substantial interference with his or her academic performance.
4. 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.

Electronic act means the creation and transmission originated on or off the schoolsite, by means of an electronic device, including, but not limited to, a telephone, wireless telephone, or other wireless communication device, computer, or pager, of a communication, including, but not limited to, any of the following:

1. A message, text, sound, video, or image.
2. A post on a social network Internet Web site including, but not limited to:
 - a. Posting to or creating a burn page. A "burn page" means an Internet Web site created for the purpose of having one or more of the effects as listed in the definition of "bullying," above.
 - b. Creating a credible impersonation of another actual student for the purpose of having one or more of the effects listed in the definition of "bullying," above. "Credible impersonation" means to knowingly and without consent impersonate a student for the purpose of bullying the student and such that another student would reasonably believe, or has reasonably believed, that the student was or is the student who was impersonated.
 - c. Creating a false profile for the purpose of having one or more of the effects listed in the definition of "bullying," above. "False profile" means a profile of a fictitious student or a profile using the likeness or attributes of an actual student other than the student who created the false profile.

¹ "Reasonable student" is defined as a student, including, but not limited to, an exceptional needs student, who exercises care, skill and judgment in conduct for a person of the student's age, or for a person of the student's age with his or her exceptional needs.

3. An act of “Cyber sexual bullying” including, but not limited to:
 - a. The dissemination of, or the solicitation or incitement to disseminate, a photograph or other visual recording by a student to another student or to school personnel by means of an electronic act that has or can be reasonably predicted to have one or more of the effects described in definition of “bullying,” above. A photograph or other visual recording, as described above, shall include the depiction of a nude, semi-nude, or sexually explicit photograph or other visual recording of a minor where the minor is identifiable from the photograph, visual recording, or other electronic act.
 - b. “Cyber sexual bullying” does not include a depiction, portrayal, or image that has any serious literary, artistic, educational, political, or scientific value or that involves athletic events or school-sanctioned activities.
4. Notwithstanding the definitions of “bullying” and “electronic act” above, an electronic act shall not constitute pervasive conduct solely on the basis that it has been transmitted on the Internet or is currently posted on the Internet.

Formal Complaint of Sexual Harassment means a written document filed and signed by a complainant who is participating in or attempting to participate in IA ’s education program or activity or signed by the Coordinator alleging sexual harassment against a respondent and requesting that IA investigate the allegation of sexual harassment.

Respondent means an individual who has been reported to be the perpetrator of conduct that could constitute sexual harassment.

Bullying and Cyberbullying Prevention Procedures

IA has adopted the following procedures for preventing acts of bullying, including cyberbullying.

1. Cyberbullying Prevention Procedures

IA advises students:

- a. To never share passwords, personal data, or private photos online.
- b. To think about what they are doing carefully before posting and by emphasizing that comments cannot be retracted once they are posted.
- c. 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.
- d. 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.

2. 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.

3. 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.

Grievance Procedures

1. Scope of Grievance Procedures

IA will comply with its Uniform Complaint Procedures (“UCP”) policy when investigating and responding to complaints alleging unlawful harassment, discrimination, intimidation or bullying against a protected group or on the basis of a person’s association with a person or group with one or more of the protected characteristics set forth in the UCP that:

- a. Are written and signed;
- b. Filed by an individual who alleges that that individual has personally suffered unlawful discrimination, harassment, intimidation or bullying, or by one who believes any specific class of individuals has been subjected to discrimination, harassment, intimidation or bullying prohibited by this Policy, or by a duly authorized representative who alleges that an individual student has been subjected to discrimination, harassment, intimidation, or bullying; and
- c. Submitted to the IA UCP Compliance Officer not later than six (6) months from the date the alleged unlawful discrimination, harassment, intimidation or bullying occurred, or the date the complainant first obtained knowledge of the facts of the alleged discrimination, harassment, intimidation or bullying.

The following grievance procedures shall be utilized for reports of misconduct prohibited by this Policy that do not comply with the writing, timeline, or other formal filing requirements of a uniform complaint. For formal complaints of sexual harassment, IA will utilize the following grievance procedures in addition to its UCP when applicable.

1. Reporting

All staff are expected to provide appropriate supervision to enforce standards of conduct and, if they observe or become aware of misconduct prohibited by this Policy, to intervene when safe to do so, call for assistance, and report such incidents. The Board requires staff to follow the procedures in this policy for reporting alleged acts of misconduct prohibited by this Policy.

Any student who believes they have been subject to misconduct prohibited by this Policy or has witnessed such prohibited misconduct is encouraged to immediately report such misconduct to the Coordinator:

Christine Kuglen
Executive Director

5454 Ruffin Road, San Diego, CA 92123
858-271-1414
christine@innovationsacademy.org

Complaints regarding such misconduct may also be made to the U.S. Department of Education, Office for Civil Rights. Civil law remedies, including, but not limited to, injunctions, restraining orders, or other remedies or orders may also be available to complainants.

While submission of a written report is not required, the reporting party is encouraged to submit a written report to the Coordinator. IA will investigate and respond to all oral and written reports of misconduct prohibited by this Policy in a manner that is not deliberately indifferent. Reports may be made anonymously, but formal disciplinary action cannot be based solely on an anonymous report.

Students are expected to report all incidents of misconduct prohibited by this Policy or other verbal, or physical abuses. Any student who feels they are a target of such behavior should immediately contact a teacher, counselor, the Executive Director, Coordinator, a staff person or a family member so that the student can get assistance in resolving the issue in a manner that is consistent with this Policy.

IA acknowledges and respects every individual's right to privacy. All reports shall be investigated in a manner that protects the confidentiality of the parties and the integrity of the process to the greatest extent possible. This includes keeping the identity of the reporter confidential, as appropriate, except to the extent necessary to comply with the law, carry out the investigation and/or to resolve the issue, as determined by the Coordinator or administrative designee on a case-by-case basis.

IA prohibits any form of retaliation against any individual who files a report or complaint, testifies, assists, participates, or refuses to participate in any investigation or proceeding related to misconduct prohibited by this Policy. Such participation or lack of participation shall not in any way affect the status, grades, or work assignments of the individual. Individuals alleging retaliation in violation of this Policy may file a grievance using the procedures set forth in this Policy. Knowingly making false statements or knowingly submitting false information during the grievance process is prohibited and may result in disciplinary action.

All supervisors of staff will receive sexual harassment training within six (6) months of their assumption of a supervisory position and will receive further training once every two (2) years thereafter. All staff, and any individual designated as a coordinator, investigator or decision-maker and any person who facilitates an informal resolution process will receive sexual harassment training and/or instruction concerning sexual harassment as required by law.

3. Supportive Measures

Upon the receipt of an informal or formal complaint of sexual harassment, the Coordinator will promptly contact the complainant to discuss the availability of

supportive measures. The Coordinator will consider the complainant's wishes with respect to supportive measures, inform the complainant of the availability of supportive measures with or without the filing of a formal complaint of sexual harassment, and explain the process for filing a formal complaint of sexual harassment.

Supportive measures are non-disciplinary, non-punitive individualized services offered as appropriate, as reasonably available, and without fee or charge to the complainant or the respondent before or after the filing of a formal complaint of sexual harassment or where no formal complaint of sexual harassment has been filed. Such measures are designed to restore or preserve equal access to IA's education program or activity without unreasonably burdening the other party, including measures designed to protect the safety of all parties or IA's educational environment, or deter sexual harassment. Supportive measures available to complainants and respondents may include but are not limited to counseling, extensions of deadlines or other course-related adjustments, modifications of work or class schedules, campus escort services, mutual restrictions on contact between the parties, changes in work locations, leaves of absence, increased security and monitoring of certain areas of the campus, and other similar measures. IA will maintain as confidential any supportive measures provided to the complainant or respondent, to the extent that maintaining such confidentiality would not impair the ability of IA to provide the supportive measures.

4. Investigation and Response

Upon receipt of a report of misconduct prohibited by this Policy from a student, staff member, parent, volunteer, visitor or affiliate of IA, the Coordinator (or designee) will promptly initiate an investigation. A third-party investigator may be retained to conduct the investigation. In most cases, a thorough investigation will take no more than twenty-five (25) school days. If the Coordinator (or designee) determines that an investigation will take longer than twenty-five (25) school days and needs to be delayed or extended due to good cause, the Coordinator (or designee) will inform the complainant of the reasons for the delay or extension and provide an approximate date when the investigation will be complete.

At the conclusion of the investigation, the Coordinator (or designee) will meet with the complainant and, to the extent possible with respect to confidentiality laws, provide the complainant with information about the investigation, including any actions necessary to resolve the incident/situation. However, the Coordinator (or administrative designee) will not reveal confidential information related to other students or employees.

For investigations of and responses to formal complaints of sexual harassment, the following grievance procedures will apply:

- Notice of the Allegations
 - Upon receipt of a formal complaint of sexual harassment, the Coordinator or designee will give all known parties written notice of its grievance process, including any voluntary informal resolution process. The notice will include:

- A description of the allegations of sexual harassment at issue and to the extent known, the identities of the parties involved in the incident, the conduct allegedly constituting sexual harassment, and the date and location of the alleged incident;
 - A statement that the respondent is presumed not responsible for the alleged conduct until a final decision is reached;
 - A statement that the parties may have an advisor of their choice, who may be an attorney, and may inspect and review evidence; and
 - A statement that IA prohibits an individual from knowingly making false statements or knowingly submitting false information during the grievance process.
- Emergency Removal
 - IA may place a non-student employee respondent on administrative leave during the pendency of a formal complaint of sexual harassment grievance process in accordance with IA's policies.
 - IA may remove a respondent from IA's education program or activity on an emergency basis, in accordance with IA's policies, provided that IA undertakes an individualized safety and risk analysis, determines that an immediate threat to the physical health or safety of any student or other individual arising from the allegations of sexual harassment justifies removal, and provides the respondent with notice and an opportunity to challenge the decision immediately following the removal.
 - This provision may not be construed to modify any rights under the IDEA, Section 504, or the ADA.
- Informal Resolution
 - If a formal complaint of sexual harassment is filed, IA may offer a voluntary informal resolution process, such as mediation, to the parties at any time prior to reaching a determination regarding responsibility. If IA offers such a process, it will do the following:
 - Provide the parties with advance written notice of:
 - The allegations;
 - The requirements of the voluntary informal resolution process including the circumstances under which the parties are precluded from resuming a formal complaint of sexual harassment arising from the same allegations;
 - The parties' right to withdraw from the voluntary informal resolution process and resume the grievance process at any time prior to agreeing to a resolution; and
 - Any consequences resulting from participating in the voluntary informal resolution process, including the records that will be maintained or could be shared; and
 - Obtain the parties' advance voluntary, written consent to the informal resolution process.
 - IA will not offer or facilitate an informal resolution process to resolve allegations that an employee sexually harassed a student.
- Investigation Process

- The decision-maker will not be the same person(s) as the Coordinator or the investigator. IA shall ensure that all decision-makers and investigators do not have a conflict of interest or bias for or against complainants or respondents.
- In most cases, a thorough investigation will take no more than twenty-five (25) school days. If the investigator determines that an investigation will take longer than twenty-five (25) school days and needs to be delayed or extended due to good cause, the investigator will inform the complainant and any respondents in writing of the reasons for the delay or extension and provide an approximate date when the investigation will be complete.
- The parties will be provided with an equal opportunity to present witnesses, to inspect and review any evidence obtained that is directly related to the allegations raised, and to have an advisor present during any investigative meeting or interview.
- The parties will not be prohibited from discussing the allegations under investigation or to gather and present relevant evidence.
- A party whose participation is invited or expected at an investigative meeting or interview will receive written notice of the date, time, location, participants, and purpose of the meeting or interview with sufficient time for the party to prepare to participate.
- Prior to completion of the investigative report, IA will send to each party and the party's advisor, if any, a copy of the evidence subject to inspection and review, and the parties will have at least ten (10) days to submit a written response for the investigator's consideration prior to the completion of the investigation report.
- The investigator will complete an investigation report that fairly summarizes relevant evidence and send a copy of the report to each party and the party's advisor, if any, at least ten (10) days prior to the determination of responsibility.
- Dismissal of a Formal Complaint of Sexual Harassment
 - If the investigation reveals that the alleged harassment did not occur in IA's educational program in the United States or would not constitute sexual harassment even if proved, the formal complaint with regard to that conduct must be dismissed. However, such a dismissal does not preclude action under another applicable IA policy.
 - IA may dismiss a formal complaint of sexual harassment if:
 - The complainant provides a written withdrawal of the complaint to the Coordinator;
 - The respondent is no longer employed or enrolled at IA; or
 - The specific circumstances prevent IA from gathering evidence sufficient to reach a decision on the formal complaint or the allegations therein.
 - If a formal complaint of sexual harassment or any of the claims therein are dismissed, IA will promptly send written notice of the dismissal and the reason(s) for the dismissal simultaneously to the parties.
- Determination of Responsibility
 - The standard of evidence used to determine responsibility is the preponderance of the evidence standard.

- Determinations will be based on an objective evaluation of all relevant evidence and credibility determinations will not be based on a person's status as a complainant, respondent, or witness.
- IA will send a written decision on the formal complaint to the complainant and respondent simultaneously that describes:
 - The allegations in the formal complaint of sexual harassment;
 - All procedural steps taken including any notifications to the parties, interviews with parties and witnesses, site visits, and methods used to gather other evidence;
 - The findings of facts supporting the determination;
 - The conclusions about the application of IA's code of conduct to the facts;
 - The decision and rationale for each allegation;
 - Any disciplinary sanctions the recipient imposes on the respondent, and whether remedies designed to restore or preserve equal access to the education program or activity will be provided to the complainant; and
 - The procedures and permissible bases for appeals.

5. Consequences

Students or employees who engage in misconduct prohibited by this Policy, knowingly make false statements or knowingly submit false information during the grievance process may be subject to disciplinary action up to and including suspension and/or expulsion from IA or termination of employment. The Coordinator is responsible for effective implementation of any remedies ordered by IA in response to a formal complaint of sexual harassment.

6. Right of Appeal

Should the reporting individual find IA's resolution unsatisfactory, the reporting individual may, within five (5) business days of notice of IA's decision or resolution, submit a written appeal to the President of the IA Board, who will review the investigation and render a final decision.

The following appeal rights and procedures will apply to formal complaints of sexual harassment:

- The complainant and the respondent shall have the same appeal rights and IA will implement appeal procedures equally for both parties.
- Within five (5) business days of IA's written decision or dismissal of the complaint, the complainant or respondent may submit a written appeal to the Coordinator.
- The decision-maker(s) for the appeal will not be the same person(s) as the Coordinator, the investigator or the initial decision-maker(s).
- The complainant and respondent may appeal from a determination regarding responsibility, and from IA's dismissal of a formal complaint or any allegations therein, on the following bases:
 - Procedural irregularity that affected the outcome of the matter;
 - New evidence that was not reasonably available at the time the determination regarding responsibility or dismissal was made, that could affect the outcome of the matter; and

- The Title IX Coordinator, investigator(s), or decision-maker(s) had a conflict of interest or bias for or against complainants or respondents generally or the individual complainant or respondent that affected the outcome of the matter.
- IA will notify the other party in writing when an appeal is filed.
- The decision-maker for the appeal will give both parties a reasonable, equal opportunity to submit a written statement in support of, or challenging, the outcome; issue a written decision describing the result of the appeal and the rationale for the result; and provide the written decision simultaneously to both parties.

7. Recordkeeping

All records related to any investigation of complaints under this Policy are maintained in a secure location.

IA will maintain the following records for at least seven (7) years:

- Records of each sexual harassment investigation, including any determination of responsibility; any audio or audiovisual recording or transcript; any disciplinary sanctions imposed on the respondent; and any remedies provided to the complainant.
- Records of any appeal of a formal sexual harassment complaint and the results of that appeal.
- Records of any informal resolution of a sexual harassment complaint and the results of that informal resolution.
- All materials used to train Title IX coordinators, investigators, decision-makers, and any person who facilitates an informal resolution process.
- Records of any actions, including any supportive measures, taken in response to a report or formal complaint of sexual harassment.



Innovations Academy

Powerfully creating our lives through self-expression, compassionate connection and purposeful learning

5454 Ruffin Rd. San Diego, CA 92123 (858)271-1414

TITLE IX, HARASSMENT, INTIMIDATION, DISCRIMINATION & BULLYING COMPLAINT FORM

Your Name: _____ Date: _____

Date of Alleged Incident(s): _____

Name of Person(s) you have a complaint against: _____

List any witnesses that were present: _____

Where did the incident(s) occur? _____

Please describe the events or conduct that are the basis of your complaint by providing as much factual detail as possible (i.e. specific statements; what, if any, physical contact was involved; any verbal statements; what did you do to avoid the situation, etc.) (Attach additional pages, if needed):

I hereby authorize IA to disclose the information I have provided as it finds necessary in pursuing its investigation. I hereby certify that the information I have provided in this complaint is true and correct and complete to the best of my knowledge and belief. I further understand that providing false information in this regard could result in disciplinary action up to and including termination.

Signature of Complainant

Date: _____

Print Name

To be completed by the Charter School:

Received by: _____

Date: _____

Follow up Meeting with Complainant held on: _____



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Individual Educational Evaluation (IEE)

Federal law defines an independent educational evaluation (IEE) broadly as an evaluation conducted by a qualified examiner who is not employed by the public agency responsible for the education of a child. Innovations Academy has developed this policy to govern Independent Educational Evaluations.

IEE at Parent Expense

The governing board of Innovations Academy acknowledges that a parent/guardian has the right to obtain an independent educational evaluation (IEE) at their own expense at any time. In these circumstances, the director or designee(s) shall ensure that the student's independent education plan (IEP) team shall consider the results of the IEE when determining an offer of a Free Appropriate Public Education (FAPE) for the student. However, the results of an IEE will not dictate the IEP team's determinations.

If a parent/guardian requests reimbursement for an IEE assessment obtained by the parent/guardian at their own expense, the director or designee(s) shall ensure that the unilaterally obtained IEE meets the LEA criteria discussed in this policy.

IEE at Public Expense

The local education agency (LEA) governing board recognizes that federal and state laws provide parents/guardians of students with disabilities the right to obtain an IEE, at public expense, when the parent/guardian disagrees with an assessment conducted by the LEA within the last two years.

The director or designee(s) shall ensure that when a parent/guardian requests an IEE at public expense the LEA/district shall provide the parent/guardian with a copy of their Procedural Safeguards *and* either:

- I. Initiate a due process hearing to show that the evaluation, completed by the LEA, is appropriate; or
- II. Provide the parent/guardian with information about where an IEE may be obtained, the LEA's criteria applicable for IEEs, and ensure that an IEE is provided at public expense.

In instances in which the LEA is granting the parent's request for an IEE, the director or designee(s) shall ensure the following:

1. The criteria under which the IEE is obtained at public expense , including the location of the evaluation and the qualifications of the examiner, must be the same as the criteria that the LEA uses when it initiates an evaluation.
2. The LEA does not impose timelines related to obtaining an IEE at public expense.
3. All assessments shall be completed by persons competent to perform the assessment as determined by the LEA.
4. The IEE shall be administered by an evaluator who holds equivalent certifications, licenses, or other qualifications that would be required of the LEA staff to provide similar evaluations.
5. A parent/guardian shall have the opportunity to demonstrate that unique circumstances justify a waiver of any of the criteria listed above as defined by the LEA.

IEE Cost Determination

An independent multidisciplinary evaluation will be limited to a total cost of \$7,500. Single

disciplinary evaluations will be limited to the following schedule of costs:

Type of Assessment	San Diego
Assistive Technology -stand alone	\$1,500
Auditory Perception/Auditory Processing-stand alone	\$1,000
Functional Behavior Assessment-stand alone	\$3,000
Cognitive/Full Psycho-Educational (rate allowed depends on the components tested, such as academics, adaptive behavior, cognition, social/emotional -ERMHS, FBA)	\$7,500
Occupational Therapy -stand alone	\$1,100
Physical Therapy - stand alone	\$1,100
Speech and Language - stand alone	\$1,600
Functional Vision - stand alone	\$1,000

The maximum amounts listed above have been established to allow parents to choose from among qualified professionals in the area.

The director or designee(s) shall request that the parent/guardian voluntarily have their private health insurance pay the costs of the IEE if covered by their insurance. However, the LEA governing board recognizes that federal and state laws specify that parents/guardians are not required to have private insurance cover the costs of an IEE if the process would result in a financial cost to the parent/guardian including but not limited to:

- I. A decrease in available lifetime coverage or any other benefit under an insurance policy;
- II. An increase in premiums or the discontinuance of the policy; or

III. An out-of-pocket expense such as payment of a deductible amount incurred in filing a claim.

Local Limitations for Evaluators

Evaluators must be located within the greater San Diego area, within a 40 mile radius of Innovations Academy.

Legal References

California Education Code Section 56322

California Education Code Section 56329

34 CFR 300.502

Approved: Pending Approval



Innovations Academy

Date:

To the Parent(s) or Guardian(s) of [Student's Full Name]

[Student's Address]

[City, State, ZIP Code]

Re: Notice of Expulsion Hearing and Rights to Due Process

Dear [Parent/Guardian's Name],

This letter serves as formal notice regarding the expulsion hearing for [Student's Full Name], from Innovations Academy Charter School, regarding the alleged violation of school policies and the potential consequences of expulsion.

1. Reason for the Hearing: The reason for the hearing is to address the alleged violation(s) of school rules, as outlined in the [specific policy violated], which occurred on [date of incident]. A summary of the incident is as follows: [Provide brief details of the incident and the violation(s)].

2. Scheduled Hearing: The expulsion hearing is scheduled for [date] at [time]. The hearing will take place at [location of hearing]. During the hearing, the Innovations Academy governing board will consider whether to expel the student from school.

3. Due Process Rights: In accordance with the California Education Code and your child's constitutional rights, you and your child are entitled to the following due process rights:

- Right to a Fair Hearing: You and your child are entitled to a fair and impartial hearing conducted by the governing board.
- Right to be Informed of Allegations: You and your child are entitled to a clear and detailed explanation of the charges against the student.
- Right to Representation: You have the right to be represented at the hearing by legal counsel or another representative of your choosing.
- Right to Present Evidence: You and your child have the right to present evidence in defense of the charges, including testimony from witnesses.
- Right to Question Witnesses: You and your child will have the right to cross-examine any witnesses who testify against the student during the hearing.

- Right to Access Evidence: You have the right to review any documents, statements, or other evidence the school intends to present at the hearing.
- Right to Privacy: The hearing is a confidential proceeding and will be closed to the public unless you request otherwise at least five (5 days) prior to the hearing date.
- Right to Appeal: If the Innovations Academy governing board decides to expel the student, you have the right to appeal the decision to the county board of education.

4. Expulsion Hearing Procedure: The hearing will be conducted as follows: The school administration will present the charges and evidence. You or your representative may present evidence, call witnesses, and cross-examine the school's witnesses. The board will make findings based on the evidence presented. The governing board will decide whether to expel the student, and if so, the duration of the expulsion.

5. Possible Consequences: If the governing board determines that the student should be expelled, the expulsion may be for a period not exceeding one year, as allowed under California Education Code Section 48918. Additionally, there may be other consequences or alternatives to expulsion, such as a rehabilitation plan or alternative educational placement.

6. Additional Information: Should you have any questions regarding this notice, the hearing process, or your child's rights, please do not hesitate to contact Christine Kuglen at christine@innovationsacademy.org or 858-271-1414.

We strongly encourage you to attend the hearing to ensure that your child's rights are fully respected and that you have the opportunity to present your case.

With Respect,

Christine Kuglen, Director

CSMC Service Contract



Innovations Academy

5454 Ruffin Road

San Diego, CA 92123

July 01, 2025

CSMC
43460 Ridge Park Drive
Temecula, CA 92590
888.994.CSMC

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CSMC Contract: Price Sheet

Innovations Academy

5454 Ruffin Road
 San Diego, CA 92123

Details - Initial Term: July 01, 2025 - June 30, 2026

Services Selected	Setup Fee	Service Cost	Total
Back-Office Service - Payroll Service - Bundled: SIS Support, State Reporting, CALPADS	\$0.00	\$6,562.50	\$78,750.00

Summary: Entirety of Terms Set Forth

Terms	Start Date	End Date	Total
Initial Term	July 01, 2025	June 30, 2026	\$78,750.00
Year 2	July 01, 2026	June 30, 2027	\$82,688.00
Year 3	July 01, 2027	June 30, 2028	\$86,822.00
Year 4	July 1, 2028	June 30, 2029	\$91,163.00
Year 5	July 1, 2029	June 30, 2030	\$95,721.00

I authorize CSMC to automatically charge my account monthly for amounts due that are outlined in this pricing sheet.

Signed By:

Name: Christine Kuglen

Date:

Signature:

Provision of Core Services

CSMC's core services include comprehensive financial back-office support including accounting, budgeting, and compliance reporting along with payroll and retirement reporting services and student data services including SIS, attendance, and state reporting support. We have 25 years of experience providing high quality services in California.

One of CSMC's core values is to improve the client partner experience. One way we commit to doing this is by being responsive and accessible. We can be nimble on how you prefer we communicate with you and your team.

We are accessible from 8 am to 7 pm via email, Teams, phone, and text. With advance planning we can be available on weekends. We want our communication protocols to be tailored to your needs and preferences. As a rule of thumb, you will receive an email response within 24 hours. We will accommodate your Board meeting schedule.

CSMC goes above and beyond our core services with our expertise in *Accountability and Education Program Compliance and Grant Writing Services* (outlined below.) We include your free access to regularly scheduled webinars facilitated by our experts.

As former charter school founders, administrators, and authorizers, we bring a unique and valued perspective that our client partners recognize by helping convey financial compliance and authorizer expectations in a way that best supports the dynamic leadership and Board at each of our client partners.

BUDGETING:

- **Create annual and multi-year budgets including monthly cash flow projections** – At beginning of the Agreement, CSMC works with the Charter School leader to create annual and multi-year budgets in time for submission to the State and authorizer. Annual budgets are strategic documents that capture the operations and direction of the Charter School.
- **Make budget revisions (as needed and upon Charter School request)** – CSMC can make budget revisions as needed and when the Charter School requests them to reflect changing circumstances (e.g., enrollment or personnel changes, grant awards, etc.) We create customized budget scenarios to inform decision making by school leadership and the Governing Board. CSMC tracks the budget to actuals and can update the budget forecast as requested or appropriate.
- **Updated monthly budget forecasts** – CSMC tracks budget to actuals and updates the budget forecast as appropriate.

FINANCIAL STATEMENTS:

- **Monthly year-to-date financial statements** – CSMC prepares Year to Date (YTD) actual results compared to the budget for board meetings or as requested.
- **Sage Intacct** - Your real time access to the accounting system allows you to drill down to detail, in multiple high value reports commonly used by school leadership and business staff including but not limited to: Statement of Activities; Balance Sheet; Statement of Activities by Restriction/Resource; Budget vs. Actual;

Balance Sheet by Location (for multi-location schools.) See samples of these user-friendly reports in the Appendix section.

- ❑ CSMC typically closes books monthly within fifteen business days of the following month, provided all supporting documentation has been transmitted to CSMC. If the required supporting documentation has not been provided, CSMC will notify school leadership and may produce monthly financials with the information it has, noting what is not included.
- ❑ **Monitors cash position** – CSMC monitors the Charter School's cash position to anticipate possible cash shortfalls.
- ❑ **Cash Management** – As needed for cash critical periods, CSMC can provide projected cash balances for up to 30 days and will notify leadership when anticipating potential cash shortages. Available cash is monitored to ensure adequate balances for recurring transactions such as payroll, retirement, rent, insurance, and taxes.
- ❑ **Customized financial analysis** – CSMC performs reasonable financial analyses that the Charter School staff or board requests, e.g., providing a comparative analysis of the school's budget relative to industry norms or fulfilling a request for information from the authorizing entity. Upon request, CSMC can also develop financial health analysis so the board and staff can quickly focus on the most important financial issues.
- ❑ **Support in resolving financial issues** – CSMC helps the Charter School leader find solutions to financial issues by recommending budget changes and/or identifying sources of potential funding.

ACCOUNTING:

- ❑ **Setup of Charter School's chart of accounts and general ledger** – CSMC sets up and maintains the school's Standardized Account Code Structure (SACS)-compliant chart of accounts.
- ❑ **Customized account codes** – CSMC can add customized account codes for unique features of the Charter School program.
- ❑ **Restricted funds tracking** – CSMC tracks revenue and expenditures by fund, e.g., tracking by implementation grant funds, expenses, or Title I expenditures. Restricted fund balances, expenses and deadlines are routinely reviewed on standing calls.
- ❑ **Assessing Training Needs** – training on CSMC accounting systems and process will begin at the initial stages of onboarding and continue to be provided based on school needs. CSMC will also collaborate with school leadership (as needed) to thoroughly assess existing business operations and compliance reporting processes. CSMC will recommend refinement focused on increasing efficiency, timely exchange of information and sound internal controls.
- ❑ **Transaction recording** – CSMC records all transactions in a computerized accounting system that is available for viewing.
- ❑ **Journal entries and account maintenance** – CSMC prepares and records journal entries and maintains the general ledger according to accepted accounting standards.
- ❑ **Bank reconciliation** – CSMC reconciles primary bank and investment accounts to the general ledger monthly or upon receipt of statements. Revolving and petty cash accounts are reconciled quarterly or as required. CSMC alerts school leadership of any irregularities, unreconciled amounts, or missing documentation.

- ❑ **Capitalized Assets** – CSMC records capital assets in the general ledger according to Charter School financial policy and according to Generally Accepted Accounting Principles. CSMC also records depreciation on an annual basis and maintains a schedule of capitalized assets and accumulated depreciation. Charter School is responsible for tagging and conducting inventories for all fixed assets whether capitalized or non-capitalized for internal control purposes and other compliance reporting.
- ❑ **Sage Intacct accounting reports** - The Sage Intacct portal allows the Charter School and CSMC to generate financial reports on an as-needed basis. Charter School can generate reports including, but not limited to detailed account activity, including scans of all invoices entered through the accounts payable system; check register activity; summary of the budget, expenditures by account; cash balances; payroll register (for periods when payroll is processed by CSMC); revenues; and general ledger.
- ❑ **LLC Accounting Services** (fee for service)
 - ❑ Setup Chart of Accounts.
 - ❑ Bank Reconciliation: Reconcile Bank Accounts and/or Trustee accounts to the General Ledger monthly.
 - ❑ Maintain General Ledger: Prepare and record entries to the General Ledger according to Generally Accepted Accounting Standards.
 - ❑ Capitalized Assets: Prepare and maintain Depreciation Schedule, record depreciation entries to the General Ledger per the schedule.
 - ❑ Bonds entries: Prepare and record Bonds entries per amortization schedule.
 - ❑ Reconcile Due to/Due from Account with the Charter School.
 - ❑ Provide reports and support for LLC audit process.
 - ❑ Fee for service applies. \$1000.00 per month. \$12000.00 per year.

ACCOUNTS PAYABLE & RECEIVABLE:

- ❑ **Revenue verification** – CSMC reviews revenue intake and verifies that the Charter School is receiving accurate amounts of state and federal funds based on its enrollment and other pertinent factors. CSMC reviews revenue intake and verifies through available state Department of Education schedules.
- ❑ **Revenue collection for improperly calculated payments** – if the funds received from the state or the county/district do not reflect the proper amounts and there appears to be a calculation error, CSMC will contact the appropriate officials and alert them of the issue. CSMC will use reasonable efforts to negotiate on behalf of the Charter School in disputes with funding agencies over improperly calculated payments.
- ❑ **Accounts Payable functions:** CSMC's automated accounts payable system increases visibility and accountability for both the timely generation of invoices by vendors and timely payment by the charter school, in facilitating the review, approval and processing of accounts payable. The streamlined coding process saves time and simplifies research on status of vendors and bills.
 - Vendors submit invoices electronically and directly into the automated AP.
 - Vendors can choose how they receive payment. All payments are issued by the third party and funds are taken via ACH from the school's bank account once invoices are approved for processing, in accordance with board approved fiscal policies and procedures.

- **Invoice review** - CSMC reviews invoices to assist in the prevention of double payments or double billings on multiple invoices. CSMC alerts Charter School to payment issues with vendors.
- **Invoice payment support** - CSMC also verifies that funds are available to pay the bill and notifies Charter School if there are not sufficient funds.
- **Fund verification is only available** if there is online read-only bank access and if all checks are processed through CSMC. Your school's provision of read-only access at the outset of the service agreement is critical.

❑ **Rush Check and Express Shipping - Fee for Service**

- CSMC automated accounts payable system and schedule allow sufficient time for processing and paying invoices.
- A service fee applies to all rush check requests, including any overnight or express shipping charges.
- Each rush check incurs a fee of \$50.00.
- The charter school is responsible for all overnight and express shipping charges and will be invoiced accordingly.

AUDIT SUPPORT AND GOVERNMENT FINANCIAL REPORTING:

CSMC has developed a strong rapport with multiple audit firms who recognize our responsiveness and timely provision of data required to complete a timely and compliant audit. We are committed to facilitating the delivery of a clean and timely audit for your school. We project-manage your audit for you, so you don't have to. Whenever possible, we collaborate to establish clear deadlines for a draft and/or final audit report maximizing your Board's time to review, understand and approve the audit prior to the December 15 due date.

- ❑ **Audited financial reports** – Subject to timely receipt of information and/or materials from the school and/or the auditor, as applicable, CSMC prepares all financial information for the audit so that the auditor can file reports before state-required deadlines.
- ❑ **Project Management** - You can expect us to inform school leadership immediately if we experience unforeseen delays from the audit firm or challenges securing required information from school staff.
- ❑ We're always available to attend a meeting or call with the school and audit firm if needed to ensure the best outcome in the audit report process.
- ❑ **Preliminary and final budget reports** – CSMC prepares and files the preliminary budget report by July 1st (or earlier if required by the authorizer) based on the board-adopted budget unless Charter School agrees to file reports. CSMC can also prepare a final budget upon request.
- ❑ **Interim financial reports** – CSMC prepares and files the two interim financial reports to the county by the December 15 and March 15 (or earlier if required by the authorizer) deadlines.

SB 740 COMPLIANCE

- ❑ **SB 740 applications** – CSMC works with the client to submit SB 740 facilities applications and reimbursements on the Charter School's behalf for classroom-based charter schools with eligible facilities costs.

- **SB 740 funding determination form** – CSMC provides ongoing management and support in meeting the SB-740 Funding Determination targets and funding requirements for all non-classroom-based Charters. CSMC prepares and submits the Funding Determination Application each cycle, supporting the school throughout the entire process to ensure maximum funding.

MONTHLY FINANCIAL REPORTS AND UPDATE

- **Monthly Financials and Board Packet**- To keep the charter school leadership informed so that they can make prudent financial decisions, CSMC's creates a detailed board report for each regularly scheduled board meeting that includes budget to actuals with a written narrative analysis, cash flow projections; Balance Sheet Summary; school's performance against key financial metrics; and Compliance Reporting Look Ahead. We provide you with the option of including additional financial reports in the supplemental section.
- Typically, CSMC closes each monthly reporting period by the 15th day of the following month, enabling us to provide comprehensive monthly financials shortly after closing.
- CSMC is committed to providing comprehensive and timely financials and will notify school staff and leadership of missing back up or information needed from the school

BOARD MEETING SUPPORT, AND PRESENTATION OF MONTHLY FINANCIALS

- **Monthly financials and Board Packet**- CSMC creates a detailed board report for each regular board meeting that includes budget to actuals with a written narrative analysis, cash flow projections; Balance Sheet Summary; school's performance against key financial metrics; and Compliance Reporting Look Ahead. We provide you with the option of including additional financial reports in the supplemental section
- **Board meeting presentations** - - CSMC participates in board meetings via teleconference and presents financial reports and analysis. If periodic in person attendance is what you prefer, CSMC and the charter school will make appropriate arrangements.

COMPLIANCE & ACCOUNTABILITY

- CSMC can support all required compliance reporting, and we recognize the importance of timeliness and accuracy. On our *Client Partner Standing Call*, CSMC routinely reviews all compliance and submission requirements up to three months in advance of the due date. This facilitates a shared understanding of roles between your school staff and CSMC and task completion timelines, so nothing falls through the cracks.
- **Compliance Calendar** - CSMC provides a compliance calendar with a "Look Ahead" feature that provides an outline for review (of all compliance requirements) with school leadership up to three months in advance of due dates to facilitate planning.
- **Compliance support** - Charter School is solely responsible for complying with legal requirements. CSMC will provide advice and guidance in a non-legal capacity to support Charter School's compliance efforts. Please note that CSMC's guidance does not constitute professional legal services. Since rules, regulations, and interpretations regularly change, Charter Schools should seek independent verification and counsel from their attorneys or other sources to ensure legal compliance.
- **SPED financial reporting** – With input and information from Charter School, CSMC provides required SPED financial reports.

- ❑ **Funding compliance** – CSMC makes compliance recommendations regarding funding requirements, implementation grant funding and other restricted funds. Note that funding compliance is especially complex with many requirements the Charter School must satisfy.
- ❑ **District and state regulation compliance** – CSMC can problem-solve with the Charter School areas deemed not in compliance with the district or state regulations.

FISCAL POLICIES AND PROCEDURES -DEVELOPMENT AND TRAINING

- ❑ CSMC routinely reviews and makes recommendations for improving compliance and increasing efficiencies in your school's fiscal policies and procedures. We can support your best practice of annual review, refinement, and Board approval of your fiscal policies, based on feedback from your auditor, authorizer, leadership, and staff. We also are experienced at providing training for your staff and Board aligned to annual edits and focused on key elements of your policy.

GRANT MANAGEMENT AND SUPPORT

- ❑ **Fund accounting** – CSMC tracks restricted revenues and expenses based on information received from the Charter School.
- ❑ **Financial reports** – CSMC prepares customized financial reports for grant purposes.
- ❑ **Con App** – CSMC assists in the preparation and filing of the Con App parts 1 and 2 for eligible schools.
- ❑ ***In addition to the above, CSMC now offers fees for service support with grant research and application development for schools interested in pursuing other specialized grant funds.***

AUTHORIZER OVERSIGHT SUPPORT

CSMC's goal is for your school to maintain a good standing and strong rapport with your authorizer. We have decades of experience collaborating with the CDE, County Offices of Education, and Local District authorizers.

- ❑ Support with strategy and written responses to your authorizer and review all communications and develop strategic responses.
- ❑ Participate in teleconferences/meetings and meet in person with the school and authorizer, as needed. Including on-site visits.
- ❑ Review and present highlights and feedback from prior oversight visit to business operations staff, leadership, and Board) culminating in a strategic plan and messaging authorizer.
- ❑ Advance review of fiscal preparation guide and all authorizer requests and requirements related to oversight audit. CSMC compiles fiscal documents/folders (and identifies items where school site input is required) so nothing is missed.

VENDORS AND FACILITY FINANCING SUPPORT

- ❑ CSMC can provide support with vendor negotiations and reviewing contracts.
- ❑ CSMC can assist with facility financing and support lender and underwriter relationships.

SERVICE DELIVERY – CLIENT STANDING CALLS

CSMC utilizes a **CLIENT STANDING CALL** routine with most clients.

- ❑ This is a pre-set, recurring meeting, set to fit your schedule.
- ❑ It gives you direct access to your key CSMC contacts in each service division. One-stop.
- ❑ Ensures Responsiveness and Accessibility to Your Client Services and Support Team.
- ❑ Your assigned CSMC School Business Manager, Account Manager, and Payroll Tech participate in these calls along with your School Leadership and Business Operations team.
- ❑ CSMC can facilitate the development of an advance agenda with you to address your priorities while providing your school team with the evolving information, support, and training it needs.
- ❑ Each CSMC service division contributes to this agenda to keep everyone ahead of upcoming deadlines and keep your team coordinated with ours.
- ❑ CSMC follows up with a written summary of your agreed-upon action steps and delegated tasks for our team and yours.

CSMC routinely includes these important topics on these calls:

- ❑ Review of All Compliance Due Dates. Calendar Look Ahead that integrates into Board meeting planning.
- ❑ Restricted funds spending; and tracking. Coding of invoices.
- ❑ LCAP coding; spending; and tracking
- ❑ Outstanding payroll items
- ❑ Outstanding retirement items

CSMC's strategic onboarding and transition plan will include a schedule of these meetings. For most new client partners, these meetings occur weekly and then transition to bi-weekly or monthly.

This time is solely for **your school, and your team**, to collaborate with your entire CSMC Client Services and Support Team!

Roles & Responsibilities - Back-Office

Clarity on certain roles and responsibilities between CSMC and Charter School will help ensure high-quality, timely business services.

Table 1 below outlines the roles and responsibilities of both parties:

Table 1: Roles & Responsibilities - Back Office

CSMC	Innovations Academy
<ul style="list-style-type: none"> ❑ Timely and accurate check payments ❑ Payment of invoices according to Charter School's approval policies ❑ Recordkeeping/processes adhering to generally accepted accounting standards for accuracy and security and approved by independent auditors. ❑ Payment systems linked to financial statements and creating analyses for informed managerial decision-making. ❑ Bank account reconciliations. ❑ Invoice/payment research. ❑ Advising clients on outstanding checks to ensure adequate cash 	<ul style="list-style-type: none"> ❑ Submission of Payment and Deposit Information ❑ Weekly submission to CSMC of invoices, reimbursement requests, deposits, and other expenditures using CSMC forms and processes. ❑ Coding all expenses and non-state funding deposits using CSMC forms and processes and codes from the most recent budget. ❑ Banking: Monitoring and maintaining adequate bank account balances to meet expense obligations ❑ Provide online read-only access to the bank account

Accounting Deadlines and Calendars referenced above shall be provided separately by CSMC.

Scope of Services: Payroll, Retirement Reporting & Human Resources

CSMC uses an external payroll processor to accomplish the following tasks. CSMC helps interface between the Charter School and payroll processors. CSMC and performs quality checking and review of payroll processes. The Charter School pays all payroll processing fees directly to the payroll processor.

- ❑ **Payroll Processing** – CSMC calculates and processes payroll and payroll-related payments/deductions for salaried and hourly employees based on information submitted by authorized Charter School representatives. CSMC generates checks for signature by authorized Charter School representatives (or through electronic signature) or facilitates Direct Deposit at the Charter School's request. The fees set forth above include semi-monthly payroll processing.
- ❑ **Payroll Calendar**-CSMC will produce a payroll calendar to follow the Charter Schools payroll processing needs. This will be reviewed and approved by the Charter School then will be used throughout the fiscal year to meet necessary payroll deadlines.

- ❑ **Payroll Reporting** – CSMC and its payroll processor prepare, and file all required payroll reports for submission to federal and state agencies and submits electronic payroll, payroll tax reports, and payroll tax deposits to the appropriate authorities for a single EDD/tax ID number. CSMC provides payroll reporting services for multiple reporting EDD/tax ID numbers.
- ❑ **W-2 Processing** – CSMC works with the payroll processor to prepare W-2 forms, which are mailed to the Charter School, provided that this Agreement remains in effect at the end of the applicable calendar year, and subject to the timely receipt of accurate and complete information and data from Charter School, per CSMC policies, throughout the Term and including for any portion of the applicable calendar year that preceded the provision of services.
- ❑ **IRS, SDI, WC Support** – CSMC assists in resolving payroll tax issues before the IRS and other federal and state reporting agencies in a non-legal capacity. CSMC also assists the Charter School with any State Disability, Workers Comp, or Unemployment Insurance claims by providing supporting payroll reports.
- ❑ **STRS/PERS and Other Retirement Plan Administration** – The Charter School is responsible for STRS/PERS account set-up, administration forms and notices tied to enrollments, leaves of absence, and terminations, and any fees from outside parties including late fees and interest levied by STRS/PERS.
- ❑ CSMC retirement team will help the Charter School set up STRS/PERS accounts as requested and make appropriate deductions and payments to the county for STRS and/or PERS based on information provided by the Charter School. Some counties charge separately for this mandated service.
- ❑ CSMC will process the Charter Schools monthly retirement reporting and submit either directly to retirement agency or to the county that the Charter School resides.
- ❑ CSMC retirement team will work with the Charter School and county to obtain access to county specific reporting and submission requirements and server specific desktop applications when applicable.
- ❑ The CSMC retirement team can assist the Charter School in setting up with notifications, for required notices for all applicable retirement agencies to ensure they are current on rules and regulations.
- ❑ CSMC retirement team will assist with retirement questions and resolutions with the Charter School. When applicable, provide direct contacts at the county the Charter Schools reside in or retirement agency the Charter School have account(s) with for clarification(s).
- ❑ CSMC clients have discovered that corrections are needed to retirement reporting (STRS/PERS) that was completed before hiring CSMC as their back-office service provider. Often these required prior corrections may not be recognized or identified by clients, their employees, or the agencies involved until a time after the clients have contracted with CSMC. Resolution of these issues can often take months, including penalties and interest due to how retirement agencies process and audit correcting reports. CSMC recognizes the importance of ensuring accurate retirement reporting for all your employees. CSMC has the expertise and experience to support our clients with resolving these issues, however, depending on the time and effort required, CSMC's retirement team support may require a fee for this service arrangement.

HUMAN RESOURCES SUPPORT

- ❑ **Employee File Setup** – CSMC supplies the Charter School with new hire packets to facilitate compliance with state and federal requirements, including Live Scan procedures, TB test guidelines, and credential verification.

- ❑ Teacher Credentialing Support – CSMC offers non-legal guidance and assistance to Charter School leaders in assessing teacher credentials.
- ❑ Handbook Development – CSMC provides non-legal business advice on employee handbooks, focusing on their business implications.

Roles & Responsibilities - Payroll

Clarity on certain roles and responsibilities between CSMC and Charter School will help ensure high-quality, timely business services. **Table 2 below outlines the roles and responsibilities of both parties:**

Table 2: Roles & Responsibilities - Payroll

CSMC	Innovations Academy
<ul style="list-style-type: none"> ❑ Accurate, complete payroll on a semi-monthly basis ❑ Published Payroll Calendar with payroll deadlines. ❑ Reminders for payroll deadlines ❑ Final payroll information is sent to the client for approval by at least one working day before Charter School's payroll approval date when payroll is received per approved calendar. ❑ Audited payroll register will be provided to the Charter School to review and approve prior to payroll submission due date as shown on the payroll deadline calendar. ❑ Advice on setting up STRS/PERS CSMC will provide all payroll tax filing and W-2s. ❑ Maintain client partners payroll systems based on information provided by the Charter School. ❑ Completes monthly retirement reporting for STRS and PERS whichever is applicable. ❑ CSMC will enter STRS retirement profiles for Charter Schools that report directly to STRS and not a county. ❑ CSMC will maintain the appointments of CalPERS employees for Charter Schools that report directly to PERS and not to a county. 	<ul style="list-style-type: none"> ❑ Timecards and Changes: Submission to CSMC of timecards for new hires and other payroll changes by payroll calendar deadlines and using CSMC forms/processes. ❑ Payroll Approval: Approval (email or text) to CSMC by - Payroll Calendar deadlines ❑ New Hires: Timely submission to CSMC of new hire paperwork. ❑ Enrolling (or working with a broker to enroll) staff in any 403b, health plans, and other insurance/retirement/contribution/ deduction programs. ❑ Completing and submitting retirement forms for new hires, new enrollments, leave of absences, terminations, and retiring. ❑ Terminating staff from health plans, retirement plans, other insurance, and other applicable contribution/ deduction programs.

The Payroll Deadlines / Calendars referenced above shall be provided separately by CSMC.

Scope of Service: Student Data and Information System Support; Student information System (SIS) Management

- ❑ **Implementation and Maintenance:** CSMC specializes in the full spectrum of Student Information Systems (SIS) services, from initial setup and configuration to ongoing maintenance, ensuring the system is tailored to meet the unique operational and educational needs of each client partner.
- ❑ **Training:** To maximize the effectiveness of your SIS, CSMC offers detailed training sessions for both administrative and teaching staff, covering critical functionalities like report card management, grading, and scheduling. These sessions are designed to enhance user confidence and proficiency with the system.
- ❑ **SIS Platform Expertise:** CSMC works with a variety of industry-leading SIS platforms, including **PowerSchool, Aeries, School Pathways, Synergy**, and other similar systems. Our team is experienced in optimizing these platforms to support school operations, compliance reporting, and data management needs.

ATTENDANCE REPORTING SUPPORT:

- ❑ **Comprehensive Reporting Assistance:** CSMC provides end-to-end support for all state and local attendance reporting requirements, such as P-1, P-2, and Annual attendance reports, ensuring institutions meet all regulatory compliance mandates efficiently.
- ❑ **Data Verification and Audit Support:** Our team offers thorough assistance in verifying attendance data for accuracy, conducting mock audits, and resolving any discrepancies. This proactive approach is aimed at maintaining the integrity of attendance records and ensuring compliance with state and local regulations.

CALPADS REPORTING AND SUPPORT:

- ❑ **Submission Management:** CSMC manages every aspect of CALPADS reporting, encompassing the preparation, submission, and necessary amendments of reports to satisfy state deadlines and requirements effectively.
- ❑ **Error Resolution and Compliance:** We offer dedicated support in resolving enrollment conflicts and fatal errors, guaranteeing precise CALPADS data submissions. CSMC provides proactive updates and guidance on adapting to CALPADS mandates and changes, ensuring our client-partners are always in compliance.
- ❑ **Ongoing Maintenance:** CSMC conducts bi-weekly uploads of student enrollment files and student information files, ensuring the continual accuracy and timeliness of CALPADS reporting data.

HELP DESK SUPPORT SYSTEM:

- ❑ **Efficient Ticket Submission and Resolution:** CSMC operates a structured desk system, allowing for the efficient submission and tracking of support requests pertaining to SIS, attendance, and CALPADS issues. We are committed to promptly addressing and resolving tickets within 48 hours.

- ❑ **Urgent Support and Communication:** CSMC has established procedures for the escalation and swift resolution of urgent matters. We maintain continuous communication through our help desk system, providing timely updates and gathering necessary information to facilitate quick resolutions.
- ❑ **Service Delivery Commitment:** Charter School Management Corporation (CSMC) is dedicated to delivering these services with unmatched professionalism and expertise. Our team is committed to ensuring that your institution's student data management needs are met with the utmost accuracy, efficiency, and compliance. This service agreement underscores CSMC's pledge to offer comprehensive support across your student data systems, including specialized assistance for SIS, meticulous attendance reporting, CALPADS management, and a responsive help desk support system.
- ❑ **Client Responsibilities: Maintenance and Accuracy of Student Data:** The client partner is responsible for the continuous collection, entry, and upkeep of student data within the designated Student Information System (SIS). This encompasses ensuring both the accuracy and completeness of student data, which is fundamental for the integrity of state reporting, compliance efforts, and maintaining data in a state ready for reporting in line with regulatory requirements. The Client acknowledges the significance of this responsibility in supporting the integrity of compliance and reporting processes. Collaboration for Compliance and Reporting: CSMC commits to providing essential guidance and support regarding compliance and reporting standards. While CSMC will assist in ensuring the Client's understanding and implementation of these requirements, the primary responsibility for the Maintenance and accuracy of the data within the SIS.

Scope of Services: Accountability and Education Program Compliance and Grant Writing Services

(AVAILABLE UPON REQUEST – FEE FOR SERVICES)

- ✓ Accountability Plans ✓ Charter Renewal ✓ Compliance ✓ Educational Partner Engagement
- ✓ Executive Coaching ✓ Governance ✓ Instructional Leadership ✓ State & Federal Education Programs ✓ Grant Research ✓ Writing, and Support

CSMC has the expertise and experience to provide additional support in these accountability and educational program compliance areas.

- ❑ CSMC's **webinars** are open to all charter school partners free of charge and will be filled with the most current information regarding topics ranging from compliance to strategic planning for accountability plans and charter renewal. More intensive workshops are offered for a fee.
- ❑ **CA Data Analysis for Instructional Improvement (State & Federal Accountability)**
Based on available state data including the CA Dashboard and CAASPP, serve as a partner for instructional improvement to meet the needs of various student groups appearing on the Dashboard. If a school has been identified for Differentiated Assistance (DA) and/or ESSA accountability, the school is required to develop a plan for improvement in student outcomes.

□ **Educational Partner Engagement & Governance**

Transparency in charter school governance has been a particular focus of authorizers and organized labor in criticizing charter schools. The Consulting Services team provides a variety of support services for schools needing to develop a coherent plan for consistent student/parent/community engagement for input in the LCAP as well as other LEA, SEA, and Federal plans.

□ **LCAP**

The three-year plan aligned to CA's Eight State Priorities has become crucial to how the charter school sets its accountability standards for growth over the term of the LCAP. Ideally, the Consulting Services team works with a school to develop the initial plan to ensure all required metrics meet the State requirements, as well as assisting in the development of responses to the varied prompts in the state template. Note: there are three different levels of support offered to align to your needs.

□ **LCAP Federal Addendum** The federal addendum is a one-time requirement, last completed in June 2019 to account for the use of federal title funds in a manner that supplements state and local funds for the educational program.

□ **Charter Renewal**

Support for the charter school leadership in developing the charter renewal petition for submission to the authorizer. Members of the Consulting Services team are uniquely positioned for this work based on experiences with a variety of authorizers throughout the State of California. Additionally, the team maintains relationships with charter advocacy groups and the CDE to ensure a charter school considers political and strategic issues. Note: there are three different levels of support offered to align to your needs.

□ **State/Federal Programs Compliance for FPM**

FPM is a program review and the use of federal Title funds for specialized instructional programs targeted to the neediest students. Note: there are three different levels of support offered to align to your needs.

□ **Board Training**

CSMC are experts in providing high quality board training on multiple topics. Governing Best Practices; Brown Act Compliance; Board Roles and Responsibilities; Fiscal Management and Oversight are a few recurring topics.

Master Services Agreement Between CSMC & Charter School

This Master Services Agreement ("Agreement") is entered into as of **July 01, 2025** ("Effective Date"), by and between Charter School Management Corporation ("CSMC"), and Charter School ("Charter School" or "Client"), for CSMC's provision of back-office services to Charter School on the terms set forth herein:

1. **Term:** The term of this Agreement shall be from the Effective Date until June 30, 2030 (the "Initial Term").
2. **Services:** CSMC shall perform the services outlined in the Scope of Services attached hereto and incorporated herein, which may include finance and accounting, payroll and human resources support, business consulting, board meeting support, facilities guidance, compliance, and charter development and grants administration support services. Upon mutual written agreement, the parties may modify the Scope of Services by revising the Scope of Services at any time.
3. **Excluded Services:** Other than the Services outlined in the Scope of Services, CSMC is not responsible for any other services, unless mutually agreed to in writing. Examples of excluded services include but are not limited to, legal services or legal costs, technology installation and support, purchasing of small items or curriculum materials, printing and graphic arts, grant-writing or fund-raising, hiring, meetings with outside parties (e.g., the Charter School Board or authorizer) beyond those meetings required to accomplish the Services, Special Education administration, testing, assessment, compliance with the Every Student Succeeds Act, compliance with government grant requirements, audits, attendance accounting, employee performance reviews, Student Information Systems support, and other outside professional services costs ("Excluded Services"). If the Charter School wishes to obtain Student Information Systems support, the parties shall enter into a supplemental service level agreement that outlines the parameters of all student data services.
4. **Compensation:** In exchange for CSMC's provision of the Services, Charter School agrees to pay as follows:
 - a. **Services Fee:** CSMC does not solely base its fees on the number of students at a charter school. Instead, it provides an economic, tailored flat rate that is a result of CSMC's discussion with the school about its specific needs. The fee for Services for Charter School shall be as outlined in the Scope of Service ("Services Fee"). This Services Fee shall apply to the provision of Services starting **July 01, 2025**
 - i. **Revision of Services Fee During Term:** Upon mutual written agreement, the parties may modify the Services Fee by revising the Scope of Services at any time, e.g., to reflect an agreed-upon change in the scope of Services. CSMC also closely tracks the hours it spends on performing the tasks for Charter School. If at any time CSMC or Charter School believes the Services Fee does not accurately reflect the amount of work and resources expended by CSMC, the parties shall enter good faith discussions to increase or decrease the Services Fee.
 - b. **The rate for A La Carte Services:** Should Charter School desire a la carte services at any time during the Term, CSMC would be pleased to provide such a la carte services subject to CSMC's capacity and written agreement.

- i. The A la carte services may include but not be limited to grant-writing (e.g., PCSGP), any in-person board attendance beyond 24 hours in a year, drafting new and renewal charter petitions, facility acquisition and lease negotiation support, and charter revocation and notice compliance support, document subpoena or testimony support, and implementation of computer systems.

For services work, CSMC shall produce invoices for services and all expenses due to CSMC. Payment for all services and expenses are due upon presentation of invoices. CSMC reserves the right to suspend the provision of Services in the event an invoice is 30 days past due.

Additionally, CSMC retains the right to assess a 1 % per month (12 % per annum) late charge or the maximum legal rate of interest, whichever is less, on unpaid balances that are over 30 days past due.

Charter School shall reimburse CSMC for all reasonable costs incurred, including reasonable attorney's fees, in collecting past due amounts owed by Charter School.

5. **Charter School Obligations:** In addition to the obligations listed in the Scope of Services, Charter School shall be responsible for the following:
 - a. **Timely Submission of Information:** To provide the Services, CSMC relies on Charter School to provide timely, accurate, and complete information, and to cooperate reasonably with CSMC. CSMC shall not be responsible for any missed deadlines if Charter School and/or Charter School's contractors (e.g., auditors) fail to timely provide necessary information and materials to CSMC. A submission is timely under this Agreement if CSMC, in its sole discretion, determines it has sufficient time to complete its required tasks.
 - b. **Right to Rely:** CSMC has the right to rely upon the truthfulness, completeness, and accuracy of the information and data provided by Charter School, its directors, officers, employees, and agents. CSMC shall not be expected to, and Charter School may not rely on CSMC to, discover and disclose errors, fraudulent financial reporting, misappropriation of assets, or illegal acts that may exist at one or more schools or offices operated by Charter School. Charter School understands and agrees that CSMC has no responsibility to identify and communicate deficiencies in Charter School's internal controls as part of CSMC's provision of Services under this Agreement.
 - c. **Notice of Material Changes:** Charter School shall immediately inform CSMC of any material change in Charter School or Charter School's operations that might impact CSMC's ability to provide the Services under this Agreement.
 - d. **Compliance:** CSMC's services will assist Charter School's back-office operations, but CSMC shall not be responsible for auditing Charter School's information and operations for completeness and compliance. Charter School is solely responsible for adopting and adhering to reasonable policies and procedures, and for ensuring the Charter School remains in compliance with all applicable rules and regulations, its charter(s) and any MOUs or other contracts, and sound fiscal operations.
 - e. **Direction:** Charter School acknowledges that by providing the Services, CSMC performs an advisory and task-related function, and therefore provides the Services at the direction of Charter School.

Charter School retains ultimate decision-making authority on the execution of agreements, transactions, and payments, and the determination of rights, processes, controls, and obligations rests entirely in the discretion and control of Charter School. The Charter School is responsible for attendance tracking and reviewing employee performance.

6. **Document Retention:** Charter School shall be responsible for providing CSMC with all records pertinent to the Services, including information stored electronically such as e-mails and other computerized records. Charter School agrees to retain, and not destroy, such records for the duration of any period mandated by applicable laws. CSMC shall retain its files for 3 years or may return them to Charter School, after which time CSMC shall destroy its files unless Charter School requests in writing that CSMC retain files for a shorter or longer retention period.
7. **No Legal Services:** Charter School acknowledges and agrees that CSMC does not provide legal services or licensed accounting services, and such licensed professional services are not included within the services which CSMC may provide under this Agreement. Charter School agrees to consult a lawyer and/or licensed accountant if Charter School seeks legal or accounting advice, and shall not rely on CSMC for such advice, consultation, or services.
8. **Support Regarding Charter Notices and Revocation:** Unless expressly included within the Services or otherwise mutually agreed upon by the parties, CSMC shall not be responsible to perform any services related to any charter revocation, notice to cure, a notice of concern, or related notices, and CSMC shall not be responsible for performing any services related to any closure of any school operated by Charter School.
9. **Limitation of Services:** CSMC cannot guarantee that the Services it provides under this Agreement will yield the results sought by Charter School. CSMC will use good faith efforts in providing Services to secure the reasonable objectives sought by Charter School during CSMC's performance of its Services under this Agreement. Charter School understands and agrees that it is retaining CSMC to perform only those Services defined herein and in the Scope of Services. Charter School agrees that CSMC will have no liability for, or indemnity obligations arising out of, CSMC's provision of any services, task, or work not included within the definition of Services.
10. **Limitation of Liability:** The parties agree that CSMC's liability for all claims, damages, and costs (including legal fees) of the Charter School arising from this Agreement is limited to \$100,000. In addition, Charter School expressly agrees to waive (among other damages) all punitive and exemplary damages in any proceeding.
11. **Disclaimer of Warranties:** CSMC makes no representations or warranties, express or implied, regarding its services, including but not limited to any warranties of merchantability, fitness for a particular purpose, non-infringement, accuracy, or uninterrupted or error-free performance. Charter School acknowledges that the success or effectiveness of services depends on various factors beyond the control of CSMC. CSMC makes no warranties that include or involve the use of third-party products, software, or services, and disclaims all liability for any defects, errors, or failures related to them.
12. **Limitation of Liability for Referral:** The Services which CSMC is required to perform under this Agreement do not include referring Charter School to any other service provider, person, or company. If CSMC is asked and elects to make a referral, Charter School acknowledges and agrees that Charter School shall be solely responsible for interviewing, researching, and retaining any such service provider, person, or company, and

Charter School shall rely on its assessment in making any hiring decision. CSMC does not warrant or guarantee the services, work, or results of any service provider, person, or company that CSMC may refer to Charter School.

13. **Employee Recruitment Restriction:** Charter School recognizes and acknowledges that CSMC expends considerable time and effort and incurs substantial costs in recruiting, training, and retaining qualified personnel. Charter School agrees to not hire as an employee or independent contractor, either directly or indirectly, any employee of CSMC, who has provided services to Charter School under this Agreement, during the term of this Agreement and for a period of 12 months after such person terminates employment with CSMC. Charter School agrees that a breach of the foregoing restriction would cause irreparable harm to CSMC's business, and the damages therefrom would be difficult if not impossible to measure. Consequently, if Charter School breaches this provision, Charter School agrees to pay CSMC an amount equal to 100 % of the individual's projected annual compensation from CSMC.
14. **Governing Law and Dispute Resolution:** This Agreement shall be construed in accordance with the laws of the State of **CA**. CSMC and Charter School agree that all disputes or controversies of any nature relating to or arising at any time under this Agreement or otherwise in connection with the rights and obligations under this Agreement shall be resolved by binding arbitration, which shall constitute the sole forum for any disputes between the parties to this Agreement. This means by signing this Agreement, each party is waiving the right to take court action and is waiving the right to a jury. Each party also agrees to and hereby does, waive any right to compel the other party to participate as a defendant, cross-defendant, or in any other capacity in any court action, including any action for indemnity. The arbitration shall be governed by the JAMS Comprehensive Arbitration Rules and Procedures conducted in California. The parties to this Agreement further agree that any arbitration demand must be filed with JAMS within 12 months from the time of any breach of this Agreement and that any claim commenced or filed after that time shall be time-barred as a matter of law.
15. **Termination:**
 - a. Either party may terminate this Agreement for breach of a material term or condition of this Agreement upon 60 days written notice to the other party. Such written notice shall specifically identify the breach and provide 30 days to cure. Upon any termination under this section, Charter School shall pay CSMC for all services rendered by CSMC before the effective date of termination.
 - b. CSMC may terminate this Agreement immediately upon written notice and without liability in the event: *(i) Charter School, in CSMC's reasonable judgment, violates any of its obligations described in Section 4. Upon any termination under this section, Charter School shall pay CSMC for all services rendered by CSMC before the effective date of termination, and Charter School shall also pay CSMC for all costs resulting from such early termination, such as costs related to demobilization.*
16. **Insurance:** Charter School represents and warrants that it has obtained property general liability insurance, workers compensation insurance, automobile insurance (to the extent applicable), and insurance coverage for negligence, errors and omissions/educators' legal liability, abuse and molestation, and employment practices liability as may be required and in amounts as outlined in its charter(s).

17. **Indemnification:** Charter School shall indemnify CSMC and hold harmless its directors, officers, employees, and agents from and against all actions, claims, damages, and losses, including attorney's fees that may arise out of or in any way result from the negligent or intentional acts, errors, or omissions of Charter School. To the extent that Charter School properly directs CSMC, and to the extent that CSMC fails to properly perform the Services, CSMC shall indemnify and hold Charter School and its officers and employees harmless from and shall defend at its own expense all claims, demands, or suits at law or equity arising in whole or in part, but only to the extent that they arise from CSMC's active negligence or express breach of its obligations under this Agreement. Nothing in this Agreement shall require CSMC to indemnify Charter School against claims, demands, or suits based upon intentional or negligent acts of Charter School, its agents, officers, or employees.
18. **Proprietary Information:** The parties acknowledge and agree that during this Agreement they may have access to certain information proprietary to each other, which may include but are not limited to trade secrets, policies, procedures, intellectual property, business or strategic plans, contractual arrangements or negotiations, financial information, and employee information (collectively, the "Proprietary Information"). Each party's Proprietary Information shall be and remain the sole property of that party at all times. Each party shall maintain the confidentiality of all Proprietary Information to the extent applicable and shall not divulge such information to any third parties, except (i) *as may be necessary for the discharge of its obligations under this Agreement and (ii) as required by law*. Each party shall take reasonable precautions against disclosure of any of the other party's Proprietary Information to unauthorized persons by any of its officers, directors, employees, or agents. If either party receives a request for disclosure of the other party's information, including Proprietary Information, (whether according to a CA Public Records Act request or otherwise), the party that received the request shall provide the other party with prompt notice of the request. Each party agrees to keep all communications and work products confidential to the extent allowable by law.
19. **No Joint Venture:** The parties acknowledge that they will not hold themselves out as an agent, partner, or co-venturer of the other and that this Agreement is not intended and does not create any agency, partnership, joint venture, or any other type of relationship except the contract relationships established herein. CSMC shall be free to provide similar services to other clients.
20. **Parties Are Sole Obligors:** This Agreement is entered into by the Charter School for itself alone and not on behalf of, or as an agent for, any other entity, agency, school, or school district. Any obligation of the parties to this Agreement is and shall remain the sole responsibility of the parties. CSMC agrees that no employee, executive, officer, or director of Charter School shall be personally liable for payment or any breach of this Agreement and that CSMC may only look to Charter School for payment or performance of the obligations required under this Agreement. Likewise, Charter School agrees that no employee, executive, shareholder, officer, or director of CSMC shall be personally liable for payment or any breach of this Agreement and that Charter School may only look to CSMC for payment or performance of the obligations required under this Agreement. In addition, CSMC will be providing Services only to Charter School under this Agreement and will not be required to perform work or services to any company or person affiliated with Charter School.

- 21. **Communication Between Parties:** Charter School will direct all communication to the CSMC Account Manager and/or the School Business Manager. CSMC will direct all communication to Charter School's designated primary contact defined in the Notice section below.
- 22. **Notice:** All notices, requests, offers or demands, or other communications (each, a "Notice") given to or by the parties under this Agreement shall be in writing and shall be deemed to have been duly given on the date of service if personally served on the party to whom notice is to be given, by electronic mail at the address below, or seventy-two (72) hours after mailing by United States mail first class, registered or certified mail, postage prepaid, addressed to the party to whom notice is to be given, at such party's address set forth below, or such other address for such party as shall be specified in a notice given under this Section.

CSMC	Innovations Academy
<p>CSMC 43460 Ridge Park Dr. Temecula, CA 92590 slanni@csmci.com Attn: Sandro Lanni</p>	<p>Innovations Academy 5454 Ruffin Road San Diego, CA , 92123 christine@innovationsacademy.org Attn: Christine Kuglen</p>

- 23. **Headings:** The descriptive headings of the sections and paragraphs of this Agreement are inserted for convenience only, are not part of this Agreement, and do not in any way limit or amplify the terms or provisions of this Agreement.
- 24. **Assignment:** Charter School shall not assign this Agreement, any interest in this Agreement, or any of its rights or obligations under this Agreement without the express prior written consent of the CSMC. This Agreement shall be binding on and shall inure to the benefit of, the parties and their respective permitted successors and assigns. CSMC reserves the right, in its sole discretion, to subcontract Services to qualified subcontractors.
- 25. **Entire Agreement:** This Agreement, including its attachments, constitutes the entire agreement between the parties concerning the subject matter contained herein and supersedes all agreements, representations, and understandings of the parties concerning such subject matter made or entered into before the date of this Agreement.
- 26. **Compliance with Laws:** Each party agrees to comply with all applicable laws in connection with the performance of such party's obligations under this Agreement and the operation of such party's business. As used herein, "law" means any federal, state, local or foreign law, statute, ordinance, franchise, permit, concession, license, write, rule, regulation, order, injunction, judgment, or decree.
- 27. **Amendments:** No supplement, modification, or amendment of this Agreement shall be binding unless executed in writing by both parties.

- 28. **No Waiver:** No waiver of any provision of this Agreement shall constitute, or be deemed to constitute, a waiver of any other provision, nor shall any waiver constitute a continuing waiver. No waiver shall be binding unless executed in writing by the party making the waiver.
- 29. **Severability:** If any provision of this Agreement is invalid or contravenes CA law, such provision shall be deemed not to be a part of this Agreement and shall not affect the validity or enforceability of its remaining provisions, unless such invalidity or unenforceability would defeat an essential business purpose of this Agreement.
- 30. **Force Majeure:** Neither Party shall be liable for any delay or failure to perform its obligations under this Agreement due to any cause beyond its reasonable control, including but not limited to acts of God, war, terrorism, riots, embargoes, strikes, lockouts, fires, floods, earthquakes, or other natural disasters (each, a “Force Majeure Event”). The Party affected by a Force Majeure Event shall promptly notify the other Party of the Force Majeure Event and shall use commercially reasonable efforts to mitigate the effects of the Force Majeure Event. The Party affected by a Force Majeure Event shall be excused from the performance of its obligations under this Agreement for the duration of the Force Majeure Event, provided that such Party shall use commercially reasonable efforts to resume performance of its obligations as soon as reasonably practicable.
- 31. **Counterparts - Electronic Signatures:** This Agreement may be executed in two or more counterparts, each of which shall be deemed an original and all of which together shall constitute one instrument. A faxed copy or. A PDF copy of the fully executed original version of this Agreement shall have the same legal effect as an executed original for all purposes.

Please note that CSMC does not provide legal services and all work should be reviewed by Charter School's legal counsel as appropriate. Please also note that we will review and possibly revise these fees after the first year if there are appreciable student enrollment changes.

Charter School Management Corporation
Name: Sandro Lanni
Title: President
Date:
Signature:

Innovations Academy
Name: Christine Kuglen
Title: Executive Director
Date:
Signature:

Innovations Academy

2023-2024 School Accountability Report Card (Published During the 2024-2025 School Year)



General Information about the School Accountability Report Card (SARC)

SARC Overview



By February 1 of each year, every school in California is required by state law to publish a School Accountability Report Card (SARC). The SARC contains information about the condition and performance of each California public school. Under the Local Control Funding Formula (LCFF) all local educational agencies (LEAs) are required to prepare a Local Control and Accountability Plan (LCAP), which describes how they intend to meet annual school-specific goals for all pupils, with specific activities to address state and local priorities. Additionally, data reported in an LCAP is to be consistent with data reported in the SARC.

- For more information about SARC requirements and access to prior year reports, see the California Department of Education (CDE) SARC web page at <https://www.cde.ca.gov/ta/ac/sa/>.
- For more information about the LCFF or the LCAP, see the CDE LCFF web page at <https://www.cde.ca.gov/fg/aa/lc/>.
- For additional information about the school, parents/guardians and community members should contact the school principal or the district office.

A hard copy of the School Accountability Report Card is available at your School Office, upon request.

DataQuest



DataQuest is an online data tool located on the CDE DataQuest web page at <https://dq.cde.ca.gov/dataquest/> that contains additional information about this school and comparisons of the school to the district and the county. Specifically, DataQuest is a dynamic system that provides reports for accountability (e.g., test data, enrollment, high school graduates, dropouts, course enrollments, staffing, and data regarding English learners).

California School Dashboard



The California School Dashboard (Dashboard) <https://www.caschooldashboard.org/> reflects California's new accountability and continuous improvement system and provides information about how LEAs and schools are meeting the needs of California's diverse student population. The Dashboard contains reports that display the performance of LEAs, schools, and student groups on a set of state and local measures to assist in identifying strengths, challenges, and areas in need of improvement.

Internet Access

Internet access is available at public libraries and other locations that are publicly accessible (e.g., the California State Library). Access to the Internet at libraries and public locations is generally provided on a first-come, first-served basis. Other use restrictions may include the hours of operation, the length of time that a workstation may be used (depending on availability), the types of software programs available on a workstation, and the ability to print documents.

Admission Requirements for the University of California (UC)

Admission requirements for the UC follow guidelines set forth in the Master Plan, which requires that the top one-eighth of the state's high school graduates, as well as those transfer students who have successfully completed specified college course work, be eligible for admission to the UC. These requirements are designed to ensure that all eligible students are adequately prepared for University-level work. For general admissions requirements, please visit the UC Admissions Information website at <https://admission.universityofcalifornia.edu/>.

Admission Requirements for the California State University (CSU)

Eligibility for admission to the CSU is determined by three factors: (1) Specific high school courses, (2) Grades in specified courses and test scores, and (3) Graduation from high school. Some campuses have higher standards for particular majors or students who live outside the local campus area. Because of the number of students who apply, a few campuses have higher standards (supplementary admission criteria) for all applicants. Most CSU campuses have local admission guarantee policies for students who graduate or transfer from high schools and colleges that are historically served by a CSU campus in that region. For admission, application, and fee information, see the CSU website at <https://www2.calstate.edu/>.

2024-25 School Contact Information

School Name	Innovations Academy
Street	5454 Ruffin Rd.
City, State, Zip	San Diego, CA 92123
Phone Number	858-271-1414
Principal	Christine Kuglen
Email Address	info@innovationsacademy.org
School Website	innovationsacademy.org
Grade Span	K-8
County-District-School (CDS) Code	37683380118083

2024-25 District Contact Information

District Name	Innovations Academy
Phone Number	858-271-1414
Superintendent	Christine Kuglen
Email Address	info@innovationsacademy.org
District Website	www.innovationsacademy.org

2024-25 School Description and Mission Statement

At Innovations Academy (IA) charter school, we powerfully create our lives through self-expression, compassionate connection, and purposeful learning. Our constructivist-based K-8 school teaches through student-centered activities and inquiry focused learning which includes projects, performance and other interactive learning. We utilize a relationship based discipline program for classroom and campus behavior management and skill building.

At Innovations Academy, children learn in an environment that respects the intellectual, emotional, and social intelligence of all children. We use a multidimensional curriculum to support the innate human desire to learn.

2024-25 School Description and Mission Statement

At least 80% of our population attends school in an engaging five day structure. The other 20% of our school population participates in our independent study program. For these home schooling families, Innovations Academy offers a 3-day program for grades K-2, and a 2-day program, known as the Home Learner Community, for grades K-8. Please visit our website for additional information about these programs.

About this School

2023-24 Student Enrollment by Grade Level

Grade Level	Number of Students
Kindergarten	37
Grade 1	47
Grade 2	56
Grade 3	50
Grade 4	55
Grade 5	59
Grade 6	41
Grade 7	42
Grade 8	47
Total Enrollment	434

2023-24 Student Enrollment by Student Group

Student Group	Percent of Total Enrollment
Female	47.2
Male	52.5
Non-Binary	0.2
American Indian or Alaska Native	0.5
Asian	5.8
Black or African American	4.4
Filipino	1.4
Hispanic or Latino	25.8
Native Hawaiian or Pacific Islander	1.2
Two or More Races	14.3
White	43.8
English Learners	4.6
Socioeconomically Disadvantaged	29.7
Students with Disabilities	24

A. Conditions of Learning **State Priority: Basic**

The SARC provides the following information relevant to the State priority: Basic (Priority 1):

- Degree to which teachers are appropriately assigned and fully credentialed in the subject area and for the pupils they are teaching;
- Pupils have access to standards-aligned instructional materials; and
- School facilities are maintained in good repair.

2020-21 Teacher Preparation and Placement

Authorization/Assignment	School Number	School Percent	District Number	District Percent	State Number	State Percent
Fully (Preliminary or Clear) Credentialed for Subject and Student Placement (properly assigned)	17.70	70.99	5313.50	88.64	228366.10	83.12
Intern Credential Holders Properly Assigned	3.00	12.00	51.00	0.85	4205.90	1.53
Teachers Without Credentials and Misassignments (“ineffective” under ESSA)	1.00	4.00	191.10	3.19	11216.70	4.08
Credentialed Teachers Assigned Out-of-Field (“out-of-field” under ESSA)	1.70	7.00	194.90	3.25	12115.80	4.41
Unknown/Incomplete/NA	1.50	6.00	243.90	4.07	18854.30	6.86
Total Teaching Positions	24.90	100.00	5994.60	100.00	274759.10	100.00

Note: The data in this table is based on full-time equivalent (FTE) status. One FTE equals one staff member working full-time; one FTE could also represent two staff members who each work 50 percent of full-time. Additionally, an assignment is defined as a position that an educator is assigned based on setting, subject, and grade level. An authorization is defined as the services that an educator is authorized to provide to students.

2021-22 Teacher Preparation and Placement

Authorization/Assignment	School Number	School Percent	District Number	District Percent	State Number	State Percent
Fully (Preliminary or Clear) Credentialed for Subject and Student Placement (properly assigned)	17.00	77.27	5336.60	88.47	234405.20	84.00
Intern Credential Holders Properly Assigned	1.00	4.55	66.90	1.11	4853.00	1.74
Teachers Without Credentials and Misassignments (“ineffective” under ESSA)	3.00	13.64	219.20	3.64	12001.50	4.30
Credentialed Teachers Assigned Out-of-Field (“out-of-field” under ESSA)	0.00	0.00	219.20	3.63	11953.10	4.28
Unknown/Incomplete/NA	1.00	4.55	189.70	3.15	15831.90	5.67
Total Teaching Positions	22.00	100.00	6031.80	100.00	279044.80	100.00

Note: The data in this table is based on Full-Time Equivalent (FTE) status. One FTE equals one staff member working full time; one FTE could also represent two staff members who each work 50 percent of full time. Additionally, an assignment is defined as a position that an educator is assigned based on setting, subject, and grade level. An authorization is defined as the services that an educator is authorized to provide to students.

2022-23 Teacher Preparation and Placement

Authorization/Assignment	School Number	School Percent	District Number	District Percent	State Number	State Percent
Fully (Preliminary or Clear) Credentialed for Subject and Student Placement (properly assigned)	7.80	85.48	5233.70	86.54	231142.40	100.00
Intern Credential Holders Properly Assigned	0.00	0.00	74.50	1.23	5566.40	2.00
Teachers Without Credentials and Misassignments (“ineffective” under ESSA)	0.60	7.21	354.70	5.87	14938.30	5.38
Credentialed Teachers Assigned Out-of-Field (“out-of-field” under ESSA)	0.00	0.00	221.00	3.65	11746.90	4.23
Unknown/Incomplete/NA	0.60	7.21	163.60	2.71	14303.80	5.15
Total Teaching Positions	9.10	100.00	6047.70	100.00	277698	100

Note: The data in this table is based on Full-Time Equivalent (FTE) status. One FTE equals one staff member working full time; one FTE could also represent two staff members who each work 50 percent of full time. Additionally, an assignment is defined as a position that an educator is assigned based on setting, subject, and grade level. An authorization is defined as the services that an educator is authorized to provide to students.

Teachers Without Credentials and Misassignments (considered “ineffective” under ESSA)

Authorization/Assignment	2020-21	2021-22	2022-23
Permits and Waivers	0.00	0.00	0
Misassignments	1.00	3.00	0.6
Vacant Positions	0.00	0.00	0
Total Teachers Without Credentials and	1.00	3.00	0.6

Credentialed Teachers Assigned Out-of-Field (considered “out-of-field” under ESSA)

Indicator	2020-21	2021-22	2022-23
Credentialed Teachers Authorized on a Permit or Waiver	1.00	0.00	0
Local Assignment Options	0.70	0.00	0
Total Out-of-Field Teachers	1.70	0.00	0

Class Assignments

Indicator	2020-21	2021-22	2022-23
Misassignments for English Learners (a percentage of all the classes with English learners taught by teachers that are misassigned)	0.00	12.5	72.7
No credential, permit or authorization to teach (a percentage of all the classes taught by teachers with no record of an authorization to teach)	10.50	2.9	41.1

Note: For more information refer to the Updated Teacher Equity Definitions web page at <https://www.cde.ca.gov/pd/ee/teacherequitydefinitions.asp>.

2024-25 Quality, Currency, Availability of Textbooks and Other Instructional Materials

Year and month in which the data were collected		August 2020	
Subject	Textbooks and Other Instructional Materials/year of Adoption	From Most Recent Adoption ?	Percent Students Lacking Own Assigned Copy
Reading/Language Arts	Innovations Academy uses an ample variety of resources that enable teachers to create a hands-on, interactive, inquiry-centered approach to learning and to differentiate instruction for individual students. Included among the standards aligned and research-based resources/tools are primary resources (US Constitution, scientific papers and articles...), software, nonfiction and fiction literature and chromebooks. Programs we utilize include RazKids, Reading A-Z, Ufli, Jennifer Serravallo, Spellography, Touchstones/Touchpebbles, Reading Reconsidered and Reading Eggs.	Yes	0
Mathematics	Innovations Academy uses an ample variety of resources that enable teachers to create a hands-on, interactive, inquiry centered approach to learning and to differentiate instruction for individual students in the area of Mathematics. Included among the standards aligned and research-based resources are adaptive textbooks, manipulatives, calculators and chromebooks. Programs we utilize include Beast Academy, Illustrative Math, Desmos, STMATH, Marcy Cook, Mountain Math, Youcubed, Math Solutions.	Yes	0
Science	Innovations Academy uses an ample variety of resources that enable teachers to create a hands-on, interactive, inquiry centered approach to learning and to differentiate instruction for individual students. Included among the standards aligned and research-based resources/tools are primary resources (scientific articles), software, microscopes, field study, guest experts, calculators and chromebooks. Programs we utilize include Mystery Science, KnowAtom, FOSS kits. Teachers also generate interdisciplinary real world based projects for science learning that they facilitate with students. Included in these projects is interaction with professionals and professional and nonprofit organizations.	Yes	0

History-Social Science	Innovations Academy uses an ample variety of resources that enable teachers to create a hands-on, interactive, inquiry centered approach to learning and to differentiate instruction for individual students. Included among the standards aligned and research-based resources/tools are primary resources, software, art materials, maps, globes and chromebooks. Programs we utilize include History Alive!, PBS Media, Brainpop and ThinkLaw. Teachers also generate interdisciplinary real world based projects for history, geography, civics and other social studies learning.	Yes	0
Foreign Language	Innovations Academy uses an ample variety of resources that enable teachers to create a hands-on, interactive, inquiry centered approach to learning and to differentiate instruction for individual students under the instruction of a full-time credentialed Spanish teacher for our middle school students. Included among the standards aligned and research-based resources/tools are primary resources, software, art materials, chromebooks. We also utilize DuoLingo to supplement as needed.	Yes	0
Health	Our human sexuality curriculum draws from a variety of resources for middle school with a mandatory class taught to all 7th graders. In the 2023-24 school year our 5th grade students received instruction on changes during puberty. Other health is taught by teachers via projects and lessons from a variety of resources that enable classes to experience a hands-on, interactive, inquiry centered approach. Physical education is taught by our coach who utilizes a skills based approach teaching a variety of sports (the skills, rules and sportsmanship) in our gym.	Yes	0
Visual and Performing Arts	Visual and Performing Arts are incorporated into instruction. Our students have fine arts, ceramics and performing arts instructors who work with all grade levels utilizing primary materials.	Yes	0

Note: Cells with N/A values do not require data.

School Facility Conditions and Planned Improvements

We moved into a brand new building in August 2020 that was built according to DSA specifications. Everything is inspected regularly and repaired as needed. Our facility is kept in good repair by a team of maintenance and repair workers. Our playground is a nature based playground. Students and teachers have been planting native plants to enhance those already living there.

Year and month of the most recent FIT report

1/14/25

System Inspected	Rate Good	Rate Fair	Rate Poor	Repair Needed and Action Taken or Planned
Systems: Gas Leaks, Mechanical/HVAC, Sewer	X			
Interior: Interior Surfaces	X			
Cleanliness: Overall Cleanliness, Pest/Vermin Infestation	X			
Electrical	X			

School Facility Conditions and Planned Improvements

Restrooms/Fountains: Restrooms, Sinks/ Fountains	X			
Safety: Fire Safety, Hazardous Materials	X			
Structural: Structural Damage, Roofs	X			
External: Playground/School Grounds, Windows/ Doors/Gates/Fences	X			

Overall Facility Rate

Exemplary	Good	Fair	Poor
X			

B. Pupil Outcomes

State Priority: Pupil Achievement

The SARC provides the following information relevant to the State priority: Pupil Achievement (Priority 4):

Statewide Assessments

(i.e., California Assessment of Student Performance and Progress [CAASPP] System includes the Smarter Balanced Summative Assessments for students in the general education population and the California Alternate Assessments [CAAs] for English language arts/literacy [ELA] and mathematics given in grades three through eight and grade eleven. Only eligible students may participate in the administration of the CAAs. CAAs items are aligned with alternate achievement standards, which are linked with the Common Core State Standards [CCSS] for students with the most significant cognitive disabilities).

The CAASPP System encompasses the following assessments and student participation requirements:

1. **Smarter Balanced Summative Assessments and CAAs for ELA** in grades three through eight and grade eleven.
2. **Smarter Balanced Summative Assessments and CAAs for mathematics** in grades three through eight and grade eleven.
3. **California Science Test (CAST) and CAAs for Science** in grades five, eight, and once in high school (i.e., grade ten, eleven, or twelve).

College and Career Ready

The percentage of students who have successfully completed courses that satisfy the requirements for entrance to the University of California and the California State University, or career technical education sequences or programs of study.

Percentage of Students Meeting or Exceeding the State Standard on CAASPP

This table displays CAASPP test results in ELA and mathematics for all students grades three through eight and grade eleven taking and completing a state-administered assessment.

To protect student privacy, double dashes (--) are used in the table when the cell size within a selected student population is ten or fewer.

ELA and mathematics test results include the Smarter Balanced Summative Assessment and the CAA. The “Percent Met or Exceeded” is calculated by taking the total number of students who met or exceeded the standard on the Smarter Balanced Summative Assessment plus the total number of students who met the standard (i.e., achieved Level 3–Alternate) on the CAAs divided by the total number of students who participated in both assessments.

Subject	School 2022-23	School 2023-24	District 2022-23	District 2023-24	State 2022-23	State 2023-24
English Language Arts/Literacy (grades 3-8 and 11)	69	61	52	52	46	47
Mathematics (grades 3-8 and 11)	58	45	40	41	34	35

2023-24 CAASPP Test Results in ELA by Student Group

This table displays CAASPP test results in ELA by student group for students grades three through eight and grade eleven taking and completing a state-administered assessment.

ELA test results include the Smarter Balanced Summative Assessment and the CAA. The “Percent Met or Exceeded” is calculated by taking the total number of students who met or exceeded the standard on the Smarter Balanced Summative Assessment plus the total number of students who met the standard (i.e., achieved Level 3–Alternate) on the CAA divided by the total number of students who participated in both assessments.

To protect student privacy, double dashes (--) are used in the table when the cell size within a selected student population is ten or fewer.

Note: The number of students tested includes all students who participated in the test whether they received a score or not; however, the number of students tested is not the number that was used to calculate the achievement level percentages. The achievement level percentages are calculated using only students who received scores.

CAASPP Student Groups	CAASPP Total Enrollment	CAASPP Number Tested	CAASPP Percent Tested	CAASPP Percent Not Tested	CAASPP Percent Met or Exceeded
All Students	296	293	98.99	1.01	61.09
Female	140	140	100.00	0.00	66.43
Male	155	152	98.06	1.94	55.92
American Indian or Alaska Native	--	--	--	--	--
Asian	16	16	100.00	0.00	50.00
Black or African American	14	14	100.00	0.00	21.43
Filipino	--	--	--	--	--
Hispanic or Latino	70	69	98.57	1.43	65.22
Native Hawaiian or Pacific Islander	--	--	--	--	--
Two or More Races	53	51	96.23	3.77	58.82

White	134	134	100.00	0.00	64.18
English Learners	--	--	--	--	--
Foster Youth	0	0	0	0	0
Homeless	0	0	0	0	0
Military	0	0	0	0	0
Socioeconomically Disadvantaged	83	81	97.59	2.41	55.56
Students Receiving Migrant Education Services	0	0	0	0	0
Students with Disabilities	79	78	98.73	1.27	48.72

2023-24 CAASPP Test Results in Math by Student Group

This table displays CAASPP test results in Math by student group for students grades three through eight and grade eleven taking and completing a state-administered assessment.

Mathematics test results include the Smarter Balanced Summative Assessment and the CAA. The “Percent Met or Exceeded” is calculated by taking the total number of students who met or exceeded the standard on the Smarter Balanced Summative Assessment plus the total number of students who met the standard (i.e., achieved Level 3–Alternate) on the CAA divided by the total number of students who participated in both assessments.

To protect student privacy, double dashes (--) are used in the table when the cell size within a selected student population is ten or fewer.

Note: The number of students tested includes all students who participated in the test whether they received a score or not; however, the number of students tested is not the number that was used to calculate the achievement level percentages. The achievement level percentages are calculated using only students who received scores.

CAASPP Student Groups	CAASPP Total Enrollment	CAASPP Number Tested	CAASPP Percent Tested	CAASPP Percent Not Tested	CAASPP Percent Met or Exceeded
All Students	296	293	98.99	1.01	45.05
Female	140	140	100.00	0.00	42.14
Male	155	152	98.06	1.94	47.37
American Indian or Alaska Native	--	--	--	--	--
Asian	16	16	100.00	0.00	62.50
Black or African American	14	14	100.00	0.00	14.29
Filipino	--	--	--	--	--
Hispanic or Latino	70	69	98.57	1.43	40.58
Native Hawaiian or Pacific Islander	--	--	--	--	--
Two or More Races	53	51	96.23	3.77	43.14
White	134	134	100.00	0.00	48.51
English Learners	--	--	--	--	--
Foster Youth	0	0	0	0	0
Homeless	0	0	0	0	0
Military	0	0	0	0	0

Socioeconomically Disadvantaged	83	81	97.59	2.41	37.04
Students Receiving Migrant Education Services	0	0	0	0	0
Students with Disabilities	79	78	98.73	1.27	38.46

CAASPP Test Results in Science for All Students

This table displays the percentage of all students grades five, eight, and High School meeting or exceeding the State Standard.

Science test results include the CAST and the CAA for Science. The “Percent Met or Exceeded” is calculated by taking the total number of students who met or exceeded the standard on the CAST plus the total number of students who met the standard (i.e., achieved Level 3–Alternate) on the CAA for Science divided by the total number of students who participated in a science assessment.

To protect student privacy, double dashes (--) are used in the table when the cell size within a selected student population is ten or fewer.

The number of students tested includes all students who participated in the test whether they received a score or not; however, the number of students tested is not the number that was used to calculate the achievement level percentages. The achievement level percentages are calculated using only students who received scores.

Subject	School 2022-23	School 2023-24	District 2022-23	District 2023-24	State 2022-23	State 2023-24
Science (grades 5, 8 and high school)	56.47	52.38	38.07	38.48	30.29	30.73

2023-24 CAASPP Test Results in Science by Student Group

This table displays CAASPP test results in Science by student group for students grades five, eight, and High School. Double dashes (--) appear in the table when the number of students is ten or less, either because the number of students in this category is too small for statistical accuracy or to protect student privacy.

Student Group	Total Enrollment	Number Tested	Percent Tested	Percent Not Tested	Percent Met or Exceeded
All Students	106	105	99.06	0.94	52.38
Female	55	55	100.00	0.00	47.27
Male	50	49	98.00	2.00	57.14
American Indian or Alaska Native	0	0	0	0	0
Asian	--	--	--	--	--
Black or African American	--	--	--	--	--
Filipino	--	--	--	--	--
Hispanic or Latino	23	23	100.00	0.00	47.83
Native Hawaiian or Pacific Islander	--	--	--	--	--
Two or More Races	19	18	94.74	5.26	44.44
White	51	51	100.00	0.00	60.78
English Learners	0	0	0	0	0
Foster Youth	0	0	0	0	0
Homeless	0	0	0	0	0
Military	0	0	0	0	0
Socioeconomically Disadvantaged	31	31	100.00	0.00	35.48
Students Receiving Migrant Education Services	0	0	0	0	0
Students with Disabilities	25	25	100.00	0.00	56.00

B. Pupil Outcomes

State Priority: Other Pupil Outcomes

The SARC provides the following information relevant to the State priority: Other Pupil Outcomes (Priority 8): Pupil outcomes in the subject area of physical education.

2023-24 California Physical Fitness Test Results

This table displays the percentage of students participating in each of the five fitness components of the California Physical Fitness Test Results. The administration of the PFT requires only participation results for these five fitness areas. Percentages are not calculated and double dashes (--) appear in the table when the number of students tested is ten or less, either because the number of students in this category is too small for statistical accuracy or to protect student privacy.

Grade Level	Component 1: Aerobic Capacity	Component 2: Abdominal Strength and Endurance	Component 3: Trunk Extensor and Strength and Flexibility	Component 4: Upper Body Strength and Endurance	Component 5: Flexibility
Grade 5	100	98	98	98	98
Grade 7	98	98	98	98	98

C. Engagement

State Priority: Parental Involvement

The SARC provides the following information relevant to the State priority: Parental Involvement (Priority 3): Efforts the school district makes to seek parent input in making decisions regarding the school district and at each school site.

2024-25 Opportunities for Parental Involvement

At Innovations Academy, parents have many opportunities to be involved effectively. We invite parents to attend student-led conferences, presentations of learning, portfolio reviews, and exhibitions of student work. We welcome classroom volunteers, parent drivers and field trip chaperones. We have a very active parent group, called the Parent Connection, that sponsors several social activities each year and supports internal school activities as well. They meet on Zoom and in person. There are also opportunities to participate in school site meetings and LCAP development. Parents involve themselves in a variety of other ways such as volunteering in the classroom, speaking to a class about their profession, sending in materials for our enrichment program, donating their time at a fundraiser or school event. For information about volunteering at school, parents can come to the front office or contact info@innovationsacademy.org.

To keep our parents informed, IA sends weekly school announcements through an automated contact system (via email, text and voice) and teachers communicate via ParentSquare weekly. Parents have ongoing access to teachers. Parents are always welcome to speak with the director, Christine Kuglen, who also is available for drop-in meetings to connect with parents.

2023-24 Chronic Absenteeism by Student Group

Student Group	Cumulative Enrollment	Chronic Absenteeism Eligible Enrollment	Chronic Absenteeism Count	Chronic Absenteeism Rate
All Students	483	469	61	13.0
Female	235	230	30	13.0
Male	247	238	31	13.0
Non-Binary	--	--	--	--
American Indian or Alaska Native	--	--	--	--
Asian	25	25	1	4.0
Black or African American	25	25	13	52.0
Filipino	--	--	--	--
Hispanic or Latino	126	123	14	11.4
Native Hawaiian or Pacific Islander	--	--	--	--
Two or More Races	66	64	7	10.9
White	214	206	22	10.7
English Learners	20	20	2	10.0
Foster Youth	--	--	--	--
Homeless	--	--	--	--
Socioeconomically Disadvantaged	151	148	28	18.9
Students Receiving Migrant Education Services	--	--	--	--
Students with Disabilities	119	117	20	17.1

Note: To protect student privacy, double dashes (--) are used in the table when the cell size within a selected student population is ten or fewer.

C. Engagement

State Priority: School Climate

The SARC provides the following information relevant to the State priority: School Climate (Priority 6):

- Pupil suspension rates;
- Pupil expulsion rates; and
- Other local measures on the sense of safety

Suspensions and Expulsions

This table displays suspensions data.

Suspensions								
School 2021-22	School 2022-23	School 2023-24	District 2021-22	District 2022-23	District 2023-24	State 2021-22	State 2022-23	State 2023-24
0	0	0.21	2.51	2.7	2.64	3.17	3.6	3.28

This table displays expulsions data.

Expulsions								
School 2021-22	School 2022-23	School 2023-24	District 2021-22	District 2022-23	District 2023-24	State 2021-22	State 2022-23	State 2023-24
0	0	0	0.05	0.05	0.03	0.07	0.08	0.07

2023-24 Suspensions and Expulsions by Student Group

Student Group	Suspensions Rate	Expulsions Rate
All Students	0.21	0.00
Female	0.00	0.00
Male	0.40	0.00
Non-Binary	0.00	0.00
American Indian or Alaska Native	0.00	0.00
Asian	0.00	0.00
Black or African American	0.00	0.00
Filipino	0.00	0.00
Hispanic or Latino	0.79	0.00
Native Hawaiian or Pacific Islander	0.00	0.00
Two or More Races	0.00	0.00
White	0.00	0.00
English Learners	5.00	0.00
Foster Youth	0.00	0.00
Homeless	0.00	0.00
Socioeconomically Disadvantaged	0.00	0.00
Students Receiving Migrant Education Services	0.00	0.00
Students with Disabilities	0.84	0.00

Note: To protect student privacy, double dashes (--) are used in the table when the cell size within a selected student population is ten or fewer.

2024-25 School Safety Plan

The safety plan at Innovations Academy is drafted annually by school administration in accordance with district and county education recommendations and contains an evacuation plan, lock down, fire and earthquake drills. The drills take place monthly and are reviewed regularly with staff. A comprehensive school safety plan is located in the front office for parent

2024-25 School Safety Plan

review. The safety plan was last reviewed and approved on October 17, 2024.

Adult supervision is provided in the classrooms and outside areas before and after school, and during lunch and recess. Under the supervision of the director, school staff members implement specific school-building security procedures. All students are supervised by staff members or volunteers with background checks.

D. Other SARC Information Information Required in the SARC

The information in this section is required to be in the SARC but is not included in the state priorities for LCFF.

2021-22 Elementary Average Class Size and Class Size Distribution

This table displays the 2021-22 average class size and class size distribution. The columns titled “Number of Classes” indicates how many classes fall into each size category (a range of total students per class). The “Other” category is for multi-grade level classes.

Grade Level	Average Class Size	Number of Classes with 1-20 Students	Number of Classes with 21-32 Students	Number of Classes with 33+ Students
K	8	5		
1	8	2	1	
2	19	1	2	
3	20	1	2	
4	16	1	2	
5	17	1	2	
6	19	1	2	
Other	12	2	1	

2022-23 Elementary Average Class Size and Class Size Distribution

This table displays the 2022-23 average class size and class size distribution. The columns titled “Number of Classes” indicates how many classes fall into each size category (a range of total students per class). The “Other” category is for multi-grade level classes.

Grade Level	Average Class Size	Number of Classes with 1-20 Students	Number of Classes with 21-32 Students	Number of Classes with 33+ Students
K	9	5		
1	11	3	2	
2	11	3	2	
3	19	1	2	
4	19	1	2	
5	15	1	2	
6	17	1	2	

2023-24 Elementary Average Class Size and Class Size Distribution

This table displays the 2023-24 average class size and class size distribution. The columns titled “Number of Classes” indicates how many classes fall into each size category (a range of total students per class). The “Other” category is for multi-grade level classes.

Grade Level	Average Class Size	Number of Classes with 1-20 Students	Number of Classes with 21-32 Students	Number of Classes with 33+ Students
K	13	15		
1	17	8	1	
2	17	3	8	
3	18	8	1	
4	22	1	8	
5	19	2	6	
6	14	3		

2023-24 Ratio of Pupils to Academic Counselor

This table displays the ratio of pupils to Academic Counselor. One Full Time Equivalent (FTE) equals one staff member working full time; one FTE could also represent two staff members who each work 50 percent of full time.

Title	Ratio
Pupils to Academic Counselor	0

2023-24 Student Support Services Staff

This table displays the number of FTE support staff assigned to this school. One Full Time Equivalent (FTE) equals one staff member working full time; one FTE could also represent two staff members who each work 50 percent of full time. The “Other” category is for all other student support services staff positions not listed.

Title	Number of FTE Assigned to School
Counselor (Academic, Social/Behavioral or Career Development)	1
Library Media Teacher (Librarian)	0
Library Media Services Staff (Paraprofessional)	0
Psychologist	1
Social Worker	0
Nurse	0
Speech/Language/Hearing Specialist	1
Resource Specialist (non-teaching)	5
Other	0

Fiscal Year 2022-23 Expenditures Per Pupil and School Site Teacher Salaries

This table displays the 2022-23 expenditures per pupil and average teacher salary for this school. Cells with N/A values do not require data.

Level	Total Expenditures Per Pupil	Expenditures Per Pupil (Restricted)	Expenditures Per Pupil (Unrestricted)	Average Teacher Salary
School Site	9,194.27	1,749.22	7,445.05	53,509.79
District	N/A	N/A	\$5671.0	\$99,546
Percent Difference - School Site and District	N/A	N/A	27.1	-60.2
State	N/A	N/A	\$10,771	\$94,625
Percent Difference - School Site and State	N/A	N/A	-36.5	-55.5

Fiscal Year 2023-24 Types of Services Funded

Innovations Academy provides a variety of resources to our students. Much of the learning software used at school is also made available to students at home, though the school does not assign homework. Innovations Academy has a strong social emotional program with tools integrated from Positive Discipline, Responsive Classroom, Nonviolent Communication, and Restorative practices. All students learn conflict resolution and communication tools through this solution focused curriculum and discipline plan. Our staff includes a full time Marriage & Family Therapist Associate to assist students and families. Our grade levels have teacher assistants (in addition to the regular credentialed teacher).

We intentionally do not assign homework. The purpose of this is to assist students in experiencing more meaningful time with their families, provide needed free play time for children to grow, learn and ultimately thrive as humans with time hopefully spent outdoors as well as allow children to participate in activities and classes outside of school without the stress of returning to more work when they should be sleeping, laughing and learning with their families. We expect parents to read with and to their children at home and explore the outdoors as well as engage in family conversations.

IA supports students by providing access to learning that takes into account a variety of student interests. Our students participate in projects and inquiries that integrate subjects in meaningful explorations. They speak regularly with guest experts who utilize the subjects they are studying. They engage in service learning, often working with non-profit organizations as part of their studies. We also currently offer the following enrichment classes: 2-D art, 3-D art, nature studies, engineering, performing arts and foreign language.

Special Education students are served by a strong team of experts that includes: a Speech Language Pathologist (+ a SLPA), an Occupational Therapist (+ an OT aide), a School Psychologist, an Adaptive PE teacher, a Marriage & Family Therapist and Education Specialists.

Fiscal Year 2022-23 Teacher and Administrative Salaries

This table displays the 2022-23 Teacher and Administrative salaries. For detailed information on salaries, see the CDE Certification Salaries & Benefits web page at <http://www.cde.ca.gov/ds/fd/cs/>.

Category	District Amount	State Average for Districts in Same Category
Beginning Teacher Salary	\$55,818	\$56,573
Mid-Range Teacher Salary	\$84,816	\$87,186
Highest Teacher Salary	\$118,143	\$119,665
Average Principal Salary (Elementary)	\$159,994	\$148,486
Average Principal Salary (Middle)	\$165,280	\$154,835
Average Principal Salary (High)	\$180,299	\$170,008
Superintendent Salary	\$412,500	\$338,699
Percent of Budget for Teacher Salaries	33.49	31.41
Percent of Budget for Administrative Salaries	4.97	4.86

Professional Development

At Innovations Academy, we consider professional development as ongoing throughout the year via weekly staff meetings, grade level team collaborations, professional development work days, and educational workshops. These sessions focus on constructivism, inquiry, project development, academic content, assessment, differentiation of instruction to meet the needs of all students, classroom management and our social emotional curriculum.

An administrator observes teachers throughout the week, providing the necessary feedback teachers need to both feel supported and to experience growth and reflection in their craft. Teachers are provided time to observe each other and collaborate regularly during the school day. Our professional development focus areas include math, ELA, test-taking success strategies, and interactive learning.

This table displays the number of school days dedicated to staff development and continuous improvement.

Subject	2022-23	2023-24	2024-25
Number of school days dedicated to Staff Development and Continuous Improvement	38	39	42