



## MEETING AGENDA - iLEAD California Charters 1 Board

Any public records relating to an agenda item for an open session of the Board which are distributed to all, or a majority of all of the Board members shall be available for public inspection at the resource center between 9:00 am and 3:30 pm.

### Meeting

<b>Meeting Date</b>	Wednesday, June 29, 2022
<b>Start Time</b>	6:00 PM
<b>End Time</b>	7:30 PM
<b>Location</b>	This meeting will be held virtually. You may join us on ZOOM at: Zoom Meeting: <a href="https://zoom.us/j/5395735793">https://zoom.us/j/5395735793</a> Meeting ID: 539 573 5793 Dial in Number: 1-669-900-6833
<b>Purpose</b>	Regular Scheduled Meeting

### Agenda

#### 1. Opening Items

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1.1. Call The Meeting To Order

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1.2. Roll Call

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1.3. Pledge Of Allegiance

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1.4. Approve Agenda

**Due date:** 6/29/2022

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1.5. Approve Minutes

**Due date:** 6/29/2022

#### Documents

- Minutes-2022-06-22.pdf
- 

#### 2. Closed Session

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2.1. CONFERENCE WITH LEGAL COUNSEL--EXISTING LITIGATION

Government Code Section 54956.9(d)(1)

Name of case: Student v. iLEAD Exploration Charter (OAH Case No. 2022040494)

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2.2. CONFERENCE WITH LEGAL COUNSEL—ANTICIPATED LITIGATION

Gov. Code section 54956.9(d)(2): 3 Matters

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## 2.3. PUBLIC EMPLOYEE DISCIPLINE/DISMISSAL/RELEASE

Gov. Code section 54957(b)

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## 3. Report Of Closed Session

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## 4. Public Comments

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### 4.1. Public Comments

The public may address the iLEAD CA Charters 1 governing board regarding any item within the Board's jurisdiction whether or not that item appears on the agenda during this time. If you wish to address the Board, please complete a public comment card. Comments for the public will be limited to 3 minutes.

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## 5. Discussion And Reports

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### 5.1. 2020 - 2021 Audit Report & Form 990 Income Tax Return

Review and discussion of the 2020-2021 audit report and Form 900 Income Tax Return as presented.

#### Documents

- iLead California Charters 1 - Form 990 - 2020 Client Copy.pdf
- 

## 6. Action Items

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### 6.1. 2021 - 2022 Annual Independent Auditor Agreement

Discuss and take action regarding the annual independent auditor agreement for the 2021-2022 school year.

**Due date:** 6/29/2022

#### Documents

- iLEAD California Charters 1 - 22 CLA Audit Engagement Letter.pdf
- 

### 6.2. Educational Protection Account Resolution

Discuss and take action regarding annual Educational Protection Account Resolution as required by CDE.

**Due date:** 6/29/2022

#### Documents

- FY22.23 Hybrid EPA Board Resolution.pdf
- 

### 6.3. LCAP

Discuss and take action regarding the 2022 - 2025 LCAP.

**Due date:** 6/29/2022

#### Documents

- 21-24 iLEAD Hybrid DRAFT LCAP.pdf
- 

### 6.4. 21-22 Estimated Actuals and Multyyear School Budget

Discuss and take action regarding the 2021-2022 Estimated Actuals and school budget.



**Due date:** 6/29/2022

Documents

- iLEAD Hybrid Preliminary Budget Narrative FY22\_23.pdf
  - 2022-23 iLEAD Hybrid Preliminary Budget Alternative Form and MYP.pdf
- 

### 6.5. iCA Special Education Shared Service Agreement

Discuss and take action regarding the revised iLEAD Special Education Service Agreement.

**Due date:** 6/29/2022

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### 6.6. Revised Employee Guidebook

Discuss and take action regarding the revised Employee Guidebook with required changes to reflect current practices, procedures, and/or laws.

**Due date:** 6/29/2022

Documents

- iLEAD CA \_ Employee Guidebook 22-23 Red Line.pdf
- 

### 6.7. iCA Holiday Policy

Discuss and take action regarding the 2022-2023 Holiday Policy.

**Due date:** 6/29/2022

Documents

- iCA Holiday Policy 22-23.pdf
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### 6.8. Revised Cell Phone Policy

Discuss and take action regarding the revised Cell Phone policy.

**Due date:** 6/29/2022

Documents

- Revised - Cell Phone Policy- iLEAD Hybrid.pdf
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### 6.9. LEE ACTON Lease Extension

Discuss and take action regarding the iCA/iLEAD Hybrid Lease extension for Suite A, B, and C in Acton.

**Due date:** 6/29/2022

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### 6.10. 2022 - 2023 Board Meeting Dates

Discuss and take action regarding the 2022 - 2023 Board Meeting Dates.

**Due date:** 6/29/2022

Documents

- Draft- iLEAD CA 2022-2023 Board Meeting Calendar.pdf
- 

### 6.11. 2022-2023 Insurance Policies

Discuss and take action regarding the 2022-2023 insurance policies.

**Due date:** 6/29/2022



## Documents

- iCA Board Resolution - Insurance Policy 2022-2023.pdf

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### 6.12. Approval of CEO Contract

Discuss and take action regarding the CEO Contract.

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## 7. Comments

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### 7.1. Board Comments

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## 8. Closing Items

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### 8.1. Next Meeting Date

Pending Action Above

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### 8.2. Adjournment

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**Please note:** items on the agenda may not be addressed in the order they appear. The Board of Directors may alter the order at their discretion.

- **Board Room Accessibility:** The Board of Directors encourage those with disabilities to participate fully in the public meeting process. If you need a disability-related modification or accommodation, including auxiliary aids or services to participate in the public meeting, please contact the office at least 48 hours before the scheduled Board of Directors meeting so that we may make every reasonable effort to accommodate you. [Government Code § 54954.2; Americans with Disabilities Act of 1990, § 202 (42 U.S.C. § 12132).]

*The Secretary of the Board of Directors, hereby certifies that this agenda was publicly posted 72 or 24 hours prior to the meeting as required by law.*



## MEETING MINUTES - iLEAD California Charters 1 Board

### Meeting

<b>Date</b>	Wednesday, June 22, 2022
<b>Started</b>	6:00 PM
<b>Ended</b>	8:00 PM
<b>Location</b>	This meeting will be held virtually. You may join us on ZOOM at: Zoom Meeting: <a href="https://zoom.us/j/5395735793">https://zoom.us/j/5395735793</a> Meeting ID: 539 573 5793 Dial in Number: 1-669-900-6833
<b>Purpose</b>	Regular Scheduled Meeting
<b>Chaired by</b>	Cheri Bradford
<b>Recorder</b>	Julie Basse

### Minutes

#### 1. Opening Items

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##### 1.1. Call The Meeting To Order

Meeting was called to order at 6:00 p.m.

**Status:** Completed

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##### 1.2. Roll Call

Cheri Bradford - Present

Kenchy Ragsdale - Present

Kenneth Scott - Present

**Status:** Completed

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##### 1.3. Pledge Of Allegiance

The Pledge of Allegiance was recited

**Status:** Completed

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##### 1.4. Approve Agenda

Motion: Kenchy Ragsdale

Seconded: Kenneth Scott

Motion passed unanimously

**Due date:**

**Status:** Completed

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##### 1.5. Approve Minutes



Motion: Kenneth Scott

Seconded: Kenchy Ragsdale

Motion passed unanimously

**Due date:**

**Status:** Completed

Documents

- Minutes-2022-06-03-v3 (1).pdf
- 

## 2. Closed Session

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### 2.1. PUBLIC EMPLOYEE APPOINTMENT

Gov. Code section 54957(b): Interim CEO

**Status:** Completed

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### 2.2. CONFERENCE WITH LEGAL COUNSEL—ANTICIPATED LITIGATION

(Gov. Code section 54956.9(d)(2): 3 Matters

**Status:** Completed

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### 2.3. PUBLIC EMPLOYEE DISCIPLINE/DISMISSAL/RELEASE

Gov. Code section 54957(b)

**Status:** Completed

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## 3. Report Of Closed Session

Nothing reported from Closed Session - No Vote Taken

**Due date:**

**Status:** Completed

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## 4. Discussion And Reports

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### 4.1. LCAP Public Hearing

Allow public input regarding the Local Control Accountability Plan and Budget.

Lara Durrell presented the Local Control Accountability Plan and Budget. There were no questions or public comments.

**Status:** Completed

Documents

- iLEAD Hybrid DRAFT LCAP.pdf
  - Hybrid FY22.23 Preliminary Budget for Board Review.pdf
- 

## 5. Public Comments

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### 5.1. Public Comments

The public may address the iLEAD CA Charters 1 governing board regarding any item within the Board's jurisdiction whether or not that item appears on the agenda during this time. If you wish to address the Board, please complete a public comment card. Comments for the public will be limited to 3 minutes.

No public comment(s) made

**Status:** Completed

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## 6. Consent Items

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### 6.1. Personnel Report

Motion: Kenchy Ragsdale

Seconded: Kenneth Scott

Motion passed unanimously

**Due date:**

**Status:** Completed

Documents

- Personnel Report Expl-AV 6.14.22.pdf
  - Personnel Report\_iLEAD CA 6.14.22.pdf
- 

### 6.2. Check Register

Motion: Kenchy Ragsdale

Seconded: Kenneth Scott

Motion passed unanimously

**Due date:**

**Status:** Completed

Documents

- iCC1 Payment Register\_20220615.pdf
- 

### 6.3. AB 361 Emergency Legislation Regarding Brown Act Meeting Requirements

Motion: Kenchy Ragsdale

Seconded: Kenneth Scott

Motion passed unanimously

**Due date:**

**Status:** Completed

Documents

- iLEAD CA - AB 361 Emergency Legislation Regarding Brown Act Meeting Requirements (1).pdf
- 

## 7. Action Items

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### 7.1. Approval of Contract for Temporary Interim CEO

Discuss and take action regarding a contract for Temporary Interim CEO.

1. The Board proposes contracting with Caprice Young to serve as Temporary Interim CEO of iLEAD California on a half-time basis which shall generally be twenty hours per week beginning, but should not exceed thirty hours per week without written permission from the Board, effective June 24, 2022 at a rate of \$250.00 per hour.
2. The Board designates Kenneth Scott to work with counsel to finalize and execute the agreement.

Motion: Kenchy Ragsdale

Seconded: Kenneth Scott

Motion passed unanimously

**Due date:**

**Status:** Completed

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### 7.2. Transitional Kindergarten Implementation Plan

Discuss and take action regarding the required plan for Transitional Kindergarten as required by the State of CA.

Cassandra Coleman presented the Transitional Kindergarten Implementation Plan and answered questions of the Board.

Motion: Kenneth Scott

Seconded: Kenchy Ragsdale

Motion passed unanimously

**Due date:**

**Status:** Completed

Documents

- Board Copy of iLEAD Hybrid Universal TK Plan.docx.pdf
- 

### 7.3. Admissions and Enrollment Policy

Discuss and take action regarding Admissions and Enrollment Policy.

Cassandra Coleman presented the Admissions and Enrollment Policy and answered questions of the Board.

Motion: Kenchy Ragsdale

Seconded: Cheri Bradford

Motion passed unanimously

**Due date:**

**Status:** Completed

Documents

- iLEAD Hybrid Admissions and Enrollment Policy.pdf
- 

### 7.4. 2022 - 2023 Family Guidebooks

Discuss and take action regarding the 2022 - 2023 Family Guidebooks with required changes to reflect current practices, procedures, and/or laws.





Cassandra Coleman presented the 2022 - 2023 Family Guidebooks and answered questions of the Board.

Motion: Kenchy Ragsdale

Seconded: Cheri Bradford

Motion passed unanimously

**Due date:**

**Status:** Completed

#### Documents

- \_iLEAD Hybrid Exploration 2022-2023 Learner\_Family Guidebook.pdf
- AVExp 2022-2023 iLEAD Schools Family Guidebook.pdf
- 2022-2023 AV Studio iLEAD Schools Family Guidebook .pdf

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### 7.5. Revised iLEAD CA Service Agreement

Discuss and take action regarding the revised iLEAD CA Service Agreement.

Amanda Fischer and Kim Lytle presented the Revised iLEAD CA Service Agreement and answered questions of the Board.

Motion: Kenchy Ragsdale

Seconded: Kenneth Scott

Motion passed unanimously

**Due date:**

**Status:** Completed

#### Documents

- Revised iCA Service Agreement 22-23.pdf
- 2022-2023 iCA Strategic Goals and Accomplishments 21-22.pptx.pdf

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### 7.6. LACOE Certification of Signatures

Discuss and take action to revise signatories filed with LACOE.

Kim Lytle presented the LACOE Certification of Signatures and answered questions of the Board.

Motion: Kenchy Ragsdale

Seconded: Kenneth Scott

Motion passed unanimously

**Due date:**

**Status:** Completed

#### Documents

- Revised iCA 503-804 Certification of Signatures - LACOE.pdf

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### 7.7. 2022 - 2023 Contracts

Discuss and take action regarding contracts over \$10,000 for next school year. These are outlined in the projected budget.

Julie Basse presented the 2022 - 2023 Contracts and Amanda Fischer answered questions of the Board.



Motion: Kenneth Scott

Seconded: Kenchy Ragsdale

Motion passed unanimously

**Due date:**

**Status:** Completed

Documents

- Simoneau CC contract iLEAD year 2.doc.pdf
- The Lawrence M. Daley Camp and Conference - Staff Retreat.pdf
- SOAR iLead Schools Teachers Contract October 2022.doc.pdf

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## 8. Comments

### 8.1. Board Comments

Cheri Bradford appreciates the email from the staff but asks that they be sent at least one day prior to the board meeting so there's time to read them. She thanked her fellow board members along with Kim Lytle, Amanda Fischer and Julie Basse for supporting the Board.

Kenchy Ragsdale is confident in the Temporary Interim CEO, as he has known her for a long time

**Status:** Completed

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## 9. Closing Items

### 9.1. Next Meeting Date - June 29, 2022 at 6:00 p.m.

**Status:** Completed

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### 9.2. Adjournment

The meeting was adjourned at 8:00 p.m.

**Status:** Completed

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CliftonLarsonAllen LLP  
CLAconnect.com

**ILEAD CALIFORNIA CHARTERS 1**  
**FORM 990 INCOME TAX RETURN**  
**FOR YEAR ENDED JUNE 30, 2021**



CliftonLarsonAllen LLP  
CLAconnect.com

iLead California Charters 1  
3720 Sierra Hwy Ste A  
Acton, CA 93510  
Attention: John Vescovo

Dear John,

Enclosed is the organization's 2020 Exempt Organization return.

Specific filing instructions are as follows.

### **FORM 990 RETURN:**

This return has qualified for electronic filing. After you have reviewed the return for completeness and accuracy, please sign, date and return Form 8879-EO to our office. We will transmit the return electronically to the IRS and no further action is required. Please return Form 8879-EO to us as soon as possible, but no later than by May 16, 2022 the filing deadline.

In addition, tax-exempt organizations must make available for public inspection a copy of their annual returns for the preceding three years and exemption application, if applicable. An organization generally must furnish filings to anyone who requests them in person or in writing. An exempt organization may meet this requirement by posting all the documents on its website or at another organizations site as part of a database of similar materials. Specific requirements must be met to meet this exception.

### **CALIFORNIA FORM 199 RETURN:**

The California Form 199 return has qualified for electronic filing. After you have reviewed your return for completeness and accuracy, please sign, date and return Form 8453-EO to our office. We will then transmit your return to the FTB. Do not mail the paper copy of the return to the FTB.

No payment is required.

### **A few final reminders relating to your tax return filings:**

- There are substantial penalties for failure to properly disclose and report foreign financial accounts and foreign activity. Please make sure you have informed us of any foreign financial accounts or foreign activity so that we have the necessary information to complete any required disclosures or filings.
- Be sure to review the returns prior to signing as you have final responsibility for all information included in the returns. Please contact us if you have any questions or concerns.
- We recommend you keep a paper or electronic copy of your tax returns permanently. Supporting documentation should be kept for a minimum of seven years based on IRS guidance.

CLA exists to create opportunities – for our clients, our people, and our communities. We value our relationship with you and thank you for your trust and confidence in allowing us to serve you. If we can assist you in making strategic, informed decisions in areas of tax or beyond, please contact us as questions arise throughout the year.

Sincerely,

CliftonLarsonAllen LLP

Form **8879-EO****IRS e-file Signature Authorization  
for an Exempt Organization**

OMB No. 1545-0047

For calendar year 2020, or fiscal year beginning JUL 1, 2020, and ending JUN 30, 2021**2020**Department of the Treasury  
Internal Revenue Service▶ **Do not send to the IRS. Keep for your records.**  
▶ **Go to [www.irs.gov/Form8879EO](http://www.irs.gov/Form8879EO) for the latest information.**

Name of exempt organization or person subject to tax

Taxpayer identification number

**ILEAD CALIFORNIA CHARTERS 1****47-4286845**

Name and title of officer or person subject to tax

**DR PATRICK HILL  
PRESIDENT****Part I Type of Return and Return Information** (Whole Dollars Only)

Check the box for the return for which you are using this Form 8879-EO and enter the applicable amount, if any, from the return. If you check the box on line **1a, 2a, 3a, 4a, 5a, 6a, or 7a** below, and the amount on that line for the return being filed with this form was blank, then leave line **1b, 2b, 3b, 4b, 5b, 6b, or 7b**, whichever is applicable, blank (do not enter -0-). But, if you entered -0- on the return, then enter -0- on the applicable line below. **Do not** complete more than one line in Part I.

<b>1a</b> Form 990 check here ▶ <input checked="" type="checkbox"/>	<b>b</b> Total revenue, if any (Form 990, Part VIII, column (A), line 12) .....	<b>1b</b> <u>46,593,851.</u>
<b>2a</b> Form 990-EZ check here ▶ <input type="checkbox"/>	<b>b</b> Total revenue, if any (Form 990-EZ, line 9) .....	<b>2b</b> _____
<b>3a</b> Form 1120-POL check here ▶ <input type="checkbox"/>	<b>b</b> Total tax (Form 1120-POL, line 22) .....	<b>3b</b> _____
<b>4a</b> Form 990-PF check here ▶ <input type="checkbox"/>	<b>b</b> Tax based on investment income (Form 990-PF, Part VI, line 5) .....	<b>4b</b> _____
<b>5a</b> Form 8868 check here ▶ <input type="checkbox"/>	<b>b</b> Balance due (Form 8868, line 3c) .....	<b>5b</b> _____
<b>6a</b> Form 990-T check here ▶ <input type="checkbox"/>	<b>b</b> Total tax (Form 990-T, Part III, line 4) .....	<b>6b</b> _____
<b>7a</b> Form 4720 check here ▶ <input type="checkbox"/>	<b>b</b> Total tax (Form 4720, Part III, line 1) .....	<b>7b</b> _____

**Part II Declaration and Signature Authorization of Officer or Person Subject to Tax**

Under penalties of perjury, I declare that ☒ I am an officer of the above organization or ☐ I am a person subject to tax with respect to (name of organization) \_\_\_\_\_, (EIN) \_\_\_\_\_ and that I have examined a copy

of the 2020 electronic return and accompanying schedules and statements, and, to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amount in Part I above is the amount shown on the copy of the electronic return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send the return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of the federal taxes owed on this return, and the financial institution to debit the entry to this account. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I have selected a personal identification number (PIN) as my signature for the electronic return and, if applicable, the consent to electronic funds withdrawal.

**PIN: check one box only**

☒ I authorize **CLIFTONLARSONALLEN LLP** to enter my PIN **11700**  
ERO firm name Enter five numbers, but do not enter all zeros

as my signature on the tax year 2020 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I also authorize the aforementioned ERO to enter my PIN on the return's disclosure consent screen.

☐ As an officer or person subject to tax with respect to the organization, I will enter my PIN as my signature on the tax year 2020 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I will enter my PIN on the return's disclosure consent screen.

Signature of officer or person subject to tax ▶

Date ▶

**Part III Certification and Authentication**

**ERO's EFIN/PIN.** Enter your six-digit electronic filing identification number (EFIN) followed by your five-digit self-selected PIN.

**95405255902**

Do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature on the 2020 electronically filed return indicated above. I confirm that I am submitting this return in accordance with the requirements of **Pub. 4163**, Modernized e-File (MeF) Information for Authorized IRS e-file Providers for Business Returns.

ERO's signature ▶ **WADE MCMULLEN**Date ▶ **05/11/22**

**ERO Must Retain This Form - See Instructions**  
**Do Not Submit This Form to the IRS Unless Requested To Do So**

LHA For Paperwork Reduction Act Notice, see instructions.

Form **8879-EO** (2020)

# Return of Organization Exempt From Income Tax

**Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)**

▶ Do not enter social security numbers on this form as it may be made public.

► Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

2020

**Open to Public Inspection**

**A** For the 2020 calendar year, or tax year beginning **JUL 1, 2020** and ending **JUN 30, 2021**

<b>B</b> Check if applicable:  <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>C</b> Name of organization		<b>D</b> Employer identification number	
	ILEAD CALIFORNIA CHARTERS 1		47-4286845	
	Doing business as		<b>E</b> Telephone number 800-925-1502	
	Number and street (or P.O. box if mail is not delivered to street address)	Room/suite		
	3720 SIERRA HWY STE A			
City or town, state or province, country, and ZIP or foreign postal code		<b>G</b> Gross receipts \$ 46,593,851.		
<b>F</b> Name and address of principal officer: DR. PATRICK HILL 3720 SIERRA HWY SUITE A, ACTON, CA 93510		<b>H(a)</b> Is this a group return for subordinates? ..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>H(b)</b> Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. See instructions		
<b>I</b> Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c)( ) ◀ (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527		<b>H(c)</b> Group exemption number ▶		
<b>J</b> Website: ▶ WWW.ILEADSCHOOLS.ORG		<b>K</b> Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶		
		<b>L</b> Year of formation: 2015 <b>M</b> State of legal domicile: CA		

<b>Part I</b>	<b>Summary</b>
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Activities & Governance		Revenue		Expenses		Net Assets or Fund Balances	
1 Briefly describe the organization's mission or most significant activities: <b>A CALIFORNIA CHARTER SCHOOL</b>							
<b>SERVING STUDENTS IN K-12TH GRADE.</b>							
2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.							
3 Number of voting members of the governing body (Part VI, line 1a)		3	5				
4 Number of independent voting members of the governing body (Part VI, line 1b)		4	5				
5 Total number of individuals employed in calendar year 2020 (Part V, line 2a)		5	432				
6 Total number of volunteers (estimate if necessary)		6	5				
7a Total unrelated business revenue from Part VIII, column (C), line 12		7a	0.				
b Net unrelated business taxable income from Form 990-T, Part I, line 11		7b	0.				
		<b>Prior Year</b>		<b>Current Year</b>			
8 Contributions and grants (Part VIII, line 1h)		34,762,972.		36,303,755.			
9 Program service revenue (Part VIII, line 2g)		0.		10,134,718.			
10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)		0.		0.			
11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)		59,341.		155,378.			
12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)		34,822,313.		46,593,851.			
13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)		0.		0.			
14 Benefits paid to or for members (Part IX, column (A), line 4)		0.		0.			
15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)		18,690,210.		23,441,046.			
16a Professional fundraising fees (Part IX, column (A), line 11e)		0.		0.			
b Total fundraising expenses (Part IX, column (D), line 25)		0.					
17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)		16,085,183.		19,457,338.			
18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)		34,775,393.		42,898,384.			
19 Revenue less expenses. Subtract line 18 from line 12		46,920.		3,695,467.			
		<b>Beginning of Current Year</b>		<b>End of Year</b>			
20 Total assets (Part X, line 16)		5,751,028.		20,389,401.			
21 Total liabilities (Part X, line 26)		3,992,479.		14,935,385.			
22 Net assets or fund balances. Subtract line 21 from line 20		1,758,549.		5,454,016.			

## Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here	Signature of officer			Date		
	<b>DR. PATRICK HILL, PRESIDENT</b> Type or print name and title					
Paid Preparer Use Only	Print/Type preparer's name		Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	<b>WADE MCMULLEN</b>		<b>WADE MCMULLEN</b>	<b>05/11/22</b>		<b>P00541671</b>
	Firm's name <b>CLIFTONLARSONALLEN LLP</b>				Firm's EIN <b>41-0746749</b>	
	Firm's address <b>2210 EAST ROUTE 66 GLENORA, CA 91740</b>				Phone no. (626) 857-7300	

May the IRS discuss this return with the preparer shown above? See instructions ☒ Yes ☐ No

**Part III Statement of Program Service Accomplishments**Check if Schedule O contains a response or note to any line in this Part III ☐**1** Briefly describe the organization's mission:

**THE SCHOOL IS A NOT-FOR-PROFIT BENEFIT CORPORATION UNDER THE LAWS OF THE STATE OF CALIFORNIA FOR THE PURPOSE OF MANAGING AND OPERATING PUBLIC CHARTER SCHOOLS.**

**2** Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No

If "Yes," describe these new services on Schedule O.

**3** Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No

If "Yes," describe these changes on Schedule O.

**4** Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses.

Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

**4a** (Code: ) (Expenses \$ **33,958,691.** including grants of \$ ) (Revenue \$ **10,290,096.** )

**ILEAD CALIFORNIA CHARTER SCHOOL SERVES STUDENTS IN KINDERGARTEN THROUGH 12TH GRADE. ILEAD STRIVES TO TEACH LIFE-LONG VALUES AND ENCOURAGE LEADERSHIP NOT JUST AS A PART OF A CAREER TRACK BUT BY INSTILLING IN EACH LEARNER THE CONFIDENCE AND CHARACTER THAT INSPIRE OTHERS. THOUGH INNOVATIVE TEACHINGS AND PROJECT-BASED LEARNINGS, ILEAD'S MISSION IS TO INSPIRE STUDENTS TO THINK AND LEAD. DURING THE FISCAL YEAR END JUNE 30, 2021, CALIFORNIA CHARTER SERVED APPROXIMATELY 3,660 STUDENTS IN K THROUGH 12TH GRADE.**

**4b** (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )**4c** (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )**4d** Other program services (Describe on Schedule O.)

(Expenses \$ including grants of \$ ) (Revenue \$ )

**4e** Total program service expenses **33,958,691.**



**Part IV Checklist of Required Schedules**

	Yes	No
<b>1</b> Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i>	<b>1</b> X	
<b>2</b> Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> ?	<b>2</b>	X
<b>3</b> Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i>	<b>3</b>	X
<b>4</b> <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i>	<b>4</b>	X
<b>5</b> Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? <i>If "Yes," complete Schedule C, Part III</i>	<b>5</b>	X
<b>6</b> Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i>	<b>6</b>	X
<b>7</b> Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i>	<b>7</b>	X
<b>8</b> Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>	<b>8</b>	X
<b>9</b> Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i>	<b>9</b>	X
<b>10</b> Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi endowments? <i>If "Yes," complete Schedule D, Part V</i>	<b>10</b>	X
<b>11</b> If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
<b>a</b> Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i>	<b>11a</b>	X
<b>b</b> Did the organization report an amount for investments - other securities in Part X, line 12, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII</i>	<b>11b</b>	X
<b>c</b> Did the organization report an amount for investments - program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i>	<b>11c</b>	X
<b>d</b> Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX</i>	<b>11d</b>	X
<b>e</b> Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i>	<b>11e</b>	X
<b>f</b> Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X</i>	<b>11f</b>	X
<b>12a</b> Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i>	<b>12a</b>	X
<b>b</b> Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i>	<b>12b</b>	X
<b>13</b> Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>	<b>13</b> X	
<b>14a</b> Did the organization maintain an office, employees, or agents outside of the United States?	<b>14a</b>	X
<b>b</b> Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV</i>	<b>14b</b>	X
<b>15</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If "Yes," complete Schedule F, Parts II and IV</i>	<b>15</b>	X
<b>16</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If "Yes," complete Schedule F, Parts III and IV</i>	<b>16</b>	X
<b>17</b> Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I</i>	<b>17</b>	X
<b>18</b> Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>	<b>18</b>	X
<b>19</b> Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>	<b>19</b>	X
<b>20a</b> Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i>	<b>20a</b>	X
<b>b</b> If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	<b>20b</b>	
<b>21</b> Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>	<b>21</b>	X

**Part IV Checklist of Required Schedules** (continued)

	Yes	No
<b>22</b> Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i> .....	<b>22</b>	X
<b>23</b> Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i> .....	<b>23</b>	X
<b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i> .....	<b>24a</b>	X
<b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? .....	<b>24b</b>	
<b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? .....	<b>24c</b>	
<b>d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? .....	<b>24d</b>	
<b>25a</b> <b>Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i> .....	<b>25a</b>	X
<b>b</b> Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i> .....	<b>25b</b>	X
<b>26</b> Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part II</i> .....	<b>26</b>	X
<b>27</b> Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III</i> .....	<b>27</b>	X
<b>28</b> Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions, for applicable filing thresholds, conditions, and exceptions):		
<b>a</b> A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? <i>If "Yes," complete Schedule L, Part IV</i> .....	<b>28a</b>	X
<b>b</b> A family member of any individual described in line 28a? <i>If "Yes," complete Schedule L, Part IV</i> .....	<b>28b</b>	X
<b>c</b> A 35% controlled entity of one or more individuals and/or organizations described in lines 28a or 28b? <i>If "Yes," complete Schedule L, Part IV</i> .....	<b>28c</b>	X
<b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i> .....	<b>29</b>	X
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i> .....	<b>30</b>	X
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i> .....	<b>31</b>	X
<b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i> .....	<b>32</b>	X
<b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i> .....	<b>33</b>	X
<b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i> .....	<b>34</b>	X
<b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)? .....	<b>35a</b>	X
<b>b</b> If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i> .....	<b>35b</b>	
<b>36</b> <b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i> .....	<b>36</b>	X
<b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i> .....	<b>37</b>	X
<b>38</b> Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? .....	<b>38</b>	X

Note: All Form 990 filers are required to complete Schedule O

**Part V Statements Regarding Other IRS Filings and Tax Compliance**Check if Schedule O contains a response or note to any line in this Part V ☐

	Yes	No
<b>1a</b> Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable .....	<b>1a</b>	496
<b>b</b> Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable .....	<b>1b</b>	0
<b>c</b> Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? .....	<b>1c</b>	X

**Part V** Statements Regarding Other IRS Filings and Tax Compliance (continued)

	Yes	No
<b>2a</b> Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return		
<b>2a</b> 432		
<b>b</b> If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	<b>2b</b> X	
<b>Note:</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)		
<b>3a</b> Did the organization have unrelated business gross income of \$1,000 or more during the year?	<b>3a</b>	X
<b>b</b> If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O	<b>3b</b>	
<b>4a</b> At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	<b>4a</b>	X
<b>b</b> If "Yes," enter the name of the foreign country		
See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
<b>5a</b> Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	<b>5a</b>	X
<b>b</b> Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	<b>5b</b>	X
<b>c</b> If "Yes" to line 5a or 5b, did the organization file Form 8886-T?	<b>5c</b>	
<b>6a</b> Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?	<b>6a</b>	X
<b>b</b> If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	<b>6b</b>	
<b>7 Organizations that may receive deductible contributions under section 170(c).</b>		
<b>a</b> Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	<b>7a</b>	X
<b>b</b> If "Yes," did the organization notify the donor of the value of the goods or services provided?	<b>7b</b>	
<b>c</b> Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	<b>7c</b>	X
<b>d</b> If "Yes," indicate the number of Forms 8282 filed during the year	<b>7d</b>	
<b>e</b> Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<b>7e</b>	X
<b>f</b> Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	<b>7f</b>	X
<b>g</b> If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	<b>7g</b>	
<b>h</b> If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	<b>7h</b>	
<b>8 Sponsoring organizations maintaining donor advised funds.</b> Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?	<b>8</b>	
<b>9 Sponsoring organizations maintaining donor advised funds.</b>		
<b>a</b> Did the sponsoring organization make any taxable distributions under section 4966?	<b>9a</b>	
<b>b</b> Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?	<b>9b</b>	
<b>10 Section 501(c)(7) organizations.</b> Enter:		
<b>a</b> Initiation fees and capital contributions included on Part VIII, line 12	<b>10a</b>	
<b>b</b> Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	<b>10b</b>	
<b>11 Section 501(c)(12) organizations.</b> Enter:		
<b>a</b> Gross income from members or shareholders	<b>11a</b>	
<b>b</b> Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)	<b>11b</b>	
<b>12a Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?	<b>12a</b>	
<b>b</b> If "Yes," enter the amount of tax-exempt interest received or accrued during the year	<b>12b</b>	
<b>13 Section 501(c)(29) qualified nonprofit health insurance issuers.</b>		
<b>a</b> Is the organization licensed to issue qualified health plans in more than one state?	<b>13a</b>	
<b>Note:</b> See the instructions for additional information the organization must report on Schedule O.		
<b>b</b> Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	<b>13b</b>	
<b>c</b> Enter the amount of reserves on hand	<b>13c</b>	
<b>14a</b> Did the organization receive any payments for indoor tanning services during the tax year?	<b>14a</b>	X
<b>b</b> If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O	<b>14b</b>	
<b>15</b> Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	<b>15</b>	X
If "Yes," see instructions and file Form 4720, Schedule N.		
<b>16</b> Is the organization an educational institution subject to the section 4968 excise tax on net investment income?	<b>16</b>	X
If "Yes," complete Form 4720, Schedule O.		

Form 990 (2020)

**Part VI Governance, Management, and Disclosure** For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.

 Check if Schedule O contains a response or note to any line in this Part VI ☒
**Section A. Governing Body and Management**

	1a	1b	2	3	4	5	6	7a	7b	8a	8b	9	Yes	No
<b>1a</b> Enter the number of voting members of the governing body at the end of the tax year	5													
If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.														
<b>b</b> Enter the number of voting members included on line 1a, above, who are independent		5												
<b>2</b> Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?			2											X
<b>3</b> Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person?				3						X				
<b>4</b> Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?					4									X
<b>5</b> Did the organization become aware during the year of a significant diversion of the organization's assets?						5								X
<b>6</b> Did the organization have members or stockholders?							6							X
<b>7a</b> Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?								7a						X
<b>b</b> Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?									7b					X
<b>8</b> Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:														
<b>a</b> The governing body?										8a			X	
<b>b</b> Each committee with authority to act on behalf of the governing body?											8b			X
<b>9</b> Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O												9		X

**Section B. Policies** (This Section B requests information about policies not required by the Internal Revenue Code.)

	10a	10b	11a	11b	12a	12b	12c	13	14	15a	15b	16a	16b	Yes	No
<b>10a</b> Did the organization have local chapters, branches, or affiliates?	10a														X
<b>b</b> If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?		10b													
<b>11a</b> Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?			11a							X					
<b>b</b> Describe in Schedule O the process, if any, used by the organization to review this Form 990.															
<b>12a</b> Did the organization have a written conflict of interest policy? If "No," go to line 13					12a					X					
<b>b</b> Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?						12b				X					
<b>c</b> Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done							12c			X					
<b>13</b> Did the organization have a written whistleblower policy?								13							X
<b>14</b> Did the organization have a written document retention and destruction policy?									14						X
<b>15</b> Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?															
<b>a</b> The organization's CEO, Executive Director, or top management official										15a				X	
<b>b</b> Other officers or key employees of the organization											15b			X	
If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).															
<b>16a</b> Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?												16a			X
<b>b</b> If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?													16b		

**Section C. Disclosure**

**17** List the states with which a copy of this Form 990 is required to be filed **NONE**

**18** Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.

☐ Own website ☐ Another's website ☒ Upon request ☐ Other (explain on Schedule O)

**19** Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

**20** State the name, address, and telephone number of the person who possesses the organization's books and records **KELLY O'BRIEN - 661-722-4287**  
**3720 SIERRA HIGHWAY SUITE A, ACTON, CA 93510**

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**Check if Schedule O contains a response or note to any line in this Part VII ☐**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees****1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
  - List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."
  - List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
  - List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
  - List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.
- See instructions for the order in which to list the persons above.

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) DAWN EVENSON CEO / EXECUTIVE DIRECTOR O	40.00			X				170,629.	0.	37,734.
(2) AMANDA GALLION-FISCHER EXECUTIVE DIRECTOR	40.00			X				155,829.	0.	33,436.
(3) PATRICIA LOCKHART REGIONAL DIRECTOR OF SOUTHERN CALIFO	40.00				X			141,116.	0.	23,766.
(4) KIMBERLY LYTLE DIRECTOR OF BOARD, STAFF A	40.00				X			127,732.	0.	28,600.
(5) PATRICIA COLEMAN DIRECTOR OF MATH INSTRUCTI	40.00				X			130,807.	0.	22,331.
(6) AMBER ROGERS STUDENT SUPPORT CO- DIRECTOR, EXPLOR	40.00				X			122,457.	0.	21,120.
(7) LARA DURRELL DIRECTOR OF EXPLORATION	40.00				X			114,314.	0.	19,787.
(8) KELLY FRISCIA DIRECTOR OF BUSINESS SERVI	40.00			X				117,949.	0.	6,225.
(9) JOHN VESCOVO PRESIDENT	2.00	X		X				0.	0.	0.
(10) CHERI BRADFORD SECRETARY	2.00	X		X				0.	0.	0.
(11) KENCHY RAGSDALE TREASURER	2.00	X		X				0.	0.	0.
(12) DR PATRICK HILL MEMBER	2.00	X						0.	0.	0.
(13) KENNETH SCOTT MEMBER	2.00	X						0.	0.	0.

<b>Part VII</b>	<b>Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees</b> <i>(continued)</i>
-----------------	--

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
<b>1b Subtotal .....</b>								<b>1,080,833.</b>	<b>0.</b>	<b>192,999.</b>
<b>c Total from continuation sheets to Part VII, Section A .....</b>								<b>0.</b>	<b>0.</b>	<b>0.</b>
<b>d Total (add lines 1b and 1c) .....</b>								<b>1,080,833.</b>	<b>0.</b>	<b>192,999.</b>

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization ►

14

		Yes	No
3	Did the organization list any <b>former</b> officer, director, trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i> .....		X
4	For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i> .....	X	
5	Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i> .....		X

## Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

the organization report compensation for the calendar year ending with or within the organization's tax year.		
(A) Name and business address	(B) Description of services	(C) Compensation
NONE		
2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization ▶		0

**Part VIII Statement of Revenue**Check if Schedule O contains a response or note to any line in this Part VIII ☐

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
<b>Contributions, Gifts, Grants and Other Similar Amounts</b>	<b>1 a</b> Federated campaigns .....	<b>1a</b>					
	<b>b</b> Membership dues .....	<b>1b</b>					
	<b>c</b> Fundraising events .....	<b>1c</b>					
	<b>d</b> Related organizations .....	<b>1d</b>					
	<b>e</b> Government grants (contributions) .....	<b>1e</b>	36,298,683.				
	<b>f</b> All other contributions, gifts, grants, and similar amounts not included above ...	<b>1f</b>	5,072.				
	<b>g</b> Noncash contributions included in lines 1a-1f	<b>1g</b>	\$				
	<b>h Total.</b> Add lines 1a-1f .....			36,303,755.			
<b>Program Service Revenue</b>	<b>2 a</b> EDUCATIONAL AND MANAGEMENT FEES		<b>Business Code</b> 611710	10,134,718.	10,134,718.		
	<b>b</b> .....						
	<b>c</b> .....						
	<b>d</b> .....						
	<b>e</b> .....						
	<b>f</b> All other program service revenue .....						
	<b>g Total.</b> Add lines 2a-2f .....			10,134,718.			
	<b>Other Revenue</b>	<b>3</b> Investment income (including dividends, interest, and other similar amounts) .....					
<b>4</b> Income from investment of tax-exempt bond proceeds .....							
<b>5</b> Royalties .....							
<b>6 a</b> Gross rents .....		<b>6a</b>	(i) Real				
			(ii) Personal				
<b>b</b> Less: rental expenses ...		<b>6b</b>					
<b>c</b> Rental income or (loss)		<b>6c</b>					
<b>d</b> Net rental income or (loss) .....							
<b>7 a</b> Gross amount from sales of assets other than inventory		<b>7a</b>	(i) Securities				
			(ii) Other				
<b>b</b> Less: cost or other basis and sales expenses .....		<b>7b</b>					
<b>c</b> Gain or (loss) .....		<b>7c</b>					
<b>d</b> Net gain or (loss) .....							
<b>8 a</b> Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18 .....	<b>8a</b>						
<b>b</b> Less: direct expenses .....	<b>8b</b>						
<b>c</b> Net income or (loss) from fundraising events .....							
<b>9 a</b> Gross income from gaming activities. See Part IV, line 19 .....	<b>9a</b>						
<b>b</b> Less: direct expenses .....	<b>9b</b>						
<b>c</b> Net income or (loss) from gaming activities .....							
<b>10 a</b> Gross sales of inventory, less returns and allowances .....	<b>10a</b>						
<b>b</b> Less: cost of goods sold .....	<b>10b</b>						
<b>c</b> Net income or (loss) from sales of inventory .....							
<b>Miscellaneous Revenue</b>	<b>11 a</b> OTHER INCOME		<b>Business Code</b> 611710	155,378.	155,378.		
	<b>b</b> .....						
	<b>c</b> .....						
	<b>d</b> All other revenue .....						
	<b>e Total.</b> Add lines 11a-11d .....			155,378.			
	<b>12 Total revenue.</b> See instructions .....			46,593,851.	10,290,096.	0.	0.

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX

☒ X

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
<b>1</b> Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21				
<b>2</b> Grants and other assistance to domestic individuals. See Part IV, line 22				
<b>3</b> Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
<b>4</b> Benefits paid to or for members				
<b>5</b> Compensation of current officers, directors, trustees, and key employees	563,662.	429,230.	134,432.	
<b>6</b> Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
<b>7</b> Other salaries and wages	18,874,239.	16,583,351.	2,290,888.	
<b>8</b> Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	2,246,464.	2,246,464.		
<b>9</b> Other employee benefits	1,210,347.	1,159,455.	50,892.	
<b>10</b> Payroll taxes	546,334.	501,587.	44,747.	
<b>11</b> Fees for services (nonemployees):				
<b>a</b> Management				
<b>b</b> Legal	352,541.		352,541.	
<b>c</b> Accounting	79,243.		79,243.	
<b>d</b> Lobbying				
<b>e</b> Professional fundraising services. See Part IV, line 17				
<b>f</b> Investment management fees				
<b>g</b> Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch. O.)	8,668,813.	3,304,027.	5,364,786.	
<b>12</b> Advertising and promotion	10,741.		10,741.	
<b>13</b> Office expenses	16,238.	6,789.	9,449.	
<b>14</b> Information technology	477,829.	477,829.		
<b>15</b> Royalties				
<b>16</b> Occupancy	629,156.	629,156.		
<b>17</b> Travel	13,819.	13,819.		
<b>18</b> Payments of travel or entertainment expenses for any federal, state, or local public officials				
<b>19</b> Conferences, conventions, and meetings	251,448.	251,448.		
<b>20</b> Interest	13,216.		13,216.	
<b>21</b> Payments to affiliates				
<b>22</b> Depreciation, depletion, and amortization				
<b>23</b> Insurance	568,999.		568,999.	
<b>24</b> Other expenses. Itemize expenses not covered above (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
<b>a</b> <b>INSTRUCTIONAL MATERIALS</b>	8,070,660.	8,070,660.		
<b>b</b> <b>OPERATING EXPENSES</b>	304,635.	284,876.	19,759.	
<b>c</b>				
<b>d</b>				
<b>e</b> All other expenses				
<b>25</b> Total functional expenses. Add lines 1 through 24e	42,898,384.	33,958,691.	8,939,693.	0.
<b>26</b> Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.				

Check here ☐ if following SOP 98-2 (ASC 958-720)



**Part X Balance Sheet**Check if Schedule O contains a response or note to any line in this Part X ☐

		(A) Beginning of year		(B) End of year
<b>Assets</b>	<b>1</b> Cash - non-interest-bearing .....		<b>1</b>	849,582.
	<b>2</b> Savings and temporary cash investments .....		<b>2</b>	
	<b>3</b> Pledges and grants receivable, net .....		<b>3</b>	
	<b>4</b> Accounts receivable, net .....	5,733,333.	<b>4</b>	19,528,729.
	<b>5</b> Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons .....		<b>5</b>	
	<b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B) .....		<b>6</b>	
	<b>7</b> Notes and loans receivable, net .....		<b>7</b>	
	<b>8</b> Inventories for sale or use .....		<b>8</b>	
	<b>9</b> Prepaid expenses and deferred charges .....	6,321.	<b>9</b>	11,090.
	<b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D .....	<b>10a</b> 0.		
	<b>b</b> Less: accumulated depreciation .....	<b>10b</b>	<b>10c</b>	
	<b>11</b> Investments - publicly traded securities .....		<b>11</b>	
	<b>12</b> Investments - other securities. See Part IV, line 11 .....		<b>12</b>	
	<b>13</b> Investments - program-related. See Part IV, line 11 .....		<b>13</b>	
	<b>14</b> Intangible assets .....		<b>14</b>	
	<b>15</b> Other assets. See Part IV, line 11 .....		<b>15</b>	
<b>16</b> <b>Total assets.</b> Add lines 1 through 15 (must equal line 33) .....	5,751,028.	<b>16</b>	20,389,401.	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses .....	797,867.	<b>17</b>	3,920,636.
	<b>18</b> Grants payable .....		<b>18</b>	
	<b>19</b> Deferred revenue .....		<b>19</b>	1,285,805.
	<b>20</b> Tax-exempt bond liabilities .....		<b>20</b>	
	<b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D .....		<b>21</b>	
	<b>22</b> Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons .....		<b>22</b>	
	<b>23</b> Secured mortgages and notes payable to unrelated third parties .....		<b>23</b>	
	<b>24</b> Unsecured notes and loans payable to unrelated third parties .....	3,194,612.	<b>24</b>	9,728,944.
	<b>25</b> Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D .....		<b>25</b>	
	<b>26</b> <b>Total liabilities.</b> Add lines 17 through 25 .....	3,992,479.	<b>26</b>	14,935,385.
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow FASB ASC 958, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 27, 28, 32, and 33.</b>			
	<b>27</b> Net assets without donor restrictions .....	1,758,549.	<b>27</b>	5,454,016.
	<b>28</b> Net assets with donor restrictions .....		<b>28</b>	
	<b>Organizations that do not follow FASB ASC 958, check here</b> <input type="checkbox"/> <b>and complete lines 29 through 33.</b>			
	<b>29</b> Capital stock or trust principal, or current funds .....		<b>29</b>	
	<b>30</b> Paid-in or capital surplus, or land, building, or equipment fund .....		<b>30</b>	
	<b>31</b> Retained earnings, endowment, accumulated income, or other funds .....		<b>31</b>	
	<b>32</b> <b>Total net assets or fund balances</b> .....	1,758,549.	<b>32</b>	5,454,016.
	<b>33</b> <b>Total liabilities and net assets/fund balances</b> .....	5,751,028.	<b>33</b>	20,389,401.

Form 990 (2020)

**Part XI Reconciliation of Net Assets**Check if Schedule O contains a response or note to any line in this Part XI ☐

<b>1</b>	Total revenue (must equal Part VIII, column (A), line 12)	<b>1</b>	46,593,851.
<b>2</b>	Total expenses (must equal Part IX, column (A), line 25)	<b>2</b>	42,898,384.
<b>3</b>	Revenue less expenses. Subtract line 2 from line 1	<b>3</b>	3,695,467.
<b>4</b>	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	<b>4</b>	1,758,549.
<b>5</b>	Net unrealized gains (losses) on investments	<b>5</b>	
<b>6</b>	Donated services and use of facilities	<b>6</b>	
<b>7</b>	Investment expenses	<b>7</b>	
<b>8</b>	Prior period adjustments	<b>8</b>	
<b>9</b>	Other changes in net assets or fund balances (explain on Schedule O)	<b>9</b>	0.
<b>10</b>	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	<b>10</b>	5,454,016.

**Part XII Financial Statements and Reporting**Check if Schedule O contains a response or note to any line in this Part XII ☐

	Yes	No
<b>1</b> Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.		
<b>2a</b> Were the organization's financial statements compiled or reviewed by an independent accountant? _____ If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	<b>2a</b>	<b>X</b>
<b>b</b> Were the organization's financial statements audited by an independent accountant? _____ If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	<b>2b</b>	<b>X</b>
<b>c</b> If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? _____ If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.	<b>2c</b>	
<b>3a</b> As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? _____	<b>3a</b>	<b>X</b>
<b>b</b> If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits _____	<b>3b</b>	

Form 990 (2020)

Department of the Treasury  
Internal Revenue Service

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

2020

**Open to Public Inspection**

Name of the organization

ILEAD CALIFORNIA CHARTERS 1

Employer identification number

47-4286845

<b>Part I</b>	<b>Reason for Public Charity Status.</b> (All organizations must complete this part.) See instructions.
---------------	---

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1 ☐ A church, convention, congregation of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2 ☒ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990 or 990-EZ).)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: \_\_\_\_\_
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7 ☐ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 9 ☐ An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: \_\_\_\_\_
- 10 ☐ An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
- 11 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 12 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
  - a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
  - b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
  - c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
  - d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
  - e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.

**f** Enter the number of supported organizations

**g** Provide the following information about the supported organization(s).

g Provide the following information about the supported organization(s).						
(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
<b>Total</b>						

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ. 032021 01-25-21 Schedule A (Form 990 or 990-EZ) 2020

**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ►	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....						
<b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....						
<b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....						
<b>4 Total.</b> Add lines 1 through 3 .....						
<b>5</b> The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) .....						
<b>6 Public support.</b> Subtract line 5 from line 4.						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ►	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
<b>7</b> Amounts from line 4 .....						
<b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources .....						
<b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on .....						
<b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....						
<b>11 Total support.</b> Add lines 7 through 10						
<b>12</b> Gross receipts from related activities, etc. (see instructions) .....					12	
<b>13 First 5 years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> .....						<input type="checkbox"/>

**Section C. Computation of Public Support Percentage**

<b>14</b> Public support percentage for 2020 (line 6, column (f), divided by line 11, column (f)) .....	14	%
<b>15</b> Public support percentage from 2019 Schedule A, Part II, line 14 .....	15	%
<b>16a 33 1/3% support test - 2020.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....		
<input type="checkbox"/>		
<b>b 33 1/3% support test - 2019.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....		
<input type="checkbox"/>		
<b>17a 10% -facts-and-circumstances test - 2020.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization .....		
<input type="checkbox"/>		
<b>b 10% -facts-and-circumstances test - 2019.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization .....		
<input type="checkbox"/>		
<b>18 Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions .....		
<input type="checkbox"/>		

Schedule A (Form 990 or 990-EZ) 2020

**Part III Support Schedule for Organizations Described in Section 509(a)(2)**

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ►	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....						
<b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose .....						
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513 .....						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....						
<b>6 Total.</b> Add lines 1 through 5 .....						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons .....						
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year .....						
<b>c</b> Add lines 7a and 7b .....						
<b>8 Public support.</b> (Subtract line 7c from line 6.)						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ►	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
<b>9</b> Amounts from line 6 .....						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources .....						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 .....						
<b>c</b> Add lines 10a and 10b .....						
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on .....						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....						
<b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.)						

**14 First 5 years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ..... ► ☐

**Section C. Computation of Public Support Percentage**

<b>15</b> Public support percentage for 2020 (line 8, column (f), divided by line 13, column (f)) .....	<b>15</b>	%
<b>16</b> Public support percentage from 2019 Schedule A, Part III, line 15 .....	<b>16</b>	%

**Section D. Computation of Investment Income Percentage**

<b>17</b> Investment income percentage for 2020 (line 10c, column (f), divided by line 13, column (f)) .....	<b>17</b>	%
<b>18</b> Investment income percentage from 2019 Schedule A, Part III, line 17 .....	<b>18</b>	%

**19a 33 1/3% support tests - 2020.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ..... ► ☐

**b 33 1/3% support tests - 2019.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ..... ► ☐

**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ..... ► ☐

**Part IV Supporting Organizations**

(Complete only if you checked a box in line 12 on Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

**Section A. All Supporting Organizations**

	Yes	No
<b>1</b> Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>		
<b>2</b> Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
<b>3a</b> Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer lines 3b and 3c below.</i>		
<b>b</b> Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
<b>c</b> Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
<b>4a</b> Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.</i>		
<b>b</b> Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>		
<b>c</b> Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? <i>If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.</i>		
<b>5a</b> Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).</i>		
<b>b</b> <b>Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
<b>c</b> <b>Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?		
<b>6</b> Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>		
<b>7</b> Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
<b>8</b> Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
<b>9a</b> Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? <i>If "Yes," provide detail in Part VI.</i>		
<b>b</b> Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>		
<b>c</b> Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>		
<b>10a</b> Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer line 10b below.</i>		
<b>b</b> Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>		

**Part IV Supporting Organizations** (continued)

	Yes	No
<b>11</b> Has the organization accepted a gift or contribution from any of the following persons?		
<b>a</b> A person who directly or indirectly controls, either alone or together with persons described in lines 11b and 11c below, the governing body of a supported organization?		
<b>11a</b>		
<b>b</b> A family member of a person described in line 11a above?		
<b>11b</b>		
<b>c</b> A 35% controlled entity of a person described in line 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, provide detail in <b>Part VI</b> .		
<b>11c</b>		

**Section B. Type I Supporting Organizations**

	Yes	No
<b>1</b> Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? If "No," describe in <b>Part VI</b> how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.		
<b>1</b>		
<b>2</b> Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in <b>Part VI</b> how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.		
<b>2</b>		

**Section C. Type II Supporting Organizations**

	Yes	No
<b>1</b> Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in <b>Part VI</b> how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).		
<b>1</b>		

**Section D. All Type III Supporting Organizations**

	Yes	No
<b>1</b> Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
<b>1</b>		
<b>2</b> Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in <b>Part VI</b> how the organization maintained a close and continuous working relationship with the supported organization(s).		
<b>2</b>		
<b>3</b> By reason of the relationship described in line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in <b>Part VI</b> the role the organization's supported organizations played in this regard.		
<b>3</b>		

**Section E. Type III Functionally Integrated Supporting Organizations**

<b>1</b> Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).			
<b>a</b> <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.			
<b>b</b> <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.			
<b>c</b> <input type="checkbox"/> The organization supported a governmental entity. Describe in <b>Part VI</b> how you supported a governmental entity (see instructions).			
<b>2</b> Activities Test. Answer lines 2a and 2b below.			
<b>a</b> Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in <b>Part VI</b> identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.			
<b>2a</b>			
<b>b</b> Did the activities described in line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in <b>Part VI</b> the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.			
<b>2b</b>			
<b>3</b> Parent of Supported Organizations. Answer lines 3a and 3b below.			
<b>a</b> Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? If "Yes" or "No" provide details in <b>Part VI</b> .			
<b>3a</b>			
<b>b</b> Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in <b>Part VI</b> the role played by the organization in this regard.			
<b>3b</b>			

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

- 1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 ( *explain in Part VI*). See instructions.  
All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3.	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	<b>Adjusted Net Income</b> (subtract lines 5, 6, and 7 from line 4)	8	

Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	<b>Total</b> (add lines 1a, 1b, and 1c)	1d	
e	<b>Discount</b> claimed for blockage or other factors ( <i>explain in detail in Part VI</i> ):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d.	3	
4	Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by 0.035.	6	
7	Recoveries of prior-year distributions	7	
8	<b>Minimum Asset Amount</b> (add line 7 to line 6)	8	

Section C - Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, column A)	1	
2	Enter 0.85 of line 1.	2	
3	Minimum asset amount for prior year (from Section B, line 8, column A)	3	
4	Enter greater of line 2 or line 3.	4	
5	Income tax imposed in prior year	5	
6	<b>Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	6	
7	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).		

Schedule A (Form 990 or 990-EZ) 2020



**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations** (continued)

Section D - Distributions		Current Year
<b>1</b> Amounts paid to supported organizations to accomplish exempt purposes	<b>1</b>	
<b>2</b> Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	<b>2</b>	
<b>3</b> Administrative expenses paid to accomplish exempt purposes of supported organizations	<b>3</b>	
<b>4</b> Amounts paid to acquire exempt-use assets	<b>4</b>	
<b>5</b> Qualified set-aside amounts (prior IRS approval required - <i>provide details in Part VI</i> )	<b>5</b>	
<b>6</b> Other distributions ( <i>describe in Part VI</i> ). See instructions.	<b>6</b>	
<b>7</b> <b>Total annual distributions.</b> Add lines 1 through 6.	<b>7</b>	
<b>8</b> Distributions to attentive supported organizations to which the organization is responsive ( <i>provide details in Part VI</i> ). See instructions.	<b>8</b>	
<b>9</b> Distributable amount for 2020 from Section C, line 6	<b>9</b>	
<b>10</b> Line 8 amount divided by line 9 amount	<b>10</b>	

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2020	(iii) Distributable Amount for 2020
<b>1</b> Distributable amount for 2020 from Section C, line 6			
<b>2</b> Underdistributions, if any, for years prior to 2020 (reasonable cause required - <i>explain in Part VI</i> ). See instructions.			
<b>3</b> Excess distributions carryover, if any, to 2020			
<b>a</b> From 2015			
<b>b</b> From 2016			
<b>c</b> From 2017			
<b>d</b> From 2018			
<b>e</b> From 2019			
<b>f</b> <b>Total</b> of lines 3a through 3e			
<b>g</b> Applied to underdistributions of prior years			
<b>h</b> Applied to 2020 distributable amount			
<b>i</b> Carryover from 2015 not applied (see instructions)			
<b>j</b> Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
<b>4</b> Distributions for 2020 from Section D, line 7: \$			
<b>a</b> Applied to underdistributions of prior years			
<b>b</b> Applied to 2020 distributable amount			
<b>c</b> Remainder. Subtract lines 4a and 4b from line 4.			
<b>5</b> Remaining underdistributions for years prior to 2020, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, <i>explain in Part VI</i> . See instructions.			
<b>6</b> Remaining underdistributions for 2020. Subtract lines 3h and 4b from line 1. For result greater than zero, <i>explain in Part VI</i> . See instructions.			
<b>7</b> <b>Excess distributions carryover to 2021.</b> Add lines 3j and 4c.			
<b>8</b> Breakdown of line 7:			
<b>a</b> Excess from 2016			
<b>b</b> Excess from 2017			
<b>c</b> Excess from 2018			
<b>d</b> Excess from 2019			
<b>e</b> Excess from 2020			

Schedule A (Form 990 or 990-EZ) 2020

## Part VI

**Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information.  
(See instructions.)

**SCHEDULE E**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Schools**

► **Complete if the organization answered "Yes" on Form 990,  
Part IV, line 13, or Form 990-EZ, Part VI, line 48.**

► **Attach to Form 990 or Form 990-EZ.**

► **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.**

OMB No. 1545-0047

**2020**

**Open to Public  
Inspection**

Name of the organization

**ILEAD CALIFORNIA CHARTERS 1**

Employer identification number

**47-4286845**

**Part I**

- 1** Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body? .....
- 2** Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions, programs, and scholarships? .....
- 3** Has the organization publicized its racially nondiscriminatory policy on its primary publicly accessible Internet homepage at all times during its taxable year in a manner reasonably expected to be noticed by visitors to the homepage, or through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program, in a way that makes the policy known to all parts of the general community it serves? If "Yes," please describe. If "No," please explain. If you need more space, use Part II .....
- THE CHARTER MAKES ITS NONDISCRIMINATORY POLICY KNOWN THROUGH ITS WEBSITE AND ON THE STUDENTS' APPLICATIONS. THE CHARTER DRAWS ITS STUDENTS FROM THE LOCAL COMMUNITY, AND CURRENTLY ENROLLS STUDENTS FROM VARIOUS RACIAL MINORITY GROUPS.**

- 4** Does the organization maintain the following?
- a** Records indicating the racial composition of the student body, faculty, and administrative staff? .....
- b** Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis? .....
- c** Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships? .....
- d** Copies of all material used by the organization or on its behalf to solicit contributions? .....
- If you answered "No" to any of the above, please explain. If you need more space, use Part II.
- THE ORGANIZATION DOES NOT PROVIDE SCHOLARSHIPS OR FINANCIAL AID.**

- 5** Does the organization discriminate by race in any way with respect to:
- a** Students' rights or privileges? .....
- b** Admissions policies? .....
- c** Employment of faculty or administrative staff? .....
- d** Scholarships or other financial assistance? .....
- e** Educational policies? .....
- f** Use of facilities? .....
- g** Athletic programs? .....
- h** Other extracurricular activities? .....
- If you answered "Yes" to any of the above, please explain. If you need more space, use Part II.

- 6a** Does the organization receive any financial aid or assistance from a governmental agency? .....
- b** Has the organization's right to such aid ever been revoked or suspended? .....
- If you answered "Yes" on either line 6a or line 6b, explain on Part II.
- 7** Does the organization certify that it has complied with the applicable requirements of sections 4.01 through 4.05 of Rev. Proc. 75-50, 1975-2 C.B. 587, covering racial nondiscrimination? If "No," explain on Part II .....

	YES	NO
<b>1</b>	<b>X</b>	
<b>2</b>	<b>X</b>	
<b>3</b>	<b>X</b>	
<b>4a</b>	<b>X</b>	
<b>4b</b>		<b>X</b>
<b>4c</b>	<b>X</b>	
<b>4d</b>	<b>X</b>	
<b>5a</b>		<b>X</b>
<b>5b</b>		<b>X</b>
<b>5c</b>		<b>X</b>
<b>5d</b>		<b>X</b>
<b>5e</b>		<b>X</b>
<b>5f</b>		<b>X</b>
<b>5g</b>		<b>X</b>
<b>5h</b>		<b>X</b>
<b>6a</b>	<b>X</b>	
<b>6b</b>		<b>X</b>
<b>7</b>	<b>X</b>	

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or Form 990-EZ.

Schedule E (Form 990 or 990-EZ) 2020

**Part II** **Supplemental Information.** Provide the explanations required by Part I, lines 3, 4d, 5h, 6b, and 7, as applicable. Also provide any other additional information.

**LINE 6 - EXPLANATION OF GOVERNMENT FINANCIAL AID:**

THE ORGANIZATION IS A PUBLIC CHARTER SCHOOL PRINCIPALLY FUNDED BY  
CALIFORNIA AND FEDERAL MONIES RECEIVED THROUGH THE CALIFORNIA DEPARTMENT  
OF EDUCATION.

**SCHEDULE J  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Compensation Information**

- For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees
- ▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 23.**
- ▶ **Attach to Form 990.**
- ▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.**

OMB No. 1545-0047

**2020**

Open to Public  
Inspection

Name of the organization

**ILEAD CALIFORNIA CHARTERS 1**

Employer identification number

**47-4286845**

**Part I Questions Regarding Compensation**

	Yes	No
<b>1a</b> Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.		
<input type="checkbox"/> First-class or charter travel		
<input type="checkbox"/> Travel for companions		
<input type="checkbox"/> Tax indemnification and gross-up payments		
<input type="checkbox"/> Discretionary spending account		
<input type="checkbox"/> Housing allowance or residence for personal use		
<input type="checkbox"/> Payments for business use of personal residence		
<input type="checkbox"/> Health or social club dues or initiation fees		
<input type="checkbox"/> Personal services (such as maid, chauffeur, chef)		
<b>b</b> If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain .....	<b>1b</b>	
<b>2</b> Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a? .....	<b>2</b>	
<b>3</b> Indicate which, if any, of the following the organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.		
<input type="checkbox"/> Compensation committee		
<input type="checkbox"/> Independent compensation consultant		
<input type="checkbox"/> Form 990 of other organizations		
<input checked="" type="checkbox"/> Written employment contract		
<input checked="" type="checkbox"/> Compensation survey or study		
<input checked="" type="checkbox"/> Approval by the board or compensation committee		
<b>4</b> During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:		
<b>a</b> Receive a severance payment or change-of-control payment? .....	<b>4a</b>	<b>X</b>
<b>b</b> Participate in or receive payment from a supplemental nonqualified retirement plan? .....	<b>4b</b>	<b>X</b>
<b>c</b> Participate in or receive payment from an equity-based compensation arrangement? .....	<b>4c</b>	<b>X</b>
If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.		
<b>Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.</b>		
<b>5</b> For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:		
<b>a</b> The organization? .....	<b>5a</b>	<b>X</b>
<b>b</b> Any related organization? .....	<b>5b</b>	<b>X</b>
If "Yes" on line 5a or 5b, describe in Part III.		
<b>6</b> For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:		
<b>a</b> The organization? .....	<b>6a</b>	<b>X</b>
<b>b</b> Any related organization? .....	<b>6b</b>	<b>X</b>
If "Yes" on line 6a or 6b, describe in Part III.		
<b>7</b> For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If "Yes," describe in Part III .....	<b>7</b>	<b>X</b>
<b>8</b> Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III .....	<b>8</b>	<b>X</b>
<b>9</b> If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)? .....	<b>9</b>	

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule J (Form 990) 2020

**Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that aren't listed on Form 990, Part VII.

**Note:** The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
(1) DAWN EVENSON	(i)	170,629.	0.	0.	31,503.	6,231.	208,363.	0.
CEO / EXECUTIVE DIRECTOR O	(ii)	0.	0.	0.	0.	0.	0.	0.
(2) AMANDA GALLION-FISCHER	(i)	155,829.	0.	0.	27,205.	6,231.	189,265.	0.
EXECUTIVE DIRECTOR	(ii)	0.	0.	0.	0.	0.	0.	0.
(3) PATRICIA LOCKHART	(i)	141,116.	0.	0.	23,607.	159.	164,882.	0.
REGIONAL DIRECTOR OF SOUTHERN CALIFO	(ii)	0.	0.	0.	0.	0.	0.	0.
(4) KIMBERLY LYTLE	(i)	127,732.	0.	0.	22,278.	6,322.	156,332.	0.
DIRECTOR OF BOARD, STAFF A	(ii)	0.	0.	0.	0.	0.	0.	0.
(5) PATRICIA COLEMAN	(i)	130,807.	0.	0.	21,612.	719.	153,138.	0.
DIRECTOR OF MATH INSTRUCTI	(ii)	0.	0.	0.	0.	0.	0.	0.
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							

**Part III** Supplemental Information

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

PART I, LINE 3:

HUMAN RESOURCES PERFORMS MARKET RESEARCH BASED ON INDUSTRY AND SIZE WHEN  
DETERMINING COMPENSATION FOR OFFICERS OR KEY EMPLOYEES OF THE ORGANIZATION.  
THE BOARD REVIEWS AND APPROVES THE COMPENSATION AMOUNTS.

**SCHEDULE O**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Information to Form 990 or 990-EZ**

Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2020**

Open to Public  
Inspection

Name of the organization

ILEAD CALIFORNIA CHARTERS 1

Employer identification number

47-4286845

FORM 990, PART VI, SECTION A, LINE 3:

THE CHARTER SCHOOL IS A MEMBER OF A CHARTER MANAGEMENT ORGANIZATION - ILEAD CALIFORNIA 1 DEVELOPMENT. THEY PAY MANAGEMENT FEES AND SHARE SOME PAID EMPLOYEES. SEE SCHEDULE R FOR MORE INFORMATION.

FORM 990, PART VI, SECTION A, LINE 8B:

THERE ARE NO COMMITTEES THAT HAVE THE AUTHORITY TO ACT ON BEHALF OF THE BOARD.

FORM 990, PART VI, SECTION B, LINE 11B:

THE FORM 990 IS PREPARED BY THE ORGANIZATION'S OUTSIDE PUBLIC ACCOUNTING FIRM BASED ON INFORMATION PROVIDED BY MANAGEMENT. ONCE A DRAFT OF THE RETURN IS AVAILABLE, IT IS REVIEWED BY MANAGEMENT WITH ANY CHANGES OR REVISIONS INCORPORATED INTO THE FILING. THE REVISED RETURN IS THEN SUBMITTED TO THE BOARD OF DIRECTORS FOR THEIR REVIEW AND APPROVAL PRIOR TO SUBMITTING TO THE IRS.

FORM 990, PART VI, SECTION B, LINE 12C:

THE OFFICERS, DIRECTORS, AND THE TRUSTEES ARE REQUIRED TO DISCLOSE ALL POTENTIAL CONFLICT OF INTERESTS. THE BOARD REVIEWS ANY CONFLICTS PRESENTED BY INTERESTED PARTIES. THE CHAIRPERSON APPOINTS A DISINTERESTED PERSON OR COMMITTEE TO INVESTIGATE THE TRANSACTION IN QUESTION AND REPORT FINDINGS TO THE BOARD. ALTERNATIVES TO THE PROPOSED TRANSACTION ARE IDENTIFIED AND COMPARED TO THE PROPOSED TRANSACTION. THE BOARD VOTES ON THE MOST BENEFICIAL OPTION FOR THE ORGANIZATION. IF THE BOARD HAS REASON TO BELIEVE AN INTERESTED PERSON HAS FAILED TO DISCLOSE THE POTENTIAL CONFLICT, THE

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule O (Form 990 or 990-EZ) 2020

032211 11-20-20



Name of the organization

ILEAD CALIFORNIA CHARTERS 1

Employer identification number

47-4286845

BOARD WILL INVESTIGATE FURTHER AND IF NECESSARY, TAKE APPROPRIATE  
DISCIPLINARY AND CORRECTIVE ACTION.

FORM 990, PART VI, SECTION B, LINE 15:

CURRENTLY THE COMPENSATION OF THE ORGANIZATION'S KEY OFFICERS ARE REVIEWED  
AND APPROVED BY THE BOARD. THE BOARD REVIEWS AND APPROVES THE COMPENSATION  
BASED UPON COMPARABLE SALARIES AND IS APPROVED IN THE MINUTES. HUMAN  
RESOURCES PERFORMS MARKET RESEARCH BASED ON INDUSTRY AND SIZE WHEN  
DETERMINING COMPENSATION FOR OFFICERS OR KEY EMPLOYEES OF THE ORGANIZATION.  
THE BOARD REVIEWS AND APPROVES THE COMPENSATION AMOUNTS.

FORM 990, PART VI, SECTION C, LINE 19:

THE DOCUMENTS ARE READILY AVAILABLE TO THE PUBLIC UPON REQUEST.

FORM 990, PART IX, LINE 11G, OTHER FEES:

SERVICE FEES:

PROGRAM SERVICE EXPENSES	0.
MANAGEMENT AND GENERAL EXPENSES	5,025,030.
FUNDRAISING EXPENSES	0.
TOTAL EXPENSES	5,025,030.

SPECIAL EDUCATION:

PROGRAM SERVICE EXPENSES	2,814,618.
MANAGEMENT AND GENERAL EXPENSES	0.
FUNDRAISING EXPENSES	0.
TOTAL EXPENSES	2,814,618.

STUDENT SERVICES:

Name of the organization

ILEAD CALIFORNIA CHARTERS 1

Employer identification number

47-4286845

PROGRAM SERVICE EXPENSES	216,829.
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MANAGEMENT AND GENERAL EXPENSES	0.
---------------------------------	----

FUNDRAISING EXPENSES	0.
----------------------	----

TOTAL EXPENSES	216,829.
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## OTHER SERVICES:

PROGRAM SERVICE EXPENSES	272,580.
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MANAGEMENT AND GENERAL EXPENSES	339,756.
---------------------------------	----------

FUNDRAISING EXPENSES	0.
----------------------	----

TOTAL EXPENSES	612,336.
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TOTAL OTHER FEES ON FORM 990, PART IX, LINE 11G, COL A	8,668,813.
--	------------

2020

# California Exempt Organization Annual Information Return

199

Calendar Year 2020 or fiscal year beginning (mm/dd/yyyy) 07/01/2020, and ending (mm/dd/yyyy) 06/30/2021

Corporation/Organization name

I LEAD CALIFORNIA CHARTERS 1

Additional information. See instructions.

California corporation number

3793934

FEIN

47-4286845

Street address (suite or room)

3720 SIERRA HWY STE A

City

ACTON

State

CA

ZIP code

93510

Foreign country name

Foreign province/state/county

Foreign postal code

- A** First return ☐ Yes ☒ No
- B** Amended return ☐ Yes ☒ No
- C** IRC Section 4947(a)(1) trust ☐ Yes ☒ No
- D** Final information return?
- ☐ Dissolved ☐ Surrendered (Withdrawn) ☐ Merged/Reorganized
- Enter date: (mm/dd/yyyy) • \_\_\_\_\_
- E** Check accounting method: (1) ☐ Cash (2) ☒ Accrual (3) ☐ Other
- F** Federal return filed? (1) • ☐ 990T (2) • ☐ 990PF (3) • ☐ Sch H (990) (4) ☒ Other 990 series
- G** Is this a group filing? See instructions ☐ Yes ☒ No
- H** Is this organization in a group exemption ☐ Yes ☒ No
- If "Yes," what is the parent's name? \_\_\_\_\_

- I** Did the organization have any changes to its guidelines not reported to the FTB? See instructions ☐ Yes ☒ No
- J** If exempt under R&TC Section 23701d, has the organization engaged in political activities? See instructions. ☐ Yes ☒ No
- K** Is the organization exempt under R&TC Section 23701g? ☐ Yes ☒ No
- If "Yes," enter the gross receipts from nonmember sources \$ \_\_\_\_\_
- L** Is the organization a limited liability company? ☐ Yes ☒ No
- M** Did the organization file Form 100 or Form 109 to report taxable income? ☐ Yes ☒ No
- N** Is the organization under audit by the IRS or has the IRS audited in a prior year? ☐ Yes ☒ No
- O** Is federal Form 1023/1024 pending? ☐ Yes ☒ No
- Date filed with IRS \_\_\_\_\_

**Part I** Complete Part I unless not required to file this form. See General Information B and C.

Receipts and Revenues	1	Gross sales or receipts from other sources. From Side 2, Part II, line 8	10,290,096	00
	2	Gross dues and assessments from members and affiliates		00
	3	Gross contributions, gifts, grants, and similar amounts received	36,303,755	00
	4	Total gross receipts for filing requirement test. Add line 1 through line 3. <b>This line must be completed.</b> If the result is less than \$50,000, see General Information B	46,593,851	00
	5	Cost of goods sold	5	00
	6	Cost or other basis, and sales expenses of assets sold	6	00
	7	Total costs. Add line 5 and line 6		00
	8	Total gross income. Subtract line 7 from line 4	46,593,851	00
Expenses	9	Total expenses and disbursements. From Side 2, Part II, line 18	42,898,384	00
	10	Excess of receipts over expenses and disbursements. Subtract line 9 from line 8	3,695,467	00
Filing Fee	11	Total payments		00
	12	Use tax. See General Information K		00
	13	Payments balance. If line 11 is more than line 12, subtract line 12 from line 11		00
	14	Use tax balance. If line 12 is more than line 11, subtract line 11 from line 12		00
	15	Penalties and Interest. See General Information J		00
	16	Balance due. Add line 12 and line 15. Then subtract line 11 from the result		00
Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.			
	Signature of officer	Title <b>PRESIDENT</b>	Date	• Telephone <b>800-925-1502</b>
Paid Preparer's Use Only	Preparer's signature	WADE MCMULLEN	Date 05/11/22	Check if self-employed <input type="checkbox"/> • PTIN <b>P00541671</b>
	Firm's name (or yours, if self-employed) and address	CLIFTONLARSONALLEN LLP 2210 EAST ROUTE 66 GLEN DORA, CA 91740		• Firm's FEIN <b>41-0746749</b>
				• Telephone <b>(626) 857-7300</b>
		May the FTB discuss this return with the preparer shown above? See instructions <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		

**Part II** Organizations with gross receipts of more than \$50,000 and private foundations regardless of amount of gross receipts - complete Part II or furnish substitute information.

028951 12-22-20

Receipts from Other Sources	1	Gross sales or receipts from all business activities. See instructions	•	1		00
	2	Interest	•	2		00
	3	Dividends	•	3		00
	4	Gross rents	•	4		00
	5	Gross royalties	•	5		00
	6	Gross amount received from sale of assets (See Instructions)	•	6		00
	7	Other income SEE STATEMENT 1	•	7	10,290,096	00
	8	Total gross sales or receipts from other sources. Add line 1 through line 7. Enter here and on Side 1, Part I, line 1	•	8	10,290,096	00
	9	Contributions, gifts, grants, and similar amounts paid	•	9		00
Expenses and Disbursements	10	Disbursements to or for members	•	10		00
	11	Compensation of officers, directors, and trustees SEE STATEMENT 2	•	11	563,662	00
	12	Other salaries and wages	•	12	18,874,239	00
	13	Interest	•	13	13,216	00
	14	Taxes	•	14	546,334	00
	15	Rents	•	15	629,156	00
	16	Depreciation and depletion (See instructions)	•	16		00
	17	Other expenses and disbursements SEE STATEMENT 3	•	17	22,271,777	00
	18	Total expenses and disbursements. Add line 9 through line 17. Enter here and on Side 1, Part I, line 9	•	18	42,898,384	00

**Schedule L Balance Sheet**

Beginning of taxable year

End of taxable year

Assets	(a)	(b)	(c)	(d)
1 Cash			•	849,582
2 Net accounts receivable		5,733,333	•	19,528,729
3 Net notes receivable			•	
4 Inventories			•	
5 Federal and state government obligations			•	
6 Investments in other bonds			•	
7 Investments in stock			•	
8 Mortgage loans			•	
9 Other investments			•	
10 a Depreciable assets	11,374			
b Less accumulated depreciation	( )	11,374	( )	
11 Land			•	
12 Other assets STMT 4		6,321	•	11,090
13 Total assets		5,751,028		20,389,401
<b>Liabilities and net worth</b>				
14 Accounts payable		797,867	•	3,920,636
15 Contributions, gifts, or grants payable			•	
16 Bonds and notes payable			•	
17 Mortgages payable			•	
18 Other liabilities STMT 5		3,194,612		11,014,749
19 Capital stock or principal fund			•	
20 Paid-in or capital surplus. Attach reconciliation			•	
21 Retained earnings or income fund		1,758,549	•	5,454,016
22 Total liabilities and net worth		5,751,028		20,389,401

**Schedule M-1 Reconciliation of income per books with income per return**

Do not complete this schedule if the amount on Schedule L, line 13, column (d), is less than \$50,000.

1 Net income per books	•	3,695,467	7 Income recorded on books this year not included in this return	•	
2 Federal income tax	•		8 Deductions in this return not charged against book income this year	•	
3 Excess of capital losses over capital gains	•		9 Total. Add line 7 and line 8		
4 Income not recorded on books this year	•		10 Net income per return.		
5 Expenses recorded on books this year not deducted in this return	•		Subtract line 9 from line 6		3,695,467
6 Total. Add line 1 through line 5		3,695,467			

CA 199

OTHER INCOME

STATEMENT 1

DESCRIPTION

AMOUNT

OTHER INCOME

155,378.

EDUCATIONAL AND MANAGEMENT FEES

10,134,718.

TOTAL TO FORM 199, PART II, LINE 7

10,290,096.

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CA 199                      COMPENSATION OF OFFICERS, DIRECTORS AND TRUSTEES                      STATEMENT 2

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NAME AND ADDRESS	TITLE AND AVERAGE HRS WORKED/WK	COMPENSATION
DAWN EVENSON 3720 SIERRA HWY STE A ACTON, CA 93510	CEO / EXECUTIVE DIRECTOR O 40.00	232,394.
AMANDA GALLION-FISCHER 3720 SIERRA HWY STE A ACTON, CA 93510	EXECUTIVE DIRECTOR 40.00	196,836.
KELLY FRISCIA 3720 SIERRA HWY STE A ACTON, CA 93510	DIRECTOR OF BUSINESS SERVI 40.00	134,432.
JOHN VESCOVO 3720 SIERRA HWY SUITE A ACTON, CA 93510	PRESIDENT 2.00	0.
CHERI BRADFORD 3720 SIERRA HWY SUITE A ACTON, CA 93510	SECRETARY 2.00	0.
KENCHY RAGSDALE 3720 SIERRA HWY STE A ACTON, CA 93510	TREASURER 2.00	0.
DR PATRICK HILL 3720 SIERRA HWY STE A ACTON, CA 93510	MEMBER 2.00	0.
KENNETH SCOTT 3720 SIERRA HWY STE A ACTON, CA 93510	MEMBER 2.00	0.
TOTAL TO FORM 199, PART II, LINE 11		563,662.

CA 199	OTHER EXPENSES	STATEMENT 3
DESCRIPTION		AMOUNT
INSTRUCTIONAL MATERIALS		8,070,660.
OPERATING EXPENSES		304,635.
PENSION PLAN CONTRIBUTIONS		2,246,464.
OTHER EMPLOYEE BENEFITS		1,210,347.
LEGAL FEES		352,541.
ACCOUNTING FEES		79,243.
OTHER PROFESSIONAL FEES		8,668,813.
ADVERTISING AND PROMOTION		10,741.
OFFICE EXPENSES		16,238.
INFORMATION TECHNOLOGY		477,829.
TRAVEL		13,819.
CONFERENCES AND CONVENTIONS		251,448.
INSURANCE		568,999.
TOTAL TO FORM 199, PART II, LINE 17		22,271,777.

CA 199	OTHER ASSETS	STATEMENT 4
DESCRIPTION	BEG. OF YEAR	END OF YEAR
PREPAID EXPENSES AND DEFERRED CHARGES	6,321.	11,090.
TOTAL TO FORM 199, SCHEDULE L, LINE 12	6,321.	11,090.

CA 199	OTHER LIABILITIES	STATEMENT 5
DESCRIPTION	BEG. OF YEAR	END OF YEAR
DEFERRED REVENUE	0.	1,285,805.
UNSECURED NOTES AND LOANS PAYABLE	3,194,612.	9,728,944.
TOTAL TO FORM 199, SCHEDULE L, LINE 18	3,194,612.	11,014,749.

CA 199	FUND BALANCES	STATEMENT 6
DESCRIPTION	BEG. OF YEAR	END OF YEAR
NET ASSETS WITHOUT DONOR RESTRICTIONS	1,758,549.	5,454,016.
TOTAL TO FORM 199, SCHEDULE L, LINE 21	1,758,549.	5,454,016.

TAXABLE YEAR  
**2020****California e-file Return Authorization for  
Exempt Organizations**FORM  
**8453-EO**

Exempt Organization name

Identifying number

**ILEAD CALIFORNIA CHARTERS 1****47-4286845****Part I Electronic Return Information** (whole dollars only)

<b>1</b>	Total gross receipts (Form 199, line 4)	<b>1</b>	<b>46,593,851</b>
<b>2</b>	Total gross income (Form 199, line 8)	<b>2</b>	<b>46,593,851</b>
<b>3</b>	Total expenses and disbursements (Form 199, line 9)	<b>3</b>	<b>42,898,384</b>

**Part II Settle Your Account Electronically for Taxable Year 2020**

<b>4</b>	<input type="checkbox"/> Electronic funds withdrawal	<b>4a</b>	Amount	<b>4b</b>	Withdrawal date (mm/dd/yyyy)
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**Part III Banking Information** (Have you verified the exempt organization's banking information?)

<b>5</b>	Routing number	
<b>6</b>	Account number	
<b>7</b>	Type of account:	<input type="checkbox"/> Checking <input type="checkbox"/> Savings

**Part IV Declaration of Officer**

I authorize the exempt organization's account to be settled as designated in Part II. If I check Part II, Box 4, I authorize an electronic funds withdrawal for the amount listed on line 4a.

Under penalties of perjury, I declare that I am an officer of the above exempt organization and that the information I provided to my electronic return originator (ERO), transmitter, or intermediate service provider and the amounts in Part I above agree with the amounts on the corresponding lines of the exempt organization's 2020 California electronic return. To the best of my knowledge and belief, the exempt organization's return is true, correct, and complete. If the exempt organization is filing a balance due return, I understand that if the Franchise Tax Board (FTB) does not receive full and timely payment of the exempt organization's fee liability, the exempt organization will remain liable for the fee liability and all applicable interest and penalties. I authorize the exempt organization return and accompanying schedules and statements be transmitted to the FTB by the ERO, transmitter, or intermediate service provider. **If the processing of the exempt organization's return or refund is delayed, I authorize the FTB to disclose to the ERO or intermediate service provider the reason(s) for the delay.**

**Sign  
Here**

Signature of officer

Date

**PRESIDENT**  
Title**Part V Declaration of Electronic Return Originator (ERO) and Paid Preparer.**

I declare that I have reviewed the above exempt organization's return and that the entries on form FTB 8453-EO are complete and correct to the best of my knowledge. (If I am only an intermediate service provider, I understand that I am not responsible for reviewing the exempt organization's return. I declare, however, that form FTB 8453-EO accurately reflects the data on the return.) I have obtained the organization officer's signature on form FTB 8453-EO before transmitting this return to the FTB; I have provided the organization officer with a copy of all forms and information that I will file with the FTB, and I have followed all other requirements described in FTB Pub. 1345, 2020 Handbook for Authorized e-file Providers. I will keep form FTB 8453-EO on file for **four** years from the due date of the return or **four** years from the date the exempt organization return is filed, whichever is later, and I will make a copy available to the FTB upon request. If I am also the paid preparer, under penalties of perjury, I declare that I have examined the above exempt organization's return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. I make this declaration based on all information of which I have knowledge.

<b>ERO</b>	ERO's signature	<b>WADE MCMULLEN</b>	Date	Check if also paid preparer	<input checked="" type="checkbox"/>	Check if self-employed	<input type="checkbox"/>	ERO's PTIN	<b>P00541671</b>
<b>Must Sign</b>	Firm's name (or yours if self-employed) and address	<b>CLIFTONLARSONALLEN LLP</b> <b>2210 EAST ROUTE 66</b> <b>GLENORA, CA</b>						Firm's FEIN	<b>41-0746749</b>
								ZIP code	<b>91740</b>

Under penalties of perjury, I declare that I have examined the above organization's return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. I make this declaration based on all information of which I have knowledge.

<b>Paid Preparer</b>	Paid preparer's signature		Date	Check if self-employed	<input type="checkbox"/>	Paid preparer's PTIN	
<b>Must Sign</b>	Firm's name (or yours if self-employed) and address					Firm's FEIN	
						ZIP code	





**CliftonLarsonAllen LLP**

2210 East Route 66  
Glendora, CA 91740

**phone** 626.857.7300 **fax** 626.857.7302  
**CLAconnect.com**

June 16, 2022

Board of Directors and Management  
iLEAD California Charters 1  
3720 Sierra Hwy Ste A  
Acton, CA 93510

Dear Members of the Board and Management:

We are pleased to confirm our understanding of the terms and objectives of our engagement and the nature and limitations of the audit and nonaudit services CliftonLarsonAllen LLP ("CLA," "we," "us," and "our") will provide for iLEAD California Charters 1 ("you," "your," "the entity", or "the Organization") for the year ended June 30, 2022.

Marlen Gomez is responsible for the performance of the audit engagement. Per Education Code Section 41020(f)(2), there is a limit of six consecutive year for any firm where the principal of the audit and the reviewing principal have been the same in each of those years. This is the first year Marlen Gomez will be the engagement principal.

### **Scope of audit services**

We will audit the financial statements of the Organization, which comprise the statement of financial position as of June 30, 2022, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

We will also evaluate and report on the presentation of the supplementary information accompanying the financial statements in relation to the financial statements as a whole.

### **Nonaudit services**

We will also provide the following nonaudit services:

- Preparation of your financial statements and related notes.
- Preparation of adjusting journal entries.
- Preparation of the informational tax return.

### **Audit objectives**

The objectives of our audit are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditors' report that includes our opinion about whether your financial statements are fairly presented, in all material respects, in conformity with accounting principles generally accepted in the United States of



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America (U.S. GAAP). Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with auditing standards generally accepted in the United States of America (U.S. GAAS) will always detect a material misstatement when it exists. Misstatements, including omissions, can arise from fraud or error and are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

Our audit will be conducted in accordance with auditing standards generally accepted in the United States of America (U.S. GAAS), the standards for financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States, and the *2021-2022 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, published by the Education Audit Appeals Panel. Those standards require us to be independent of the entity and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. Our audit will include tests of your accounting records and other procedures we consider necessary to enable us to express such an opinion. We will also perform procedures to enable us to express an opinion on whether the supplementary information (as identified above) accompanying the financial statements is fairly stated, in all material respects, in relation to the financial statements as a whole.

We will issue a written report upon completion of our audit of your financial statements. Circumstances may arise in which our report may differ from its expected form and content based on the results of our audit. Depending on the nature of these circumstances, it may be necessary for us to modify our opinion, add an emphasis-of-matter or other-matter paragraph to our auditors' report, or if necessary, withdraw from the engagement. If our opinion on the financial statements is other than unmodified, we will discuss the reasons with you in advance. If circumstances occur related to the condition of your records, the availability of sufficient, appropriate audit evidence, or the existence of a significant risk of material misstatement of the financial statements caused by error, fraudulent financial reporting, or misappropriation of assets, which in our professional judgment prevent us from completing the audit or forming an opinion on the financial statements, we retain the right to take any course of action permitted by professional standards, including declining to express an opinion or issue a report, or withdrawing from the engagement.

We will also provide a report (which does not include an opinion) on internal control related to the financial statements and on compliance with the provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a material effect on the financial statements, as required by *Government Auditing Standards*. The report on internal control over financial reporting and on compliance and other matters will include a paragraph that states (1) that the purpose of the report is solely to describe the scope of our testing of internal control and compliance and the result of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance, and (2) that the report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. The paragraph will also state that the report is not suitable for any other purpose. If during our audit we become aware that the entity is subject to an audit requirement that is not encompassed in the terms of this engagement, we will communicate to management and those charged with governance that an audit conducted in accordance with U.S. GAAS and the standards for financial audits contained in *Government Auditing Standards* may not satisfy the relevant legal, regulatory, or contractual requirements.

We also will issue a written report and opinion on State Compliance upon completion of our audit.

### **Auditor responsibilities, procedures, and limitations**

We will conduct our audit in accordance with U.S. GAAS and the standards for financial audits contained in *Government Auditing Standards*. Those standards require that we exercise professional judgment and maintain professional skepticism throughout the planning and performance of the audit. As part of our audit, we will:

- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. However, we will communicate to you in writing any significant deficiencies or material weaknesses in internal control relevant to the audit of the financial statements that we have identified during the audit.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements, including the amounts and disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.
- Conclude, based on the audit evidence obtained, whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the entity's ability to continue as a going concern for a reasonable period of time.

There is an unavoidable risk, because of the inherent limitations of an audit, together with the inherent limitations of internal control, that some material misstatements may not be detected, even though the audit is properly planned and performed in accordance with U.S. GAAS and *Government Auditing Standards*. Because we will not perform a detailed examination of all transactions, material misstatements, whether from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets, or (4) violations of laws or governmental regulations that are attributable to the entity or to acts by management or employees acting on behalf of the entity, may not be detected. Because the determination of waste and abuse is subjective, *Government Auditing Standards* do not require auditors to perform specific procedures to detect waste or abuse in financial audits nor do they expect auditors to provide reasonable assurance of detecting waste or abuse.

In addition, an audit is not designed to detect immaterial misstatements or violations of laws or governmental regulations that do not have a direct and material effect on the financial statements. However, we will inform the appropriate level of management and those charged with governance of any material errors, fraudulent financial reporting, or misappropriation of assets that come to our attention. We will also inform the appropriate level of management and those charged with governance of any violations of laws or governmental regulations that come to our attention, unless clearly inconsequential, and of any material abuse that comes to our attention.

Tests of controls may be performed to test the effectiveness of certain controls that we consider relevant to preventing and detecting fraud or errors that are material to the financial statements and to preventing and detecting misstatements resulting from noncompliance with provisions of laws, regulations, contracts, and grant agreements that have a material effect on the financial statements. Our tests, if performed, will be less in scope than would be necessary to render an opinion on internal control and, accordingly, no opinion will be expressed in our report on internal control issued pursuant to *Government Auditing Standards*. An audit is not designed to provide assurance on internal control or to identify deficiencies, significant deficiencies, or material weaknesses in internal control. However, we will communicate to you in writing significant deficiencies or material weaknesses in internal control relevant to the audit of the financial statements that we identify during the audit that are required to be communicated under AICPA professional standards and *Government Auditing Standards*.

As part of obtaining reasonable assurance about whether the financial statements are free of material misstatement, we will perform tests of the entity's compliance with the provisions of laws, regulations, contracts, and grant agreements that have a material effect on the financial statements. However, the objective of our audit will not be to provide an opinion on overall compliance and we will not express such an opinion in our report on compliance issued pursuant to *Government Auditing Standards*.

We will include in our report on internal control over financial reporting and on compliance relevant information about any identified or suspected instances of fraud and any identified or suspected noncompliance with provisions of laws, regulations, contracts, or grant agreements that may have occurred that are required to be communicated under *Government Auditing Standards*.

Our responsibility as auditors is limited to the period covered by our audit and does not extend to any later periods for which we are not engaged as auditors.

### **Management responsibilities**

Our audit will be conducted on the basis that you (management and, when appropriate, those charged with governance) acknowledge and understand that you have certain responsibilities that are fundamental to the conduct of an audit.

You are responsible for the preparation and fair presentation of the financial statements in accordance with U.S. GAAP. Management's responsibilities include the selection and application of accounting principles; recording and reflecting all transactions in the financial statements; determining the reasonableness of significant accounting estimates included in the financial statements; adjusting the financial statements to correct material misstatements; and confirming to us in the management representation letter that the effects of any uncorrected misstatements aggregated by us during the current engagement and pertaining to the latest period presented are immaterial, both individually and in the aggregate, to the financial statements taken as a whole. In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the entity's ability to continue as a going concern for one year after the date the financial statements are available to be issued.

You are responsible for the design, implementation, and maintenance of effective internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error, including evaluating and monitoring ongoing activities and safeguarding assets to help ensure that appropriate goals and objectives are met. You are responsible for

the design, implementation, and maintenance of internal controls to prevent and detect fraud; assessing the risk that the financial statements may be materially misstated as a result of fraud; and for informing us about all known or suspected fraud affecting the entity involving (1) management, (2) employees who have significant roles in internal control, and (3) others where the fraud could have a material effect on the financial statements. Your responsibilities include informing us of your knowledge of any allegations of fraud or suspected fraud affecting the entity received in communications from employees, former employees, grantors, regulators, or others. In addition, you are responsible for implementing systems designed to achieve compliance with applicable laws and regulations and the provisions of contracts and grant agreements; identifying and ensuring that the entity complies with applicable laws, regulations, contracts, and grant agreements; and informing us of all instances of identified or suspected noncompliance whose effects on the financial statements should be considered. You are responsible for taking timely and appropriate steps to remedy any fraud and noncompliance with provisions of laws, regulations, contracts, and grant agreements that we may report.

You are responsible for providing us with (1) access to all information of which you are aware that is relevant to the preparation and fair presentation of the financial statements, including amounts and disclosures, such as records, documentation, identification of all related parties and all related-party relationships and transactions, and other matters, and for the accuracy and completeness of that information (including information from within and outside of the general and subsidiary ledgers), and for ensuring management information and financial information is reliable and properly reported; (2) additional information that we may request for the purpose of the audit; and (3) unrestricted access to persons within the entity from whom we determine it necessary to obtain audit evidence. You agree to inform us of events occurring or facts discovered subsequent to the date of the financial statements that may affect the financial statements.

Management is responsible for the preparation of the supplementary information in accordance with U.S. GAAP. You agree to include our report on the supplementary information in any document that contains, and indicates that we have reported on, the supplementary information. You also agree to include the audited financial statements with any presentation of the supplementary information that includes our report thereon or make the audited financial statements readily available to users of the supplementary information no later than the date the supplementary information is issued with our report thereon. You agree to provide us written representations related to the presentation of the supplementary information.

Management is responsible for providing us with a written confirmation concerning representations made by you and your staff to us in connection with the audit. During our engagement, we will request information and explanations from you regarding, among other matters, the entity's activities, internal control, future plans, specific transactions, and accounting systems and procedures. The procedures we will perform during our engagement and the conclusions we reach as a basis for our report will be heavily influenced by the representations that we receive in the representation letter and otherwise from you. Accordingly, inaccurate, incomplete, or false representations could cause us to expend unnecessary effort or could cause a material fraud or error to go undetected by our procedures. In view of the foregoing, you agree that we shall not be responsible for any misstatements in the entity's financial statements that we may fail to detect as a result of misrepresentations made to us by you.

Management is responsible for establishing and maintaining a process for tracking the status of audit findings and recommendations. Management is also responsible for identifying for us previous financial

audits, attestation engagements, performance audits, or other studies related to the objectives discussed in the “Audit objectives” section of this letter. This responsibility includes relaying to us corrective actions taken to address significant findings and recommendations resulting from those audits, attestation engagements, performance audits, or other engagements or studies. You are also responsible for providing management’s views on our current findings, conclusions, and recommendations, as well as your planned corrective actions for the report, and for the timing and format for providing that information.

### **Responsibilities and limitations related to nonaudit services**

For all nonaudit services we may provide to you, management agrees to assume all management responsibilities; oversee the services by designating an individual, preferably within senior management, who possesses suitable skill, knowledge, and/or experience to understand and oversee the services; evaluate the adequacy and results of the services; and accept responsibility for the results of the services. Management is also responsible for ensuring that your data and records are complete and that you have received sufficient information to oversee the services.

The responsibilities and limitations related to the nonaudit services performed as part of this engagement are as follows:

- We will prepare a draft of your financial statements and related notes. Since the preparation and fair presentation of the financial statements is your responsibility, you will be required to acknowledge in the representation letter our assistance with preparation of the financial statements and that you have reviewed and approved the financial statements and related notes prior to their issuance and have accepted responsibility for those financial statements. You have a responsibility to be in a position in fact and appearance to make an informed judgment on those financial statements.
- We will prepare a draft of your supplementary information. Since the preparation of the supplementary information in accordance with the applicable criteria is your responsibility, you will be required to review, approve, and accept responsibility for the supplementary information prior to its issuance and have a responsibility to be in a position in fact and appearance to make an informed judgment on the supplementary information.
- We will propose adjusting journal entries as needed. You will be required to review and approve those entries and to understand the nature of the changes and their impact on the financial statements.
- We will prepare the organization’s federal Form 990 and applicable state filings in accordance with the applicable tax laws. We will use our judgment in resolving questions where the law is unclear, and where there is reasonable authority, we will resolve questions in your favor whenever possible. We will not audit or independently verify the accuracy or completeness of the information we receive from you for the preparation of the returns and filings, and our engagement cannot be relied upon to uncover errors or irregularities in the underlying information.

These nonaudit services do not constitute an audit under *Government Auditing Standards* and such services will not be conducted in accordance with *Government Auditing Standards*.

## **Use of financial statements**

The financial statements and our report thereon are for management's use. If you intend to reproduce and publish the financial statements and our report thereon, they must be reproduced in their entirety. Inclusion of the audited financial statements in a document, such as an annual report or an offering document, should be done only with our prior approval of the document. You are responsible to provide us the opportunity to review such documents before issuance.

If the parties (i.e., you and CLA) agree that CLA will not be involved with your official statements related to municipal securities filings or other offering documents, we will require that any official statements or other offering documents issued by you with which we are not involved clearly indicate that CLA is not involved with the contents of such documents. Such disclosure should read as follows:

CliftonLarsonAllen LLP, our independent auditor, has not been engaged to perform and has not performed, since the date of its report included herein, any procedures on the financial statements addressed in that report. CliftonLarsonAllen LLP also has not performed any procedures relating to this offering document.

With regard to the electronic dissemination of audited financial statements, including financial statements published electronically on your website or submitted on a regulator website, you understand that electronic sites are a means to distribute information and, therefore, we are not required to read the information contained in those sites or to consider the consistency of other information in the electronic site with the original document.

We may issue preliminary draft financial statements to you for your review. Any preliminary draft financial statements should not be relied on or distributed.

## **Engagement administration and other matters**

We expect to begin our audit in July 2022.

We understand that your employees will prepare all confirmations, account analyses, and audit schedules we request and will locate any documents or invoices selected by us for testing. A list of information we expect to need for our audit and the dates required will be provided in a separate communication.

We will provide copies of our reports to the entity; however, management is responsible for distribution of the reports and the financial statements. Unless restricted by law or regulation, or containing privileged and confidential information, copies of our reports are to be made available for public inspection.

We are available to perform additional procedures with regard to fraud detection and prevention, at your request, as a separate engagement, subject to completion of our normal engagement acceptance procedures. The terms and fees of such an engagement would be documented in a separate engagement letter.

The audit documentation for this engagement is the sole and exclusive property of CLA and constitutes confidential and proprietary information. However, subject to applicable laws and regulations, audit documentation and appropriate individuals will be made available upon request and in a timely manner to the regulator or its designee, a federal agency providing direct or indirect funding, or the U.S. Government Accountability Office for purposes of a quality review of the audit, to resolve audit findings, or to carry out oversight responsibilities. We will notify you of any such request. If requested, access to

such audit documentation will be provided under the supervision of CLA personnel. Furthermore, upon request, we may provide copies of selected audit documentation to the aforementioned parties. These parties may intend, or decide, to distribute the copies or information contained therein to others, including other governmental agencies.

The audit documentation for this engagement will be retained for a minimum of seven years after the report release date or for any additional period requested by the regulator. If we are aware that a federal awarding agency, pass-through entity, or auditee is contesting an audit finding, we will contact the party(ies) contesting the audit finding for guidance prior to destroying the audit documentation.

Except as permitted by the "Consent" section of this agreement, CLA will not disclose any confidential, proprietary, or privileged information of the entity to any persons without the authorization of entity management or unless required by law. This confidentiality provision does not prohibit us from disclosing your information to one or more of our affiliated companies in order to provide services that you have requested from us or from any such affiliated company. Any such affiliated company shall be subject to the same restrictions on the use and disclosure of your information as apply to us.

Professional standards require us to be independent with respect to you in the performance of these services. Any discussion that you have with our personnel regarding potential employment with you could impair our independence with respect to this engagement. Therefore, we request that you inform us prior to any such discussions so that we can implement appropriate safeguards to maintain our independence and objectivity. Further, any employment offers to any staff members working on this engagement without our prior knowledge may require substantial additional procedures to ensure our independence. You will be responsible for any additional costs incurred to perform these procedures.

Our relationship with you is limited to that described in this letter. As such, you understand and agree that we are acting solely as independent accountants. We are not acting in any way as a fiduciary or assuming any fiduciary responsibilities for you. We are not responsible for the preparation of any report to any governmental agency, or any other form, return, or report or for providing advice or any other service not specifically recited in this letter.

Our engagement and responsibility end on delivery of our signed report. Any additional services that might be requested will be a separate, new engagement. The terms and conditions of that new engagement will be governed by a new, specific engagement letter for that service.

*Government Auditing Standards* require that we make our most recent external peer review report publicly available. The report is posted on our website at [www.CLAconnect.com/Aboutus/](http://www.CLAconnect.com/Aboutus/).

## **Mediation**

Any disagreement, controversy, or claim ("Dispute") that may arise out of any aspect of our services or relationship with you, including this engagement, shall be submitted to non-binding mediation by written notice ("Mediation Notice") to the other party. In mediation, we will work with you to resolve any differences voluntarily with the aid of an impartial mediator.

The mediation will be conducted as specified by the mediator and agreed upon by the parties. The parties agree to discuss their differences in good faith and to attempt, with the assistance of the mediator, to reach an amicable resolution of the Dispute.



Each party will bear its own costs in the mediation. The fees and expenses of the mediator will be shared equally by the parties.

Any Dispute will be governed by the laws of the state of Minnesota, without giving effect to choice of law principles.

#### Time limitation

The nature of our services makes it difficult, with the passage of time, to gather and present evidence that fully and fairly establishes the facts underlying any Dispute that may arise between the parties. The parties agree that, notwithstanding any statute or law of limitations that might otherwise apply to a Dispute, including one arising out of this agreement or the services performed under this agreement, for breach of contract or fiduciary duty, tort, fraud, misrepresentation or any other cause of action or remedy, any action or legal proceeding by you against us must be commenced within twenty-four (24) months ("Limitation Period") after the date when we deliver our final audit report under this agreement to you, regardless of whether we do other services for you relating to the audit report, or you shall be forever barred from commencing a lawsuit or obtaining any legal or equitable relief or recovery.

The Limitation Period applies and begins to run even if you have not suffered any damage or loss, or have not become aware of the existence or possible existence of a Dispute.

#### Estimate Fees

Our professional fees will be billed based on the time involved and the degree of responsibility and skills required. We will also bill for expenses (including internal and administrative charges) plus a technology and client support fee of five percent (5%) of all professional fees billed. Based on our preliminary estimates, the price for the engagement is as follows:

Professional Services		Amount
Audit services*	\$	10,800
Informational tax return services	\$	2,200
Technology and client support fee	\$	650
<b>Total</b>	<b>\$</b>	<b>13,650</b>
* Should Federal Expenditures exceed \$750,000, a change in scope and fee will be required.		

Additional state compliance procedures related to changes to the *2021-2022 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, published by the Education Audit Appeals Panel will be billed as out-of-scope. This includes independent study testing requirements if the threshold for testing is met.

The estimated fees are based on anticipated cooperation from your personnel and their assistance with preparing confirmations and requested schedules. If the requested items are not available on the dates required or are not accurate, the estimated price for services will likely be higher. If unexpected circumstances require significant additional time, we will advise you before undertaking work that would require a substantial increase in the fee estimate. Our invoices for our services will be rendered each month as work progresses and are payable on presentation. In accordance with our firm policies, work may be suspended if your account becomes 60 days or more overdue and will not be resumed until your account is paid in full. If we elect to terminate our services for nonpayment, our engagement will be deemed to have been completed even if we have not issued our reports. You will be obligated to compensate us for all time expended and to reimburse us for all out-of-pocket expenditures through the date of termination. There is a ten percent withholding clause per Education Code 14505.

### ***Unanticipated services***

We do not anticipate encountering the need to perform additional services beyond those described in this letter. Below are listings of services considered to be outside the scope of our engagement. If any such service needs to be completed before the audit can proceed in an efficient manner, we will determine whether we can provide the service and maintain our independence. If appropriate, we will notify you and provide a fair and reasonable price for providing the service. We will bill you for the service at periodic dates after the additional service has been performed.

#### **Bookkeeping services**

Bookkeeping services are not audit services. Bookkeeping services include the following activities:

- Preparation of a trial balance
- Account reconciliations
- Bank statement reconciliations
- Capital asset accounting (e.g., calculating depreciation, identify capital assets for additions and deletions)
- Calculating accruals
- Analyzing transactions for proper recording
- Converting cash basis accounting records to accrual basis
- Assisting in calculating tax provisions
- Preparation of financial statements and the related notes to the financial statements
- Processing immaterial adjustments through the financial statements
- Adjusting the financial statements for new activities and new disclosures

**Additional work resulting from unanticipated changes in your organization or accounting records**

If your organization undergoes significant changes in key personnel, accounting systems, and/or internal control, we are required to update our audit documentation and audit plan. The following are examples of situations that will require additional audit work:

- Revising documentation of your internal control for changes resulting from your implementation of new information systems
- Deterioration in the quality of the entity's accounting records during the current-year engagement in comparison to the prior-year engagement
- Significant new accounting issues
- Significant changes in your volume of business
- Mergers, acquisitions, or other business combinations
- New or unusual transactions
- Changes in audit scope or requirements resulting from changes in your activities
- Erroneous or incomplete accounting records
- Evidence of material weaknesses or significant deficiencies in internal control
- Substantial increases in the number or significance of problem loans
- Regulatory examination matters
- Implementation or adoption of new or existing accounting, reporting, regulatory, or tax requirements
- New financial statement disclosures

#### **Changes in engagement timing and assistance by your personnel**

The fee estimate is based on anticipated cooperation from your personnel and their assistance with timely preparation of confirmations and requested schedules. If the requested items are not available on the dates required or are not accurate, we will advise management. Additional time and costs may be necessary because of such unanticipated delays. Examples of situations that may cause our estimated fee to increase include:

- Significant delays in responding to our requests for information such as reconciling variances or providing requested supporting documentation (e.g., invoices, contracts, and other documents)
- Rescheduling our fieldwork
- Schedule disruption caused by litigation, financial challenges (going concern), loan covenants (waivers), etc.

- Identifying a significant number of proposed audit adjustments
- Schedules prepared by your personnel that do not reconcile to the general ledger
- Numerous revisions to information and schedules provided by your personnel
- Restating financial statements for accounting errors in the prior year
- Lack of availability of entity personnel during audit fieldwork

***Changes in accounting and audit standards***

Standard setters and regulators continue to evaluate and modify standards. Such changes may result in new or revised financial reporting and disclosure requirements or expand the nature, timing, and scope of the activities we are required to perform. To the extent that the amount of time required to provide the services described in the letter increases due to such changes, our fee may need to be adjusted. We will discuss such circumstances with you prior to performing the additional work.

***Changes related to COVID-19***

COVID-19 continues to have significant direct and indirect impacts on financial reporting, disclosure requirements, and the nature, timing, and scope of the activities we are required to perform. To the extent that the amount of time required to provide the services described in this letter increases due to such changes, our fee may need to be adjusted. We will discuss such circumstances with you prior to performing the additional work.

***Other fees***

You also agree to compensate us for any time and expenses, including time and expenses of legal counsel, we may incur in responding to discovery requests or participating as a witness or otherwise in any legal, regulatory, or other proceedings that we are asked to respond to on your behalf.

***Finance charges and collection expenses***

You agree that if any statement is not paid within 30 days from its billing date, the unpaid balance shall accrue interest at the monthly rate of one and one-quarter percent (1.25%), which is an annual percentage rate of 15%. In the event that any collection action is required to collect unpaid balances due us, reasonable attorney fees and expenses shall be recoverable.

***Consent***

***Consent to use information for benchmarking analysis***

In an effort to better serve the needs of our clients, we develop a variety of benchmark, performance indicator, and predictive analysis reports, using anonymized client data obtained from our audit, tax, and other engagements. Business and financial information that you provide to us may be combined with information from other clients and included within the aggregated data that we use in these reports. While some of these analytical reports will be published and released publicly, please be assured that the separate information that we obtain from you will remain confidential, as required by the AICPA Code of Professional Conduct.

***Subcontractors***

CLA may, at times, use subcontractors to perform services under this agreement, and they may have access to your information and records. Any such subcontractors will be subject to the same restrictions on the use of such information and records as apply to CLA under this agreement.

**Agreement**

We appreciate the opportunity to be of service to you and believe this letter accurately summarizes the significant terms of our engagement. This letter constitutes the entire agreement regarding these services and supersedes all prior agreements (whether oral or written), understandings, negotiations, and discussions between you and CLA. If you have any questions, please let us know. Please sign and date this letter to indicate your acknowledgment and understanding of, and agreement with, the arrangements for our audit of your financial statements including the terms of our engagement and the parties' respective responsibilities.

Sincerely,

**CliftonLarsonAllen LLP**

Marlen Gomez, CPA  
Principal  
626-857-7300  
Marlen.gomez@CLAconnect.com

**Response:**

This letter correctly sets forth the understanding of iLEAD California Charters 1.

Authorized management signature: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

# **iLEAD California Charters 1 D/B/A iLEAD Hybrid**

## **RESOLUTION REGARDING THE EDUCATION PROTECTION ACCOUNT**

WHEREAS, the voters approved Proposition 30 on November 6, 2012;

WHEREAS, Proposition 30 added Article XIII, Section 36 to the California Constitution effective November 7, 2012;

WHEREAS, the provisions of Article XIII, Section 36(e) create in the state General Fund an Education Protection Account to receive and disburse the revenues derived from the incremental increases in taxes imposed by Article XIII, Section 36(f);

WHEREAS, before June 30th of each year, the Director of Finance shall estimate the total amount of additional revenues, less refunds that will be derived from the incremental increases in tax rates made pursuant to Article XIII, Section 36(f) that will be available for transfer into the Education Protection Account during the next fiscal year;

WHEREAS, if the sum determined by the State Controller is positive, the State Controller shall transfer the amount calculated into the Education Protection Account within ten days preceding the end of the fiscal year;

WHEREAS, all monies in the Education Protection Account are hereby continuously appropriated for the support of school districts, county offices of education, charter schools and community college districts;

WHEREAS, monies deposited in the Education Protection Account shall not be used to pay any costs incurred by the Legislature, the Governor or any agency of state government;

WHEREAS, a community college district, county office of education, school district, or charter school shall have the sole authority to determine how the monies received from the Education Protection Account are spent in the school or schools within its jurisdiction;

WHEREAS, the governing board of the district shall make the spending determinations with respect to monies received from the Education Protection Account in open session of a public meeting of the governing board;

WHEREAS, the monies received from the Education Protection Account shall not be used for salaries or benefits for administrators or any other administrative cost;

WHEREAS, each community college district, county office of education, school district and charter school shall annually publish on its Internet website an accounting of how much money was received from the Education Protection Account and how that money was spent;

WHEREAS, the annual independent financial and compliance audit required of community college districts, county offices of education, school districts and charter schools shall ascertain and verify whether the funds provided from the Education Protection Account have been properly disbursed and expended as required by Article XIII, Section 36 of the California Constitution;

WHEREAS, expenses incurred by community college districts, county offices of education, school districts and charter schools to comply with the additional audit requirements of Article XIII, Section 36 may be paid with funding from the Education Protection Act and shall not be considered administrative costs for purposes of Article XIII, Section 36.

NOW, THEREFORE, IT IS HEREBY RESOLVED:

1. The monies received from the Education Protection Account shall be spent as required by Article XIII, Section 36 and the spending determinations on how the money will be spent shall be made in open session of a public meeting of the governing board of iLEAD California Charters 1 D/B/A iLEAD Hybrid;
2. In compliance with Article XIII, Section 36(e), with the California Constitution, the governing board of the iLEAD California Charters 1 D/B/A iLEAD Hybrid has determined to spend the monies received from the Education Protection Act as attached.

DATED: \_\_\_\_\_

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Board Member Signature

iLEAD California Charters 1 D/B/A iLEAD Hybrid

3720 Sierra Hwy Unit A

Acton, CA 93510

<b>Education Protection Account Budget Object Codes: 2022/2023</b> {Funding will be used for expenses in the primary Object Code listed below, and if there is a balance the funding will be applied to the secondary Object Codes, whichever is applicable}		
Primary Object code for EPA Funding	1100	Certificated Teachers
Secondary Object Code for EPA Funding	2970	Classified Substitute & Intern Teachers
Secondary Object Code for EPA Funding	2980	Classified Intern Teachers
<b>EPA Estimated Funding Determination for 2022/2023   \$765,828</b>		



**CHARTER SCHOOL PRELIMINARY BUDGET  
FINANCIAL REPORT -- ALTERNATIVE FORM**  
**July 1, 2022 to June 30, 2023**

**Charter School Certification**

Charter School Name:	ilead Hybrid
CDS #:	19 75309 0131987
Charter Approving Entity:	Acton-Agua Dulce Unified School Dsitrict
County:	Los Angeles
Charter #:	0602482

For information regarding this report, please contact:

For Approving Entity:

Name

Title

Telephone

E-mail address

For Charter School:

iLEAD Hybrid

Name

Amanda Fisher

Title

Executive Director

Telephone

[661-904-2481](tel:661-904-2481)

E-mail address

[amanda.fisher@ileaschools.org](mailto:amanda.fisher@ileaschools.org)

To the entity that approved the charter school:

☒ ) 2022-23 CHARTER SCHOOL PRELIMINARY BUDGET FINANCIAL REPORT -- ALTERNATIVE FORM: This report has been approved, and is hereby filed by the charter school pursuant to *Education Code* Section 42100(b).

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

Charter School Official  
(Original signature required)

Printed

Name: \_\_\_\_\_

Title: \_\_\_\_\_

To the Acton-Agua Dulce Unified School District

☒ ) 2022-23 CHARTER SCHOOL PRELIMINARY BUDGET FINANCIAL REPORT -- ALTERNATIVE FORM: This report is hereby filed with the County Superintendent pursuant to *Education Code* Section 42100(a).

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

Authorized Representative of  
Charter Approving Entity  
(Original signature required)

Printed

Name: \_\_\_\_\_

Title: \_\_\_\_\_

To the Superintendent of Public Instruction:

☒ ) 2022-23 CHARTER SCHOOL PRELIMINARY BUDGET FINANCIAL REPORT -- ALTERNATIVE FORM: This report verified for mathematical accuracy by the County Superintendent of Schools pursuant to *Education Code* Section 42100(a).

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

County Superintendent/Designee  
(Original signature required)

**CHARTER SCHOOL PRELIMINARY BUDGET  
FINANCIAL REPORT -- ALTERNATIVE FORM**

July 1, 2022 to June 30, 2023

Charter School Name: iLEAD Hybrid  
CDS #: 19 75309 0131987  
Charter Approving Entity: Acton-Aqua Dulce Unified School District  
County: Los Angeles  
Charter #: 060248

**This charter school uses the following basis of accounting:**

**Please enter an "X" in the applicable box below; check only one box**

☐ **Accrual Basis** (Applicable Capital Assets/Interest on Long-Term Debt/Long-Term Liabilities objects are 6900, 7438, 9400-9499, and 9660-9669)  
☒ **Modified Accrual Basis** (Applicable Capital Outlay/Debt Service objects are 6100-6170, 6200-6500, 7438, and 7439)

Description	Object Code	2021-22 Estimated Actuals (A)	2022-23 Preliminary Budget Unrestricted (B)	2022-23 Preliminary Budget Restricted (C)	2022-23 Preliminary Budget Total (D)	Difference (Col A & D)
<b>A. REVENUES</b>						
1. LCFF Sources						
State Aid - Current Year	8011	34,593,348	36,046,836		36,046,836	1,453,488
Education Protection Account - Current Year	8012	766,012	765,828		765,828	(184)
State Aid - Prior Years	8019	0			0	0
Transfer of Charter Schools in Lieu of Property Taxes	8096	2,062,985	2,165,072		2,165,072	102,087
Other LCFF Transfers	8091, 8097	0	0		0	0
<b>Total, LCFF Sources</b>		<b>37,422,345</b>	<b>38,977,736</b>		<b>38,977,736</b>	<b>1,555,391</b>
2. Federal Revenues (see NOTE on last page)						
No Child Left Behind	8290	0		0	0	0
Special Education - Federal	8181, 8182	455,933		495,875	495,875	39,942
Child Nutrition - Federal	8220	53,528		57,575	57,575	4,047
Other Federal Revenues	8290	490,237	0	2,755,409	2,755,409	2,265,172
<b>Total, Federal Revenues</b>		<b>999,698</b>	<b>0</b>	<b>3,308,859</b>	<b>3,308,859</b>	<b>2,309,161</b>
3. Other State Revenues						
Special Education - State	StateRevSE	2,669,299		3,035,525	3,035,525	366,226
Child Nutrition Programs	8520	2,321		2,995	2,995	674
Mandated Costs Reimbursements	8550	153,634	89,282		89,282	(64,352)
Lottery - Unrestricted and Instructional Materials	8560	762,170	873,254		873,254	111,084
Low Performing Student Block Grant	8590	11,592	960,274	0	960,274	948,682
All Other State Revenues	StateRevAO	0	0	0	0	0
<b>Total, Other State Revenues</b>		<b>3,599,016</b>	<b>1,922,810</b>	<b>3,038,520</b>	<b>4,961,330</b>	<b>1,362,314</b>
4. Other Local Revenues						

Transfers from Sponsoring LEAs to Charter Schools	8791	0	0		0	0
All Other Local Revenues	LocalRevAO	2,306,729	5,000	0	5,000	(2,301,729)
<b>Total, Local Revenues</b>		<b>2,306,729</b>	<b>5,000</b>	<b>0</b>	<b>5,000</b>	<b>(2,301,729)</b>
<b>5. TOTAL REVENUES</b>		<b>44,327,788</b>	<b>40,905,546</b>	<b>6,347,379</b>	<b>47,252,925</b>	<b>2,925,137</b>
<b>B. EXPENDITURES</b>						
1. Certificated Salaries						
Teachers' Salaries	1100	13,360,828	10,195,578	3,934,605	14,130,183	769,355
Certificated Pupil Support Salaries	1200	385,018	213,963	320,566	534,529	149,511
Certificated Supervisors' and Administrators' Salaries	1300	457,677	398,535	0	398,535	(59,142)
Other Certificated Salaries	1900	0	214,302	113,387	327,689	327,689
<b>Total, Certificated Salaries</b>		<b>14,203,523</b>	<b>11,022,378</b>	<b>4,368,558</b>	<b>15,390,936</b>	<b>1,187,413</b>
2. Non-certificated Salaries						
Instructional Aides' Salaries	2100	515,270	556,537	209,970	766,507	251,237
Non-certificated Support Salaries	2200	201,894	75,000	92,559	167,559	(34,335)
Non-certificated Supervisors' and Administrators' Sal.	2300	0	0	0	0	0
Clerical and Office Salaries	2400	1,008,751	965,435	101,550	1,066,985	58,234
Other Non-certificated Salaries	2900	156,258	158,976	0	158,976	2,718
<b>Total, Non-certificated Salaries</b>		<b>1,882,173</b>	<b>1,755,948</b>	<b>404,079</b>	<b>2,160,027</b>	<b>277,854</b>

Description	Object Code	2021-22 Estimated Actuals (A)	2022-23 Preliminary Budget Unrestricted (B)	2022-23 Preliminary Budget Restricted (C)	2022-23 Preliminary Budget Total (D)	Difference (Col A & D)
3. Employee Benefits						
STRS	3101-3102	2,364,130	2,348,881	590,788	2,939,669	575,539
PERS	3201-3202	0	0	0	0	0
OASDI / Medicare / Alternative	3301-3302	321,458	266,075	112,130	378,205	56,747
Health and Welfare Benefits	3401-3402	1,038,711	1,966,677	121,266	2,087,943	1,049,232
Unemployment Insurance	3501-3502	106,843	111,370	6,510	117,880	11,037
Workers' Compensation Insurance	3601-3602	168,143	447,736	0	447,736	279,593
Retiree Benefits	3701-3702	10,000	102,683	0	102,683	92,683
PERS Reduction (for revenue limit funded schools)	3801-3802	0	0	0	0	0
Other Employee Benefits	3901-3902	0	0	0	0	0
<b>Total, Employee Benefits</b>		<b>4,009,285</b>	<b>5,243,423</b>	<b>830,693</b>	<b>6,074,116</b>	<b>2,064,831</b>
4. Books and Supplies						
Approved Textbooks and Core Curricula Materials	4100	259,409	250,693	40,000	290,693	31,284
Books and Other Reference Materials	4200	486	0	403	403	(83)
Materials and Supplies	4300	8,341,001	9,001,414	938,176	9,939,590	1,598,589
Noncapitalized Equipment	4400	266,757	5,240	329,949	335,189	68,432
Food	4700	54,772	604	59,020	59,624	4,852
<b>Total, Books and Supplies</b>		<b>8,922,425</b>	<b>9,257,951</b>	<b>1,367,548</b>	<b>10,625,499</b>	<b>1,703,074</b>

5. Services and Other Operating Expenditures						
Subagreements for Services	5100	0	0	0	0	0
Travel and Conferences	5200	41,388	0	127,000	127,000	85,612
Dues and Memberships	5300	75,508	68,000	10,000	78,000	2,492
Insurance	5400	153,816	154,849		154,849	1,033
Operations and Housekeeping Services	5500	58,193	59,045	0	59,045	852
Rentals, Leases, Repairs, and Noncap. Improvements	5600	350,348	408,974	0	408,974	58,626
Professional/Consulting Services and Operating Expend.	5800	10,487,447	10,050,128	865,587	10,915,715	428,268
Communications	5900	104,489	109,106	0	109,106	4,617
<b>Total, Services and Other Operating Expenditures</b>		<b>11,271,189</b>	<b>10,850,102</b>	<b>1,002,587</b>	<b>11,852,689</b>	<b>581,500</b>
6. Capital Outlay						
(Objects 6100-6170, 6200-6500 for modified accrual basis only)						
Land and Land Improvements	6100-6170	0	0	0	0	0
Buildings and Improvements of Buildings	6200	0	0	0	0	0
Books and Media for New School Libraries or Major Expansion of School Libraries	6300	0	0	0	0	0
Equipment	6400	0	0	0	0	0
Equipment Replacement	6500	0	0	0	0	0
Depreciation Expense (for accrual basis only)	6900	0	0	0	0	0
<b>Total, Capital Outlay</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
7. Other Outgo						
Tuition to Other Schools	7110-7143	0	0	0	0	0
Transfers of Pass-Through Revenues to Other LEAs	7211-7213	0	0	0	0	0
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE	0	0	0	0	0
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO	0	0	0	0	0
All Other Transfers	7280-7299	0	0	0	0	0
Debt Service:						0
Interest	7438	0	0	0	0	0
Principal (for modified accrual basis only)	7439	0	0	0	0	0
<b>Total, Other Outgo</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
8. TOTAL EXPENDITURES		<b>40,288,595</b>	<b>38,129,802</b>	<b>7,973,465</b>	<b>46,103,267</b>	<b>5,814,672</b>
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPEND. BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)		4,039,193	2,775,744	(1,626,086)	1,149,658	
Description	Object Code	2021-22 Estimated Actuals (A)	2022-23 Preliminary Budget Unrestricted (B)	2022-23 Preliminary Budget Restricted (C)	2022-23 Preliminary Budget Total (D)	Difference (Col A & D)
D. OTHER FINANCING SOURCES / USES						
1. Other Sources	8930-8979	0	0	0	0	0

2. Less: Other Uses	7630-7699	0	0	0	0	0
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999	0	(1,626,086)	1,626,086	0	0
4. TOTAL OTHER FINANCING SOURCES / USES		0	(1,626,086)	1,626,086	0	0
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)		4,039,193	1,149,658	(0)	1,149,658	0
F. FUND BALANCE, RESERVES						
1. Beginning Fund Balance						
a. As of July 1	9791	1,673,018	5,712,211		5,712,211	4,039,193
b. Adjustments/Restatements to Beginning Balance	9793, 9795	0			0	0
c. Adjusted Beginning Balance		1,673,018	4,086,125	1,626,086	5,712,211	
2. Ending Fund Balance, Oct 31 (E + F.1.c.)		5,712,211	5,235,783	1,626,086	6,861,869	1,149,658
Components of Ending Fund Balance:						
Reserve for Revolving Cash (equals object 9130)	9711	0	0	0	0	
Reserve for Stores (equals object 9320)	9712	0	0	0	0	
Reserve for Prepaid Expenditures (equals object 9330)	9713	0	0	0	0	
All Others	9719	3,697,781	2,930,620	1,626,086	4,556,706	
Legally Restricted Balance	9740	0		0	0	
Designated for Economic Uncertainties	9770	2,014,430	2,305,163		2,305,163	
Other Designations	9775, 9780	0	0	0	0	
Net Investment in Capital Assets (Accrual Basis Only)	9796	0	0	0	0	
Undesignated / Unappropriated Amount	9790	0	0	(0)	(0)	1,149,658

# CHARTER SCHOOL MULTI-YEAR PROJECTION - ALTERNATIVE FORM

Charter School Name: iLEAD Hybrid  
 CDS #: 19 75309 0131987  
 Charter Approving Entity: Acton-Agua Dulce Unified School District  
 County: Los Angeles  
 Charter #: 060248  
 Fiscal Year: 2022-23

2022-23 (populated from Alternative Form Tab)					
Description	Object Code	Preliminary Budget Unrestricted	Preliminary Budget Restricted	Preliminary Budget Total	Totals for 2023-24
<b>A. REVENUES</b>					
1. LCFF Sources					
State Aid - Current Year	8011	36,046,836		36,046,836	39,692,431
Education Protection Account - Current Year	8012	765,828		765,828	765,828
State Aid - Prior Years	8019	0		0	
Transfer of Charter Schools in Lieu of Property Taxes	8096	2,165,072		2,165,072	2,165,072
Other LCFF Transfers	8091, 8097	0		0	0
<b>Total, LCFF Sources</b>		<b>38,977,736</b>		<b>38,977,736</b>	<b>42,623,331</b>
2. Federal Revenues					
No Child Left Behind	8290		0	0	0
Special Education - Federal	8181, 8182		495,875	495,875	495,875
Child Nutrition - Federal	8220		57,575	57,575	58,727
Other Federal Revenues	8290	0	2,755,409	2,755,409	1,219,160
<b>Total, Federal Revenues</b>		<b>0</b>	<b>3,308,859</b>	<b>3,308,859</b>	<b>1,773,762</b>
3. Other State Revenues					
Special Education - State	StateRevSE		3,035,525	3,035,525	3,179,716
Child Nutrition Programs	8520		2,995	2,995	3,085
Mandated Costs Reimbursements	8550	89,282		89,282	94,095
Lottery - Unrestricted and Instructional Materials	8560	873,254	0	873,254	227,396
Low Performing Student Block Grant	8590	960,274	0	960,274	921,429
All Other State Revenues	StateRevAO	0	0	0	0
<b>Total, Other State Revenues</b>		<b>1,922,810</b>	<b>3,038,520</b>	<b>4,961,330</b>	<b>4,425,721</b>
4. Other Local Revenues					
Transfers from Sponsoring LEAs to Charter Schools	8791	0	0	0	0
All Other Local Revenues	LocalRevAO	5,000	0	5,000	0
<b>Total, Local Revenues</b>		<b>5,000</b>	<b>0</b>	<b>5,000</b>	<b>0</b>

<b>5. TOTAL REVENUES</b>		<b>40,905,546</b>	<b>6,347,379</b>	<b>47,252,925</b>	<b>48,822,814</b>	<b>49,588,869</b>
<b>B. EXPENDITURES</b>						
<b>1. Certificated Salaries</b>						
Teachers' Salaries	1100	10,195,578	3,934,605	14,130,183	14,412,787	14,701,042
Certificated Pupil Support Salaries	1200	213,963	320,566	534,529	545,220	556,124
Certificated Supervisors' and Administrators' Salaries	1300	398,535	0	398,535	406,506	414,636
Other Certificated Salaries	1900	214,302	113,387	327,689	334,243	340,928
<b>Total, Certificated Salaries</b>		<b>11,022,378</b>	<b>4,368,558</b>	<b>15,390,936</b>	<b>15,698,755</b>	<b>16,012,730</b>
<b>2. Non-certificated Salaries</b>						
Instructional Aides' Salaries	2100	556,537	209,970	766,507	781,837	797,474
Non-certificated Support Salaries	2200	75,000	92,559	167,559	170,910	174,328
Non-certificated Supervisors' and Administrators' Sal.	2300	0	0	0	0	0
Clerical and Office Salaries	2400	965,435	101,550	1,066,985	1,088,325	1,110,091
Other Non-certificated Salaries	2900	158,976	0	158,976	162,156	165,399
<b>Total, Non-certificated Salaries</b>		<b>1,755,948</b>	<b>404,079</b>	<b>2,160,027</b>	<b>2,203,228</b>	<b>2,247,292</b>
<b>Description</b>	<b>Object Code</b>	<b>Preliminary Budget Unrestricted</b>	<b>Preliminary Budget Restricted</b>	<b>Preliminary Budget Total</b>	<b>Totals for 2023-24</b>	<b>Totals for 2024-25</b>
<b>3. Employee Benefits</b>						
STRS	3101-3102	2,348,881	590,788	2,939,669	2,998,462	3,058,432
PERS	3201-3202	0	0	0	0	0
OASDI / Medicare / Alternative	3301-3302	266,075	112,130	378,205	385,769	393,484
Health and Welfare Benefits	3401-3402	1,966,677	121,266	2,087,943	2,129,702	2,172,296
Unemployment Insurance	3501-3502	111,370	6,510	117,880	120,238	122,642
Workers' Compensation Insurance	3601-3602	447,736	0	447,736	456,691	465,825
Retiree Benefits	3701-3702	102,683	0	102,683	104,737	106,831
PERS Reduction (for revenue limit funded schools)	3801-3802	0	0	0	0	0
Other Employee Benefits	3901-3902	0	0	0	0	0
<b>Total, Employee Benefits</b>		<b>5,243,423</b>	<b>830,693</b>	<b>6,074,116</b>	<b>6,195,598</b>	<b>6,319,510</b>
<b>4. Books and Supplies</b>						
Approved Textbooks and Core Curricula Materials	4100	250,693	40,000	290,693	296,507	302,437
Books and Other Reference Materials	4200	0	403	403	411	419
Materials and Supplies	4300	9,001,414	938,176	9,939,590	10,138,382	10,341,149
Noncapitalized Equipment	4400	5,240	329,949	335,189	341,893	348,731
Food	4700	604	59,020	59,624	60,816	62,033
<b>Total, Books and Supplies</b>		<b>9,257,951</b>	<b>1,367,548</b>	<b>10,625,499</b>	<b>10,838,009</b>	<b>11,054,769</b>
<b>5. Services and Other Operating Expenditures</b>						
Subagreements for Services	5100	0	0	0	0	0
Travel and Conferences	5200	0	127,000	127,000	0	0

Dues and Memberships	5300	68,000	10,000	78,000	79,560	81,151
Insurance	5400	154,849	0	154,849	157,946	161,105
Operations and Housekeeping Services	5500	59,045	0	59,045	60,226	61,430
Rentals, Leases, Repairs, and Noncap. Improvements	5600	408,974	0	408,974	417,153	425,497
Professional/Consulting Services and Operating Expend.	5800	10,050,128	865,587	10,915,715	11,134,029	11,356,710
Communications	5900	109,106	0	109,106	111,288	113,514
<b>Total, Services and Other Operating Expenditures</b>		<b>10,850,102</b>	<b>1,002,587</b>	<b>11,852,689</b>	<b>11,960,203</b>	<b>12,199,407</b>
<b>6. Capital Outlay</b>						
(Objects 6100-6170, 6200-6500 for modified accrual basis only)						
Land and Land Improvements	6100-6170	0	0	0	0	0
Buildings and Improvements of Buildings	6200	0	0	0	0	0
Books and Media for New School Libraries or Major Expansion of School Libraries	6300	0	0	0	0	0
Equipment	6400	0	0	0	0	0
Equipment Replacement	6500	0	0	0	0	0
Depreciation Expense (for accrual basis only)	6900	0	0	0	0	0
<b>Total, Capital Outlay</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>7. Other Outgo</b>						
Tuition to Other Schools	7110-7143	0	0	0	0	0
Transfers of Pass-Through Revenues to Other LEAs	7211-7213	0	0	0	0	0
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE	0	0	0	0	0
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO	0	0	0	0	0
All Other Transfers	7280-7299	0	0	0	0	0
Debt Service:						
Interest	7438	0	0	0	0	0
Principal (for modified accrual basis only)	7439	0	0	0	0	0
<b>Total, Other Outgo</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>8. TOTAL EXPENDITURES</b>		<b>38,129,802</b>	<b>7,973,465</b>	<b>46,103,267</b>	<b>46,895,792</b>	<b>47,833,708</b>
<b>C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPEND. BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)</b>		<b>2,775,744</b>	<b>(1,626,086)</b>	<b>1,149,658</b>	<b>1,927,021</b>	<b>1,755,161</b>
Description	Object Code	Preliminary Budget Unrestricted	Preliminary Budget Restricted	Preliminary Budget Total	Totals for 2023-24	Totals for 2024-25
<b>D. OTHER FINANCING SOURCES / USES</b>						
1. Other Sources	8930-8979	0	0	0	0	0
2. Less: Other Uses	7630-7699	0	0	0	0	0
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999	(1,626,086)	1,626,086	0	0	0



<b>4. TOTAL OTHER FINANCING SOURCES / USES</b>		(1,626,086)	1,626,086	0	0	0
<b>E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)</b>		1,149,658	(0)	1,149,658	1,927,021	1,755,161
<b>F. FUND BALANCE, RESERVES</b>						
1. Beginning Fund Balance		0	0			
a. As of July 1	9791	5,712,211	0	5,712,211	6,861,869	8,788,890
b. Adjustments/Restatements to Beginning Balance	9793, 9795	0	0	0	0	0
c. Adjusted Beginning Balance		5,712,211	0	5,712,211	6,861,869	8,788,890
<b>2. Ending Fund Balance, Oct 31 (E + F.1.c.)</b>		<b>6,861,869</b>	<b>(0)</b>	<b>6,861,869</b>	<b>8,788,890</b>	<b>10,544,051</b>
Components of Ending Fund Balance:						
Reserve for Revolving Cash (equals object 9130)	9711	0	0	0	0	0
Reserve for Stores (equals object 9320)	9712	0	0	0	0	0
Reserve for Prepaid Expenditures (equals object 9330)	9713	0	0	0	0	0
All Others	9719	2,930,620	1,626,086	4,556,706	6,444,101	8,152,366
Legally Restricted Balance	9740		0	0	0	0
Designated for Economic Uncertainties	9770	2,305,163		2,305,163	2,344,789	2,391,685
Other Designations	9775, 9780	0	0	0	0	0
Net Investment in Capital Assests (Accrual Basis Only)	9796	0	0	0	0	0
Undesignated / Unappropriated Amount	9790	0	(0)	(0)	0	0



# iLEAD California Charters 1

## Employee Guidebook

Board Approved ~~June 21, 2021~~ [insert date]

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## INTRODUCTION

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Welcome to iLEAD California Charters 1!

We recognize that our greatest asset is our team of employees. We value the many talents and abilities of our employees and strive for an environment of teamwork, open communication, mutual support, and professionalism.

We designed this Employee Guidebook to provide you with general information about our policies, procedures and guidelines. We always strive to improve, and we encourage your ideas or suggestions. Please take some time to review this Guidebook and if you have any questions, please contact your Director or Employee Services.

The information contained in this Guidebook applies to all employees at iLEAD California Charters 1 (“iLEAD” or “School”). It is important that all employees read, understand and follow the provisions in this Guidebook. It is not intended to create any expectations of continued employment or as a contract between iLEAD and any of its employees.

This Guidebook supersedes any previously issued Guidebooks, policies, benefit statements and/or memoranda, whether written or verbal. iLEAD reserves the right to alter, modify, amend, delete and/or supplement any employment policy or practice with or without notice to you.

Once you have reviewed this Guidebook, please sign the ~~two~~-employee acknowledgement forms at the end of this Guidebook, keep one for your files and provide the other to Employee Services. This signed acknowledgement demonstrates to iLEAD that you have read, understand and agree to comply with the policies outlined in the Guidebook.

## HIRING POLICIES AND PROCEDURES

---

### AT WILL EMPLOYMENT

We hope to have a long and mutually beneficial relationship with you. Your employment with iLEAD is at-will and is voluntary and is subject to termination may be terminated by you or iLEAD at will any time, with or without cause, and with or without notice, ~~at any time~~. Similarly, your status (for example, position, duties, salary, promotions, demotions, etc.) may be changed at-will, with or without cause and with or without notice at any time. Nothing in this ~~Handbook~~ Guidebook or in any document or statement shall limit ~~the~~ iLEAD's right to terminate your employment at-will or limit iLEAD's right to transfer, demote, suspend, administer discipline, and change the terms and conditions of employment at its sole discretion. This Guidebook does not reflect a contract of employment, either express or implied, between you and iLEAD.

No iLEAD representative is authorized to modify this policy for any employee, unless in writing and approved in writing by the Governing Board of Directors.

### OPEN DOOR POLICY

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At some time or another, you may have a suggestion, complaint, or question about iLEAD, your job, your working conditions, or the treatment you are receiving. We welcome your concerns, suggestions, complaints, and questions, and encourage you to bring them to our attention. For issues other than prohibited harassment, discrimination, or retaliation, we ask that you take your concerns first to your supervisor, who will attempt to provide a solution or explanation. If the problem is still not resolved, you may present it to Employee Services or the Director, preferably in writing, who will address your concerns.

### ~~WORKPLACE VIOLENCE~~ WORKPLACE ANTI-VIOLENCE POLICY

---

iLEAD is committed to providing a workplace that is free from acts of violence or threats of violence. In keeping with this commitment, iLEAD has established a strict policy that prohibits any employee from threatening or committing any act of violence in the workplace, while on duty, while on iLEAD-related business, or while operating any vehicle or equipment owned or leased by iLEAD. This policy applies to all employees.

Workplace violence includes, but is not limited to, threats of any kind; threatening, physically aggressive, or violent behavior, such as intimidation or attempts to instill fear in others; other behavior that suggests a propensity toward violence, including belligerent speech, excessive arguing or swearing, sabotage, threats of sabotage of iLEAD property; defacing iLEAD property or causing physical damage to the facilities; and bringing weapons or firearms of any kind on iLEAD premises or while conducting iLEAD business on or off iLEAD property.



In order to achieve our goal of providing a workplace that is secure and free from violence, iLEAD must enlist the support of all employees. Compliance with this policy and iLEAD's commitment to a zero-tolerance policy with respect to workplace violence is every employee's responsibility.

Compliance with this anti-violence policy is a condition of employment. Due to the importance of this policy, employees who violate any of its terms, who engage in or contribute to violent behavior, or who threaten others with violence may be subject to disciplinary action, up to and including immediate termination.

~~Employees are required to report any incident involving a threat of violence or act of violence immediately. If any employee observes or becomes aware of any of the above-listed actions or behavior by an employee, student, parent, visitor, or anyone else, he or she must immediately notify to~~ their supervisor or Employee Services. If these individuals are not available, report the incident to any other supervisor and report the incident to the Employee Services as soon as possible. All reports will be investigated by iLEAD and appropriate corrective action will be taken.

If an employee becomes aware of an imminent act of violence, a threat of imminent violence, or actual violence, emergency assistance must be sought immediately. In such situations, the employee should contact law enforcement authorities by dialing 911. Immediately after contacting law enforcement authorities, the employee must report the incident to Employee Services.

Employees should immediately inform their supervisor or Employee Services about any workplace security hazards. If these individuals are not available, the employee should immediately inform any other supervisor so that appropriate action can be taken.

In certain circumstances, iLEAD may seek a workplace violence restraining order on behalf of one or more employees in furtherance of its commitment to providing a workplace that is free from acts of violence or threats of violence. Furthermore, employees should notify Employee Services if any restraining order is in effect or if a potentially violent non-work-related situation exists that could result in violence in the workplace.

Any person who violates this policy on iLEAD property may be removed from the premises as quickly and safely as possible, at the iLEAD's discretion, and may be required to remain off iLEAD premises pending the outcome of an investigation of the incident.

All reports of workplace violence will be taken seriously. If iLEAD determines that workplace violence has occurred, iLEAD will take appropriate corrective action and may impose disciplinary action, up to and including termination.

There will be no retaliation against any employee who brings a complaint in good faith under the Workplace Anti-Violence Policy or who honestly assists in investigating such a complaint, even if the investigation produces insufficient evidence that there has been a violation, or if the charges cannot be proven. However, disciplinary action may be taken against employees who, in bad faith, make false or frivolous accusations.

# IMMIGRATION COMPLIANCE

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iLEAD does not discriminate against any individual because of his or her national origin, citizenship or intent to become a U.S. citizen. It is, however, the policy of iLEAD to only employ those individuals ~~that~~ who are authorized to work in the United States. Therefore, iLEAD requires each prospective employee to provide documents verifying his or her identity and authorization to be legally employed in the United States.

As a condition of employment, each new employee must properly complete, sign and date the first section of the USCIS Form I-9, on or prior to the first day employment commences and present documentation establishing identity and employment eligibility within three business days after he or she begins work. If the employee cannot verify his/her right to work in the United States within three business days of employment, iLEAD will be required to terminate his/her employment immediately.

## REASONABLE ACCOMMODATIONS, DISCRIMINATION, UNLAWFUL HARASSMENT, RETALIATION, AND COMPLIANT PROCEDURES

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iLEAD adopted the following policies pursuant to the California Fair Employment and Housing Act and related state and federal laws regarding discrimination, unlawful harassment, and retaliation.

iLEAD is committed to providing a professional work environment free from discrimination, unlawful harassment, and retaliation. Accordingly, iLEAD has adopted the following policies, which are designed to prevent unlawful conduct in the workplace, encourage professional and respectful behavior in the workplace, promote the reporting of potential violations, and foster taking corrective action where appropriate, even if the violation does not rise to the level of unlawful conduct.

All employees are expected to assume responsibility for maintaining a professional work environment in accordance with the following policies. As such, all employees who experience potential violations of the following policies are strongly encouraged to promptly report such violations so that iLEAD may have an opportunity to address and resolve any concerns. All other employees (particularly supervisors) are required to immediately report any potential violations of the following policies. iLEAD is committed to responding to alleged violations of this policy in a timely and fair manner and to taking appropriate action aimed at ending the prohibited conduct.

### REQUESTS FOR REASONABLE ACCOMMODATIONS: MEDICAL AND RELIGIOUS

To comply with applicable laws ensuring equal employment opportunities to qualified individuals with a disability, iLEAD will make a good faith effort to provide reasonable accommodations for the known physical or mental limitations of an otherwise qualified applicant or employee with a disability, unless undue hardship would result to iLEAD. An applicant or employee who believes he or she requires an accommodation in order to perform the essential functions of the job should contact Employee Services and request such an accommodation, specifying

what accommodation he or she needs to perform the job. iLEAD will analyze the situation, engage in an interactive process with the individual, and respond to the individual's request.

The individual is required to fully cooperate with iLEAD in seeking and evaluating alternatives and accommodations. Supervisors that become aware of information that an employee may need a reasonable accommodation to perform the essential functions of his or her job must report it to Employee Services. iLEAD will engage in the interactive process in compliance with applicable law. iLEAD may require medical verification of both the disability and the need for an accommodation.

iLEAD will not discriminate against any individual in regards to compensation or any term or condition of employment because of a conflict with an individual's religious beliefs or observance and any employment requirement. To the extent an employment requirement conflicts with an individual's religious beliefs or observance, iLEAD will explore potential reasonable accommodations and will make a good faith effort to implement reasonable accommodations unless an undue hardship would result. An applicant or employee who believes he or she requires a religious accommodation in order to perform any job requirement should notify Employee Services and request an accommodation.

Pregnancy and lactation accommodations may also be requested. Please refer to the Lactation and Pregnancy Disability Leave policies set forth herein for further information.

#### **EQUAL EMPLOYMENT OPPORTUNITY (DISCRIMINATION)**

Covered Individuals: This policy protects all employees of iLEAD as well as interns, volunteers, and potential employees (applicants). All employees of iLEAD are required to abide by this policy, regardless of position or status, including supervisors, management, and co-workers.

Discrimination: As used in this policy, "discrimination" means taking any adverse employment action against an employee or applicant in any aspect of employment, solely or in part based on the individual's protected category. Discrimination may include, but is not necessarily limited to, factoring an individual's protected category in hiring, promotion, compensation, or other terms and conditions of employment unless otherwise permitted by law.

Adverse Employment Action: As used in this policy, "adverse employment action" may include, but is not necessarily limited to, the following: demotion; suspension; reduction in pay; denial of a merit salary increase; failure to hire or consider for hire; refusal to promote or consider for promotion; denial of employment opportunities; change of an employee's work assignments; failure to provide a workplace accommodation when required (i.e., disability, pregnancy, religion, transgender); failure to provide a leave of absence when required (i.e., medical, pregnancy, workers' compensation, military, domestic violence); or any other unequal treatment based on the individual's protected category resulting in an adverse employment action.

Protected Categories: iLEAD's policy prohibits discrimination based on race (which includes historically associated traits, such as hair styles and protective hair styles, e.g., braids, locks, and twists), religious creed (which includes religious dress and grooming practices), color, national origin (which includes, but is not limited to, national origin groups and aspects of national origin, such as height, weight, accent, or language proficiency), ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex (which includes pregnancy, childbirth, breastfeeding, and related medical conditions), gender, gender identity, gender expression, age, sexual

orientation, military or veteran status (including state and federal active and reserve members as well as those ordered to duty or training), immigration/citizenship status ~~or related protected activities~~ (which includes undocumented individuals and victims of human trafficking) or related protected activities, protected medical leaves, domestic violence victim status, political affiliation, or any other consideration made unlawful by federal, state, or local laws, ordinances, or regulations. These categories include a perception that the individual has any of these characteristics or is associated with a person who has (or is perceived to have) any of these characteristics.

Scope of Policy: iLEAD is an equal employment opportunity employer and is committed to complying with all applicable laws providing equal employment opportunities. As such, iLEAD makes employment decisions, including, but not limited to, hiring, recruiting, firing, promotion, demotion, training, compensation, qualifications/job requirements, on the basis of merit and/or business necessity. Employment decisions are based on an individual's qualifications as they relate to the job under consideration pursuant to legitimate business purposes.

If you believe you have been subjected to, witnessed, or have knowledge about discrimination, please follow the complaint procedure outlined below

## UNLAWFUL HARASSMENT

Covered Individuals: This policy protects all employees of iLEAD as well as interns, volunteers, and potential employees (applicants). All employees of iLEAD are required to abide by this policy, regardless of position or status, including supervisors, management, and co-workers. In addition, this policy prohibits unlawful harassment by any third parties. iLEAD will take all reasonable steps to prevent or eliminate unlawful harassment by non-employees, including ~~customers~~, parents, students, vendors, contractors, and suppliers, who have workplace contact with our employees.

Protected Categories: iLEAD's policy prohibits harassment based on race (which includes historically associated traits, such as hair styles and protective hair styles, e.g., braids, locks, and twists), religious creed (which includes religious dress and grooming practices), color, national origin (which includes, but is not limited to, national origin groups and aspects of national origin, such as height, weight, accent, or language proficiency), ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex (which includes pregnancy, childbirth, breastfeeding, and related medical conditions), gender, gender identity, gender expression, age, sexual orientation, military or veteran status (including state and federal active and reserve members as well as those ordered to duty or training), immigration/citizenship status ~~or related protected activities~~ (which includes undocumented individuals and victims of human trafficking) or related protected activities, protected medical leaves, domestic violence victim status, political affiliation, or any other consideration made unlawful by federal, state, or local laws, ordinances, or regulations. These categories include a perception that the individual has any of these characteristics or is associated with a person who has (or is perceived to have) any of these characteristics.

Unlawful Harassment: Prohibited unlawful harassment may include, but is not necessarily limited to, the following behavior pertaining to *any of the above protected categories*:

- *Verbal conduct* such as unwanted sexual advances including flirting, sexually suggestive innuendos, conversations regarding sexual activities, and sexual invitations or comments, racial slurs or epithets, sexist or misogynistic comments, ethnic insults or jokes, religious aspersions or mockery, disability insults or ridicule, homophobic epithets or slurs, transphobic comments or derision, derogatory

comments regarding gender, gender identity or gender expression, disparaging remarks regarding military or veteran status, threats of deportation against applicants and employees and family members of applicants and employees, derogatory comments about immigration status or mockery of an accent or language or its speakers, negative remarks regarding marital status, or any other belittling, negative or derogatory comments regarding any protected characteristic (“hostile work environment” harassment).

- Disrespectful or unprofessional conduct based on any of the protected categories listed above (“hostile work environment” harassment).
- Comments or conduct that consistently target one gender, even if the content is not sexual (“hostile work environment” harassment).
- *Visual conduct* such as derogatory and/or sexually oriented posters, photography, cartoons, objects, drawings, gestures, text messages, social media posts, instant messages, e-mails, letters, pictures, or gifts (“hostile work environment” harassment).
- *Physical conduct* such as assault, unwanted touching, blocking normal movement, or interfering with work because of any protected basis (“hostile work environment” harassment).
- Threats and demands to submit to sexual requests as a condition of continued employment or to avoid some other loss and offers of employment benefits in return for sexual favors (“quid pro quo” harassment).

Sexually harassing conduct does not need to be motivated by sexual desire and may include situations that began as reciprocal relationships but later ceased to be reciprocal.

Scope of Policy: iLEAD is committed to providing a work environment free of unlawful harassment. This policy applies to all phases of employment, including, but not limited to, recruiting, testing, hiring, ~~upgrading~~, promotion, demotion, transfer, layoff, termination, rates of pay, benefits, and selection for training. In addition, this policy extends to conduct with a connection to an employee’s work, even when the conduct takes place away from iLEAD’s premises, such as a ~~business-business or school~~ trip, ~~business-business or school~~-related social function, or social media activity (depending on the circumstances).

If you believe you have been subjected to, witnessed, or have knowledge about unlawful harassment, please follow the complaint procedure outlined below

## RETALIATION

Covered Individuals: This policy protects all employees of iLEAD as well as interns, volunteers, and potential employees (applicants). All employees of iLEAD are required to abide by this policy, regardless of position or status, including supervisors, management, and co-workers.

Retaliation: As used in this policy, “retaliation” means taking any adverse employment action against an employee because he or she engaged in protected activity pursuant to this policy. Protected activity may include, but is not necessarily limited to, the following: opposing a practice or conduct the employee reasonably believes to be unlawful; reporting or assisting in reporting suspected violations of this policy; cooperating or participating in

investigations or proceedings arising out of a violation of this policy; or engaging in any other activity protected by applicable law.

Adverse Employment Action: As used in this policy, “adverse employment action” means conduct or an action that materially affects the terms and conditions of the employee’s employment status or is reasonably likely to deter the employee from engaging in further protected activity. Adverse employment actions may include, but are not limited to, the following: demotion; suspension; reduction in pay; denial of a merit salary increase; failure to hire or consider for hire; refusing to promote or consider for promotion because of reporting a violation of this policy; harassing another employee for filing a complaint; denying employment opportunities because of making a complaint or for cooperating in an investigation; changing an employee’s work assignments ~~for identifying harassment or other forms of discrimination in the workplace~~ because of engagement in activities protected under this policy; treating an employee differently such as denying an accommodation; not talking to an employee (the “cold shoulder”) when otherwise required by job duties; or otherwise excluding the employee from job-related activities because of engagement in activities protected under this policy.

Any retaliatory adverse action because of protected activity may be unlawful and will not be tolerated. If you believe you have been subjected to, witnessed, or have knowledge about retaliation, please follow the complaint procedure outlined below.

#### COMPLAINT PROCEDURE—DISCRIMINATION, UNLAWFUL HARASSMENT, RETALIATION

Duty to Report: At iLEAD, we encourage all employees to be vigilant and aware of how we are treating others. Each Supervisor has the responsibility to maintain a work place and educational environment free from any form of sexual or other unlawful harassment. All employees who believe they have been subjected to discrimination, unlawful harassment, and/or retaliation are strongly encouraged to promptly report the alleged violation(s) in accordance with the procedures set forth below. All employees (particularly supervisors) who believe they have witnessed or have knowledge of discrimination, unlawful harassment, and/or retaliation are required to immediately report the alleged violation(s) in accordance with the procedures set forth below. Immediate reporting allows iLEAD to quickly and fairly resolve any complaints in the workplace.

Title IX provides for separate processes and procedures for formal complaints of sexual harassment falling within the definitions provided in Title IX regulations. For those types of complaints, the School’s grievance procedures can be found in its Title IX policy posted to the website. Please contact the School’s Title IX Coordinator for further information.

In addition to reporting, any employee who experiences or witnesses conduct that the individual believes ~~is unlawful~~ violates this policy is encouraged to tell the offending individual that the behavior is inappropriate and must be stopped, if the employee is comfortable doing so.

Where to Report Complaints to iLEAD: Submit a complaint to Administration, ~~or~~ Employee Services, or your supervisor. If these individuals are not available, or in the event you believe that one of these individuals has engaged in inappropriate behavior in violation of these policies, submit a complaint to any other supervisor as soon as possible. There is no requirement to report your complaint to any designated supervisor within iLEAD. Select the individual with whom you feel the most comfortable discussing your complaint. Do not report your complaint to



any individual who has allegedly engaged in the inappropriate behavior that is the subject of your complaint. If you have a complaint that involves the Chief Executive Officer, submit the complaint directly to the Chair of the Board of Directors.

Should a supervisor become aware of any conduct that may constitute unlawful harassment, discrimination, retaliation, or other prohibited behavior, the supervisor must report the conduct to Employee Services immediately so that action may be taken to address and remediate such conduct. Supervisors who fail to report alleged violations may be subject to disciplinary action, up to and including termination.

Contents of Complaint: A Harassment Complaint Form may be obtained from the Employee Services. However, reports may be provided verbally. Your report should be specific and should include the names of the individuals involved, the names of any witnesses, and any supporting documentation. Employees may choose to submit their complaints anonymously.

Response to Complaint (Investigation): Upon notice of conduct requiring an investigation, iLEAD will look into the facts and circumstances of the alleged violation, as appropriate. iLEAD will attempt to resolve the situation by promptly undertaking an effective, thorough, and objective investigation through the use of “qualified personnel” and using methods that provide all parties with “appropriate due process.” iLEAD’s investigation methods will vary depending on the nature of the complaint, the allegations, the witnesses, and other factors. All complaints will be handled as confidentially as possible and information will be disclosed only as it is necessary to complete the investigation and resolve the matter.

iLEAD may investigate conduct in the absence of a formal complaint if iLEAD has reason to believe that an individual has engaged in conduct that violates iLEAD policies or applicable law. Further, iLEAD may continue its investigation even if the original complainant withdraws his or her complaint during the course of the investigation.

All employees are required to fully cooperate with iLEAD’s investigation, which includes, but is not limited to, providing all pertinent information in a truthful manner, submitting pertinent documents in their possession, not interfering with the investigation in any manner, and maintaining an appropriate level of discretion regarding the investigation. Failure to do so may result in disciplinary action, up to and including termination.

During the investigation, iLEAD will provide regular progress updates, as appropriate, to those directly involved. iLEAD will strive to complete its investigation as efficiently as possible in light of the allegations and will reach any conclusions based on the evidence collected and credibility of the witnesses. At the completion of its investigation, iLEAD will inform the complainant(s) and the accused of its findings and decisions to the extent permitted by applicable law.

Corrective Action: If iLEAD determines that violations have occurred, iLEAD will take appropriate corrective action in accordance with the circumstances involved, including appropriate action to deter future conduct. Examples of potential corrective action include, but are not limited to, written or verbal disciplinary action, suspension, reassignment, demotion, or termination, among others. In addition, the offending individual may be legally liable for his or her conduct, depending on the circumstances. Due to privacy protections, iLEAD is not able to fully disclose its entire decision regarding corrective action to the complainant.

No Retaliation: There will be no retaliation against any employee who brings a complaint in good faith or who honestly assists in investigating such a complaint, even if the investigation produces insufficient evidence that there has been a violation, or if the charges cannot be proven. Please refer to iLEAD's Retaliation Policy above for further information.

How to Report Complaint to Government Agencies: Employees who believe that they have experienced unlawful conduct under these policies may also file a complaint with the local office of the California Department of Fair Employment and Housing ("DFEH") or the U.S. Equal Employment Opportunity Commission ("EEOC"). The DFEH and the California Fair Employment and Housing Council ("FEHC") as well as the EEOC can also order an employer to hire, reinstate, or promote a victim of discrimination, unlawful harassment, and/or retaliation or make other changes in iLEAD's policies. The address and phone number of the local DFEH and EEOC offices can be found online or dialing 800-FREE-411.

## TRAINING REQUIREMENTS

iLEAD requires all employees to abide by California's training requirements, which includes training within six months of hire and retraining every two years thereafter. Employees who fail to complete this required training will be subject to disciplinary action, up to and including termination.

## ANTI-BULLYING POLICY

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In addition to iLEAD's commitment to providing an environment free from unlawful harassment, discrimination, and retaliation, iLEAD prohibits workplace bullying.

Any employee who believes that he or she has been bullied, is being coerced to participate in bullying or who has information about bullying conduct by a coworker, supervisor, agent, parent, vendor or other third party not employed by iLEAD should provide a written or verbal report to Employee Services, his or her supervisor, or any other member of Administration.

If the employee's supervisor is the individual about whom the employee has a complaint, or concern, the employee should make a report to Employee Services.

iLEAD will look into any complaints of workplace bullying. iLEAD will endeavor to protect the privacy and confidentiality of all parties involved to the extent possible. If a complaint of bullying is substantiated, appropriate disciplinary action, up to and including discharge, may be taken.

iLEAD will not tolerate retaliation against any employee who makes a good faith complaint regarding workplace bullying.



## ~~DISABILITY ACCOMMODATION~~

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~~To assist our fellow coworkers who are disabled or become disabled and to comply with applicable laws ensuring equal employment opportunities to individuals with disabilities, iLEAD will make reasonable accommodations for the known physical or mental limitations of an otherwise qualified applicant or employee with a disability, unless undue hardship would result to iLEAD.~~

~~Any applicant or employee who requires an accommodation should contact Employee Services and request such an accommodation. The individual with the disability should specify in writing what accommodation he or she needs to perform the job. iLEAD will analyze the situation, engage in an interactive process with the individual, and respond to the individual's request.~~

~~If the accommodation is reasonable and will not impose an undue hardship on iLEAD and/or a direct threat to the health and/or safety of the individual or others, iLEAD may make the accommodation. iLEAD may also propose an alternative accommodation. The individual is required to fully cooperate with iLEAD in seeking and evaluating alternatives and accommodations. Supervisors that become aware of information that an employee may need a reasonable accommodation to perform the essential functions of his or her job must report it to Employee Services. iLEAD will engage in the interactive process in compliance with applicable law. iLEAD may require medical verification of both the disability and the need for an accommodation.~~

~~iLEAD will also consider requests for reasonable accommodations for medical conditions related to pregnancy and childbirth where supported by medical documentation and will make lactation accommodations in accordance with the policy in this handbook.~~

~~If you believe you have been subjected to discrimination, please follow the complaint procedure outlined below.~~

## ~~RELIGIOUS ACCOMMODATION~~

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~~We value the diverse backgrounds of our employees and will attempt to make reasonable accommodations for employee observance of religious holidays and sincerely held religious beliefs, including time off for religious holidays and accommodations related to dress and grooming practices, unless doing so would cause an undue hardship on iLEAD. If you desire a religious accommodation, please make the request in writing to your supervisor or Employee Services as far in advance as possible. If you believe you have been subjected to discrimination, please follow the complaint procedure outlined below.~~

## WHISTLEBLOWER POLICY

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In accordance with applicable law, iLEAD prohibits retaliation against any employee because of the employee's refusal to participate in an activity that would result in a violation of a state or federal statute, or a violation or noncompliance with a state or federal rule or regulation, or for disclosing information to a government or law enforcement agency, where the employee has reasonable cause to believe that the information discloses a violation of a state or federal statute, or a violation or noncompliance with a state or federal rule or regulation. iLEAD also prohibits any retaliation against an applicant or employee, and does not discriminate against any applicant or employee, based on that applicant or employee's "whistle-blowing" activity against a former employer.

Employees who have concerns about practices that are believed to be illegal or violate iLEAD's policies are encouraged to report them to their supervisor or Employee Services. Employees who come forward with credible information on practices believed to be illegal or violations of iLEAD policy will be protected from retaliation.

Any Employee who reasonably believes that he or she is a victim of retaliation may also call a State of California "whistle-blower hotline" to report the retaliation: (800) 952-5665.

## EMPLOYEE CLASSIFICATION

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iLEAD's employees are classified in the following categories: Exempt or, Non-Exempt, Full-Time or, Part-Time, or Regular or Temporary/On Call. All employees are either exempt or non-exempt according to provisions of applicable wage and hour laws. An employee will not change from one status to any other status or classification simply because of the number of hours that the employee is scheduled to work or the length of time spent as an employee.

Because all employees are employed at-will and hired for an unspecified duration, these classifications do not guarantee employment for any specific length of time. Employment is at the mutual consent of the employee and iLEAD. Accordingly, either the employee or iLEAD can terminate the employment relationship at-will, at any time, with or without cause or advance notice.

**Exempt:** Exempt employees are those employees with job assignments that meet exemption tests under state and federal law making them exempt from overtime pay requirements. Exempt employees are compensated on a salary basis and are not entitled to overtime pay.

**Non-Exempt:** Non-exempt employees are those employees with job assignments that do not meet exemption tests under state or federal law. These employees are paid on an hourly basis and are entitled to overtime wages for overtime worked in accordance with the law. Non-exempt employees may have to work hours beyond their normal schedules as work demands require. Non-exempt employees are required to take meal and rest periods in the manner described in this Guidebook.

**Full-Time:** Full time employees are those employees who are regularly scheduled to work at least 30 hours in a week.

**Part-Time:** Part time employees are those employees who are regularly scheduled to work less than 30 hours in a week.

**Regular:** Regular employees are those who are hired to work on a regular schedule. Regular employees may be classified as full-time or part-time.

**Temporary/On Call:** These are positions that work schedules of no particular hours or duration. Employees who occupy these positions may also be expected to work an on- going but irregular schedule OR to work short-term temporary schedules OR to work on-call. The status of a temporary employee may change only if the employee is notified of the change in status, in writing, by the Chief Executive Officer or the employee's supervisor.

Unless otherwise required by law, Part-Time and Temporary/On Call employees are not entitled to benefits provided by iLEAD. If you have any questions about your classification, please consult with Employee Services.

## FAMILIAL AND RELATED CONFLICT OF INTEREST

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iLEAD wants to preserve a working environment that has clear boundaries between personal and professional relationships. All employees must avoid situations involving actual or potential conflicts of interest.

Some situations such as the ones described below can create conflicts of interest requiring iLEAD to take the employee's relationship with another employee, parent, student, vendor, or contractor into account.

An employee should not be in a supervisory role with another employee who is a relative (i.e.g., sibling, parent, spouse, domestic partner, etc.). Supervisors should avoid situations that result in actual or perceived conflicts of interest with supervised employees and situations of actual or perceived favoritism.

A supervisor should avoid forming special social relationships or dating employees under his or her direct supervision, or with other employees that would create actual or perceived conflicts of interest or situations of actual or perceived favoritism. If such a relationship arises, both employees should notify iLEAD-Employee Services so that appropriate measures can be taken to prevent conflicts of interest or favoritism.

If a staff member forms a special social relationship or begins dating a parent of an iLEAD student, the staff member ~~should ensure that he or she does not treat the student differently from other students in any manner and under any circumstances. If a conflict arises, the staff member~~ must immediately notify iLEAD-Employee Services so that appropriate measures may be taken to address the situation.

An employee involved in any relationships or situations that he or she believes may constitute a conflict of interest, should immediately and fully disclose the relevant circumstances to his or her immediate supervisor, or any other appropriate supervisor, for a determination about whether a potential or actual conflict exists. If an actual or potential conflict is determined, iLEAD may take whatever corrective action appears appropriate according to the

circumstances. Failure to disclose facts related to a potential or actual conflict of interest may constitute grounds for disciplinary action.

Failure to comply with [this policy and](#) the [School's Anti-Nepotism Policy](#) may result in disciplinary action, up to and including termination.

## FINANCIAL CONFLICT OF INTEREST

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While employed by iLEAD, employees owe a duty of loyalty to iLEAD and are required to avoid any situation that presents an actual or potential conflict of interest. An actual or potential conflict of interest occurs when an employee is in a position to influence a decision that may result in a personal gain for that employee or for a relative as a result of iLEAD's business dealings.

Improper personal gain may result not only where an employee or relative has a significant ownership interest in a company with which iLEAD does business but also when an employee or relative receives any kickback, bribe, substantial gift, or special consideration as a result of any transaction or business dealings involving iLEAD. The receipt of occasional flowers, candy or gifts worth less than \$250.00 from students, parents, or vendors fall outside the intent of this policy and acceptance of such items is permissible. However, employees must obtain written approval from Employee Services before accepting any item worth in excess of \$250.00 from students, parents, or vendors.

Failure to comply with [this policy and](#) the [School's](#) Conflicts of Interest Policy may result in disciplinary action, up to and including termination.

## CERTIFICATION AND LICENSURE OF INSTRUCTIONAL STAFF

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Each of iLEAD's core academic teachers is required to hold a Commission on Teacher Credentialing certificate, permit, or other document required for the teacher's certificated assignment in accordance with applicable state and federal law. If an instructional staff employee believes that he or she is assigned to teach in a subject in whom he or she does not have subject matter competence, the employee should immediately report the same to the Administration. A staff member who is required to meet State and federal certification, expertise, and related requirements must maintain such qualifications as a condition of employment at iLEAD. Expenses incurred for updating and/or maintaining the required credentialing certificates, licenses or related permits are borne by the employee.

## TUBERCULOSIS TESTING

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No person shall be employed by the School unless he or she provides proof of having submitted to a tuberculosis (“TB”) risk assessment within the past 60 days and that no risk factors have been identified. If TB risk factors are identified, or as an alternative to the assessment, the applicant must submit proof that a qualified professional has determined he or she is free of infectious TB following testing and examination. The examination, if required, shall consist of an approved intra-dermal tuberculin test or any other test for tuberculosis infection that is recommended by the federal Centers for Disease Control and Prevention (“CDC”) and licensed by the federal Food and Drug Administration (“FDA”). If the test is positive, the test shall be followed by an X-ray of the lungs. Each employee shall cause to be on file with the School a certificate from a qualified professional showing the employee was assessed or examined and found free of risk factors or of infectious TB (as applicable). A person who transfers employment from another school can meet these requirements by providing: (a) a certificate from a qualified professional that shows he or she was found to be free of infectious TB within 60 days of initial hire or (b) a verification from the prior school employer that the person has a certificate on file showing the person is free from infectious TB.

An employee who has no identified risk factors or who tests negative for TB shall undergo the TB risk assessment and, if risk factors are identified, the examination, at least once every four years or more often if recommended by the local health officer.

The risk assessment, and examination if necessary, is a condition of initial employment, and the expense incident thereto shall be borne by the applicant. The School shall reimburse current employees for the cost, if any, of the tuberculosis risk assessment and the examination.

The County Health Department may provide skin testing to employees at regular intervals at no cost to the employee. The availability of this testing may be announced by iLEAD.

~~To protect the health of our students and team, employees must provide either proof of an examination within the past 60 days and that he or she is free of active tuberculosis, or complete and submit iLEAD’s Adult Tuberculosis (“TB”) Risk Assessment Questionnaire and TB Physician’s Certification in accordance with applicable laws.~~

~~Employees transferring from other public or private schools within the State of California must either provide proof of an examination that he/she is free from TB within the previous 60 days or a certification showing that he or she was examined within the past four years and was found to be free of communicable tuberculosis. It is also acceptable practice for the employee’s previous school employer to verify verifies that it has a certificate on file that contains the showing that the employee was examined within the past four years and was found to be free of communicable tuberculosis.~~

~~If TB risk factors are identified, or as an alternative to the assessment, the applicant must submit proof that a qualified professional has determined he or she is free of infectious TB following testing and examination. The examination, if required, shall consist of an approved intradermal tuberculin test, which, if positive, shall be followed by an X-ray of the lungs or provide the Risk Assessment and Physician’s Certification.~~

~~The County Health Department may provide skin testing to employees at regular intervals at no cost to the employee. The availability of this testing may be announced by iLEAD.~~

~~Each employee is required to have the appropriate documentation on file with iLEAD. An employee who has no identified risk factors or who tests negative for TB shall undergo the TB risk assessment and, if risk factors are identified, the examination, at least once every four years or more often if directed by the Board upon recommendation by the local health officer.~~

~~The risk assessment, and examination if necessary, is a condition of initial employment, and the expense incident thereto shall be borne by the applicant. iLEAD shall reimburse current employees for the cost, if any, of the tuberculosis risk assessment and the examination.~~

## CRIMINAL BACKGROUND CHECKS

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As a condition of employment, iLEAD requires all applicants for employment to complete fingerprinting and background checks consistent with legal requirements. iLEAD will not employ any applicant until the Department of Justice completes its check of the state criminal history file as provided by law. iLEAD shall also request subsequent arrest notification from the Department of Justice and take all necessary action based upon such further notification to the extent permitted by law.

Employee Services and/or the Administration shall, on a case-by-case basis, determine whether a volunteer will have more than limited contact with pupils or consider other factors requiring a criminal background check for such a volunteer.

## EMPLOYEE-STUDENT RELATIONS POLICY

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### BOUNDARIES DEFINED

For the purposes of this policy, the term “Boundaries” is defined as acceptable professional behavior by employees while interacting with a student. Trespassing beyond the Boundaries in interactions with students is deemed an abuse of power and a betrayal of public trust.

### UNACCEPTABLE AND ACCEPTABLE BEHAVIOR

Some activities may seem innocent from an employee’s perspective, but some of these can be perceived as flirtation or sexual insinuation from a student or parental point of view. The purpose of the following lists of acceptable and unacceptable behaviors is not to restrain innocent, positive relationships between employees and students but to prevent relationships that could lead to, or may be perceived as inappropriate, sexual misconduct, or “grooming.” Grooming is defined as an act or series of acts by a sexual predator to gain physical and/or emotional control by gaining trust (of staff and/or family and a minor) and desensitizing the minor to various forms of touching and other intimate interaction.

Employees must understand their own responsibilities for ensuring that they do not cross the Boundaries as written in this policy. If a student specifically requests that he or she not be touched, then that request must be honored. Violations could subject the staff member to discipline up to and including termination. Disagreeing with the wording or intent of the established Boundaries will be considered irrelevant for any required disciplinary purposes. Thus, it is critical that all employees study this policy thoroughly and apply its spirit and intent in their daily activities. Although sincere, professional interaction with students fosters ~~the charter~~ iLEAD's mission of academic excellence, employee-student interaction has Boundaries regarding the activities, locations, and intentions.

The following is an illustrative list of unacceptable behavior, which includes, but is not limited to:

- Giving gifts to an individual student that are of a personal and intimate nature (including photographs); or items such as money, food, outings, electronics, etc. without the written pre-approval of the Chief Executive Officer or the Executive Director. It is recommended that any such gifts be filtered through the Chief Executive Officer or the Executive Director along with the rationale therefor.
- Kissing of ANY kind
- Massage (Note: Prohibited in athletics unless provided by massage therapist or other certified professional in an open public location. Coaches may not perform massage or rub-down. Permitted in special education only as instructed under an IEP or 504 plan.)
- Full frontal or rear hugs and lengthy embraces
- Sitting students on one's lap (grades 3 and above)
- Touching buttocks, thighs, chest or genital area
- Wrestling with students or other staff member except in the context of a formal wrestling program
- Tickling or piggyback rides
- Any form of sexual contact
- Any type of unnecessary physical contact with a student in a private situation
- Intentionally being alone with a student away from iLEAD
- Furnishing alcohol, tobacco products, or drugs to a student or failing to report knowledge of such items
- "Dating" or "going out with" a student
- Remarks about physical attributes or physiological development of anyone. This includes comments such as "Looking fine!" or "Check out that [body part]."
- Taking photographs or videos of students for personal use or posting online

- Undressing in front of a student
- Leaving campus alone with a student
- Sharing a bed, mat, or sleeping bag with a student
- Making, or participating in, sexually inappropriate comments
- Sexual jokes or jokes/comments with sexual double entendre
- Seeking emotional involvement (which can include intimate attachment) with a student beyond the normative care and concern required of an educator or caretaker
- Listening to or telling stories that are sexually oriented
- Discussing inappropriate personal troubles or intimate issues with a student
- Becoming involved with a student so that a reasonable person may suspect inappropriate behavior
- Giving students a ride to/from iLEAD or school activities without the express, advance written permission of the Chief Executive Officer or the Executive Director and the student's parent or legal guardian
- Being alone in a room with a student iLEAD with the door closed
- Allowing students in your home without signed parent permission for a preplanned and precommunicated educational activity that must include the presence of another educator, parent, or other designated school volunteer
- Excessive attention toward a particular student
- Sending e-mails, text messages, instant messages, social media messages, or letters to students if the content is not about iLEAD activities and not in accordance with applicable iLEAD policies or in violation of iLEAD's Social Media Policy
- Being "friends" with a student on any personal or non- iLEAD social media website
- Communicating with students or parents/guardians in violation of iLEAD's Social Media Policy
- Engaging in inappropriate and/or unprofessional communications with students on iLEAD's social media
- Using profanity with or to a student
- Involving students in non-educational or non-school related issues, including, but not limited to, the employee's employment issues

The following is an illustrative list of acceptable and recommended behavior, which includes, but is not limited to:



- Pats on the shoulder or back
- Side hugs
- Handshakes
- “High-fives” and hand slapping
- When age appropriate, touching face to check temperature, wipe away a tear, remove hair from face, or other similar types of contact
- Placing TK through second grade students on one’s lap for purposes of comforting the child for a short duration only
- Holding hands while walking with small children or children with significant disabilities
- Assisting with toileting of small or disabled children in view of another staff member
- Touch required under an IEP or 504 Plan
- Reasonable restraint of a violent person to protect self, others, or property
- Obtaining parents’ written consent for any after- school activity on or off campus (exclusive of tutorials)
- Obtaining formal approval (iLEAD and parental) to take students off iLEAD’s property for activities such as field trips or competitions including parent’s written permission and waiver form for any sponsored after-school activity whether on or off campus
- E-mails, text messages, phone conversations, and other communications to and with students must be professional and pertain to iLEAD activities or classes, and communication should be initiated via iLEAD-based technology and equipment
- Keeping the door wide open when alone with a student
- Keeping reasonable and appropriate space between you and students
- Stopping and correcting students if they cross your own personal boundaries
- Keeping parents informed when a significant issue develops about a student
- Keeping after-class discussions with a student professional and brief
- Asking for advice from senior staff or administrators (such as Employee Services) if you find yourself in a difficult situation related to Boundaries
- Involving your supervisor if conflict arises with a student

- Informing Employee Services about situations that have the potential to become more severe (including but not limited to: grooming or other red flag behaviors observed in colleagues, written material that is disturbing, or a student's fixation on an adult)
- Making detailed notes about an incident that could evolve into a more serious situation later
- Recognizing the responsibility to stop unacceptable behavior of students and/or coworkers
- Asking another employee to be present if you will be alone with any student who may have severe social or emotional challenges
- Asking another employee to be present, or within close supervisory distance, when you must be alone with a student
- Giving students praise and recognition without touching them in questionable areas; ~~giving appropriate pats on the back, high five's, and handshakes~~
- Keeping your professional conduct a high priority during all moments of student contact
- Asking yourself if any of your actions that go contrary to these provisions are worth sacrificing your job, your career, and the reputation of iLEAD

This policy does not prevent: 1) touching a student for the purpose of guiding them along a physical path; 2) helping them up after a fall; or 3) engaging in a rescue or the application of Cardio Pulmonary Resuscitation (CPR) or other emergency first-aid. Nor does it prohibit the use of reasonable force and touching in self-defense or in the defense of another. Restraining a child who is trying to engage in violent or inappropriate behavior is also allowed. Only such force as necessary to defend one's self, another person, or the child or to protect property is legally permitted. Excessive force is prohibited.

## REPORTING VIOLATIONS

When any employee, ~~parent, or student~~ becomes aware of an employee having crossed the Boundaries specified in this policy, he or she must promptly report the suspicion to Employee Services. If the allegation also constitutes a reportable event under California Penal Code section 11666, the employee shall comply with the requirements under California Penal Code section 11166. All reports shall be kept as confidential as possible. Prompt reporting is essential to protect students, the suspected employee, any witnesses, and iLEAD as a whole. Employees must also report to the Administration any awareness of, or concern about, student behavior that crosses Boundaries or any situation in which a student appears to be at risk for sexual abuse.

## INVESTIGATING

Employee Services will promptly investigate any allegation of a violation of the Employee-Student Relations Policy, using such support staff or outside assistance as ~~he or she deems deemed~~ necessary and appropriate under the circumstances. ~~unless the allegation also constitutes a reportable allegation under California Penal Code section 11166. In the event the allegation also constitutes such a reportable allegation under California Penal Code section~~

~~11666, Employee Services shall comply with the legal requirements of immediately reporting the allegation to a child protective agency and shall follow up such report with a written report with thirty-six (36) hours.~~

~~If the allegation is only a violation of the Employee Student Relations Policy, but not a violation of California Penal Code section 11166, Employee Services or other appropriate administrator shall conduct an investigation as set forth above.~~ Throughout this fact-finding process, the investigating administrator, and all others privy to the investigation, will protect the privacy interests of any affected student(s) and/or employee(s), including any potential witnesses, to the fullest extent possible.

## VIOLATIONS

Violations of this policy may result in disciplinary action, up to and including termination. When appropriate, violations of this policy may also be reported to authorities for potential legal action.

## CHILD ~~NEGLECT AND ABUSE~~ OR NEGLECT REPORTING

~~iLEAD If, within your professional capacity or within the scope of your employment, you observe or gain possession of knowledge that a child has been a victim of child abuse or sexual abuse or neglect, or you reasonably suspect it, California Penal Code section 11166 requires you to immediately report this information or suspicion to a child protective agency or the police.~~ An employee who knows or reasonably suspects a child has been the victim of child abuse or neglect shall report the instance to the Los Angeles County Department of Children and Family Services (800) 540-4000 <http://dcfs.co.la.ca.us/contactus/childabuse.html>. If the circumstance falls under a different county, please call (800) 540-4000 and request contact information for the appropriate county. The phone call is to be followed by a written report prepared by the employee within thirty-six (36) hours, which may be sent by fax or electronically. ~~There is no duty for the reporter to~~ The reporter should not contact the child's parents. ~~Child abuse is broadly defined as "a physical injury that is inflicted by other than accidental means on a child by another person."~~ iLEAD employees are required to report instances of child abuse or neglect when the employee has a "reasonable suspicion" that child abuse or neglect has occurred. Reasonable suspicion ~~arises when the facts surrounding the incident or suspicion could cause a reasonable person in a like position to suspect child abuse or neglect means that it is objectively reasonable for a person to entertain a suspicion, based upon facts that could cause a reasonable person in a like position, drawing, when appropriate, on the person's training and experience, to suspect child abuse or neglect.~~ It does not require certainty that child abuse or neglect has occurred nor does it require a specific medical indication of child abuse or neglect.

<sup>2</sup>Reporting the information regarding a case of possible child abuse or neglect to your supervisor, an iLEAD Director, an iLEAD counselor, coworker or other person shall not be a substitute for making a mandated report to **The Los Angeles County Department of Children and Family Services**. In addition, employees must also complete annual training as required by law. Employees who have any questions about these reporting requirements should contact Employee Services.

## DRUG AND ~~A~~LCOHOL FREE WORKPLACE

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Our employees are our most valuable resource, and we are committed to providing a safe working environment to protect our employees and others, and to minimize the risk of accidents and injuries. It is iLEAD's policy to maintain a drug and alcohol free workplace. No employee may use, possess, offer for sale or be under the influence of any illegal drugs or alcohol during working hours, including lunch and break periods, in the presence of pupils, at an iLEAD-related event or function, or on iLEAD property at any time. It is expected that all employees will assist in maintaining a work environment free from the effects of alcohol, illegal drugs or other intoxicating substances.

For purposes of this policy, "illegal drugs" includes, but is not limited to, substances that are prohibited by law (such as cocaine, heroin, etc.), controlled substances, and prescription drugs (if they are not prescribed for the person using them and/or not being used as prescribed). "Marijuana" means and includes medical marijuana, marijuana vaping or other recreational marijuana use. "Drug paraphernalia" means any accessory for the use, possession, manufacture, distribution, dispensation, purchase, or sale of illegal drugs. "Under the influence" means that the employee is affected by alcohol, prescription medication that impairs cognitive or physical functions, marijuana and/or illegal drugs in any detectable manner.

iLEAD prohibits the following:

- Use, possession, purchase, or offer for sale of illegal drugs, marijuana, drug paraphernalia or alcohol during working hours, including meal and break periods, or in the presence of pupils;
- Use, possession, purchase, or offer for sale of illegal drugs, marijuana, drug paraphernalia, or alcohol on School property at any time;
- Use, possession, purchase, or offer for sale of illegal drugs, marijuana, drug paraphernalia, or alcohol while attending a School function or event;
- Storing alcohol (if unauthorized), illegal drugs, marijuana or drug paraphernalia in a locker, desk, automobile, or other repository on the School's premises;
- Refusing to submit to an inspection or testing when requested by the School;
- Being under the influence of illegal drugs, marijuana, prescription medication that impairs cognitive or physical functions and/or alcohol during working hours, while on the School's premises and/or attending a School function or event;
- Conviction under any criminal drug statute for a violation occurring in the workplace; or
- Failure to keep all prescribed medicine in its original container.

Engaging in any of the activities above shall be considered a violation of iLEAD's policy and the violator will be subject to discipline, up to and including termination. iLEAD complies with all federal and state laws and regulations regarding drug use while on the job.

This policy will not be construed to prohibit the use of alcohol at social or business functions sponsored by iLEAD where alcohol is served or while entertaining donors and prospective donors of iLEAD. However, employees must remember their obligation to conduct themselves appropriately at all times while at iLEAD-sponsored functions or while representing iLEAD.

Any employee who is convicted of a violation of any criminal drug statute for a violation occurring in the workplace shall notify iLEAD no later than five days after such conviction.

## **PRESCRIPTION DRUGS**

The proper use of medication prescribed by your physician is not prohibited; however, we do prohibit the misuse of prescribed medication. Employees' prescription drug use or nonprescription medication may affect their job performance, such as by causing dizziness or drowsiness. It is the employee's responsibility to determine from his/her physician whether a prescribed drug may impair safe job performance and to notify a supervisor of any job restrictions that should be observed as a result. An employee is not required to reveal the name of the medication or the underlying medical condition. If you are required to take any kind of prescription or nonprescription medication that will affect your ability to perform your job, you are required to report this to Employee Services. Employee Services will determine if it is necessary to temporarily place you on another assignment or take other action as appropriate to protect your safety and the safety of other employees and students.

## **DRUG TESTING**

iLEAD may require a test by intoxilator, blood test, urinalysis, medical examination, or other drug/alcohol screening of those persons whom iLEAD reasonably suspects of using, possessing, or being under the influence of an illegal drug or alcohol. Such testing will be conducted if two or more employees observe an employee acting in such a manner to raise suspicion that the employee is under the influence of an illegal drug, marijuana or alcohol or is acting in such manner that they may harm themselves or another employee or students.

Any refusal to submit to such testing will be considered a positive screen. An employee's consent to submit to such a test is required as a condition of employment, and an employee's refusal to consent may result in disciplinary action, including termination for a first refusal or any subsequent refusal. iLEAD shall determine the manner in which such testing is conducted with the goal being to ensure that the test results are accurate.

Such a test may be required of employees involved in any work-related accident or unsafe practice where the safety of the employee ~~of~~ other employees ~~was-were~~ jeopardized. Periodic retesting may also be required following positive test results or after any violation of this policy or rehabilitation.

## **COUNSELING AND REHABILITATION**

Employees should be aware that participation in a rehabilitation program will not necessarily prevent the imposition of disciplinary action, including termination, for violation of this policy. Employees who undergo voluntary counseling or treatment and who continue to work, if any, must meet all established standards of conduct and job performance.

Compliance with this Drug and Alcohol Abuse Policy is a condition of employment at iLEAD. Failure or refusal of an employee to cooperate fully, sign any required document, submit to any inspection, or follow any prescribed course of substance abuse treatment will result in discipline, up to and including termination.

Because the use, sale, purchase, possession, or furnishing of an illegally obtained substance is a violation of the law, iLEAD may report such illegal drug activities to an appropriate law enforcement agency.

## HEALTH, SAFETY AND SECURITY POLICIES

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iLEAD is committed to providing and maintaining a healthy and safe work environment for all employees. Accordingly, iLEAD has instituted an Injury and Illness Prevention Program designed to protect the health and safety of all personnel. The Injury and Illness Prevention Program is kept by the Administration and is available for your review.

All employees are expected to know and comply with iLEAD's general safety rules and to follow safe and healthy work practices at all times. Please immediately report to your supervisor any potential health or safety hazards and all injuries or accidents.

In compliance with Proposition 65, iLEAD will inform all employees of any known exposure to a chemical known to cause cancer or reproductive toxicity.

iLEAD has also developed guidelines to help maintain a secure workplace. It is important for all employees to be aware of unknown persons loitering in parking areas, walkways, entrances, exits and service areas. Report any suspicious persons or activities to security personnel or to your supervisor. Secure your desk or office at the end of the day. When called away from your work area for an extended length of time, do not leave valuable or personal articles around your workstation that may be accessible. You should immediately notify your supervisor when keys are missing or if security access codes, identification materials, or passes have been breached. The security of the facilities, as well as the welfare of our employees and our students, depends upon the alertness and sensitivity of every individual.

### EMPLOYEES WHO ARE REQUIRED TO DRIVE

Employees who are required to drive their own vehicle on approved iLEAD business will be required to show proof of a current, valid license and proof of current, effective insurance coverage. To the extent permitted by law, iLEAD retains the right to transfer to an alternative position, suspend, or terminate an employee whose license is revoked or who fails to maintain personal automobile insurance coverage. Employees who drive their own vehicles on approved iLEAD business will be reimbursed at the per mile rate established by the Internal Revenue Service. As a condition of employment, employees who drive their own vehicle on approved iLEAD business are required to use good judgment.

Pursuant to applicable law and safety standards, employees whose job responsibilities include regular or occasional driving and who are issued a cell phone for business use must refrain from using their phone while driving unless

they are using a hands-free device. Safety must come before all other concerns. Thus, unless an employee is using a hands-free device in a safe-manner, he or she must safely pull off to the side of the road and safely stop the vehicle before placing, accepting, or continuing a call. Sending or reviewing text messages while driving is also prohibited.

Employees whose job responsibilities do not specifically include driving as an essential function, but who use a cell phone for business purposes, whether issued by iLEAD or not, are also expected to abide by the provisions above. Under no circumstances are employees allowed to place themselves, students, or others at risk to fulfill business needs.

Any employee who fails to comply with this policy will be deemed to have engaged in grossly negligent conduct beyond the course and scope of his or her employment. As a result, any employee who is charged with a traffic violation or incurs any other form of liability resulting from a violation of this policy will, to the extent allowed by applicable law, be solely responsible for any such liability.

Violations of this policy will be subject to disciplinary action, up to and including termination.

## SMOKING

All School buildings and facilities are non-smoking facilities. Smoking is prohibited on the School's premises or within twenty (20) feet of a School building and within 25 feet of a school playground, whichever is farther. This includes, but is not limited to, nicotine and non-nicotine cigarettes including herbal cigarettes and marijuana, cigars, pipes as well as e-cigarettes and vaping. Employees who wish to smoke must limit their smoking to tobacco products during meal and rest periods off premises.

## HOUSEKEEPING

iLEAD strives for a clean, safe and sanitary environment. All employees are expected to keep the premises orderly and to clean up after themselves, which includes leaving their work areas, common areas, the kitchen and the refrigerator neat and clean. Employees who work in open areas should not eat at their desks.

## PARKING

Employees may use iLEAD parking facilities as may be available and as directed by iLEAD. iLEAD is not responsible for any loss or damage to employee vehicles or contents while parked on School property.

## iLEAD PROPERTY & INSPECTIONS

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iLEAD is committed to providing a work environment that is safe and free of illegal drugs, alcohol, firearms, explosives and other improper materials. Additionally, iLEAD provides property and facilities to its employees to carry out business on behalf of iLEAD. Desks, files, copiers, storage areas, work stations, file cabinets, lockers, and supplies, both office and household, are iLEAD property and must be maintained according to iLEAD rules and regulations. They must be kept clean and are to be used only for work-related purposes. Accordingly, employees do not have a reasonable expectation of privacy when using any iLEAD property or facilities. In accordance with



these policies, all iLEAD facilities and property may be inspected by iLEAD at any time, with or without prior notice to the employee. iLEAD reserves the right to deny entry to any person who refuses to cooperate with any inspections by iLEAD. Any employee who fails to cooperate with inspections may be subject to disciplinary action, up to and including dismissal.

Prior authorization must be obtained before any iLEAD property may be removed from any iLEAD premises. All iLEAD property must be immediately returned upon request, when employee is on an extended leave of absence, and/or upon termination of the employment relationship.

For security reasons, employees should not leave personal belongings of value in the workplace. Employees are responsible for the security of their personal belongings. ~~The~~ iLEAD is not responsible for any lost or stolen personal items at work, on iLEAD premises, or during iLEAD-related functions.

Terminated employees should remove any personal items at the time they leave the iLEAD. Personal items left in the workplace by previous employees are subject to disposal if not claimed at the time of the employee's termination, unless the parties have arranged otherwise.

## SOLICITING/CONDUCTING PERSONAL BUSINESS WHILE ON DUTY

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In order to maintain and promote efficient operations, discipline, and security, iLEAD maintains rules applicable to all employees that govern solicitation, distribution of written material, and entry onto the premises and work areas. All employees are expected to comply with these rules, which will be strictly enforced. Any employee who is in doubt concerning the application of these rules should immediately consult with his or her supervisor. These rules are:

1. No employee shall sell merchandise or solicit or promote support for any cause or organization during his or her working time or during the working time of the employee(s) at whom such activity is directed. As used in these rules, working time excludes meal and break periods.
2. No employee shall distribute or circulate any written or printed material, other than those approved by management for business purposes, in work areas at any time or during his or her working time or during the working time of the employee(s) at whom such activity is directed.
3. No employee shall enter or remain in iLEAD work areas for any purpose except to report for, be present during, and conclude a work period. Non-exempt employees must not begin work and clock in at his or her working area more than 10 minutes before they are scheduled to begin and must stop work and clock out from his or her work area no later than 10 minutes after their work scheduled for the day is completed. Work area does not include iLEAD parking lots, gates, or other similar outside areas unless an employee is assigned to work in such areas.
4. Under no circumstances will non-employees be permitted to solicit or distribute written material for any purpose on iLEAD property.



5. Non-employees must sign in at the front office before entering iLEAD property.

Violations of this policy may result in disciplinary action, up to and including termination.

## USE OF iLEAD COMMUNICATION EQUIPMENT AND TECHNOLOGY

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iLEAD has a commitment to protect our employees and our students. One of the ways to protect our employees and students is to monitor and limit technology use within safe boundaries.

iLEAD's electronic communications systems ("Communications Systems") includes, but is not limited to, computers, laptops, e-mail, telephones, cellular phones, tablets, PDAs, text messaging, instant messaging, video conferencing, voice mail, facsimiles, and connections to the Internet and other internal or external networks. All iLEAD-owned Communications Systems remain the property of iLEAD and are provided to the employee to carry out business on behalf of iLEAD, unless previously authorized for non-business use. Employees have no expectation of privacy in any communications made using iLEAD owned equipment and technology. Communications (including any attached message or data) made using iLEAD owned communications equipment and technology are subject to review, inspection and monitoring at any time by iLEAD. All communications and information transmitted by, received from, or stored in these systems are iLEAD records and the property of iLEAD.

Electronic communications are a means of business communication. iLEAD requires all users to conduct themselves in a professional manner. Users should conduct all electronic communications with the same care, judgment, and responsibility that they would use when sending letters or memoranda written on iLEAD letterhead. Special care must be taken when posting any information on the Internet because of the potentially broad distribution of and access to such information.

Protecting our students and the children at iLEAD is one of our top priorities. In order to do so, iLEAD uses technology protection measures that protect against Internet access (by both minors and adults) to visual depictions that are obscene, child pornography and/or with respect to use by minors, images harmful to minors. These measures may include, but are not limited to, installing a blocking system to block specific internet sites, setting Internet browsers to block access to adult sites, using a filtering system that will filter all Internet traffic and report potential instances of misuse and using a spam filter.

Employees are required to safeguard their passwords to limit unauthorized use of computers by minors in accordance with the Student Internet Use Policy and Agreement. The use of passwords to limit access to these systems is only intended to prevent unauthorized access to voice mail, e-mail, and computer systems, files, and records. Additionally, these systems are subject to inspection, search, and/or monitoring by iLEAD ~~personnel~~ for any number of ~~business~~ reasons. As a result, employees do not have an expectation of privacy in this regard. Employees ~~that who~~ do not safeguard their passwords from unauthorized student use, or that allow a student to access computers in violation of the Student Internet Use Policy and Agreement, will be subject to discipline, up to and including termination.

## PROHIBITED USE

The Communications Systems is provided solely for the purpose of conducting iLEAD business. Incidental and occasional personal use of the Communications Systems is permitted, but such communications must not disrupt iLEAD business, and users do not have any expectation of personal privacy in any matters stored in, created, received, or sent over the Communications Systems. Users must respect all copyrights and licenses to software and other online information, and may not upload, download, or copy software or other material through the Communications Systems without the appropriate prior written authorization. Employees are not permitted to use iLEAD's Communications Systems to view visual images that are obscene, child pornography and/or images harmful to minors.

The e-mail system and Internet access is not to be used in any way that may be disruptive, harassing or offensive to others, illegal or harmful to morale. Users of the Communications Systems are strictly prohibited from using the Communications Systems to deliver a message that is harassing or offensive on the basis of a ~~P~~protected ~~C~~category as defined in the Discrimination, Unlawful Harassment, Retaliation and Complaint Procedures policy herein or any other consideration made unlawful by federal, state, or local laws, ordinances, or regulations. iLEAD has policies against discrimination, harassment, and retaliation, and those policies apply to the use of the Communications Systems. Users are also prohibited from using the Communications Systems for transmitting or making accessible annoying, offensive, defamatory, or harassing material or intentionally damaging or violating the privacy of information of others.

The e-mail system and Internet access is not to be used in any manner that is against the policies of iLEAD, contrary to the best interest of iLEAD or for personal gain or profit of the employee against the interests of iLEAD. Employees must not use iLEAD's communications equipment and technology for the unauthorized disclosure, use and dissemination of personal information regarding students.

Users must not alter, copy, transmit, or remove iLEAD information, proprietary software, or other files without proper authorization from iLEAD.

Employees should not attempt to gain access to another employee's e-mail files or voicemail messages without the latter employee's express permission. Each employee is responsible for the content of the messages sent out ~~tr~~ using ~~his/her~~ iLEAD's ~~issued equipment~~ Communications Systems. It is strictly prohibited to use ~~any another employee's computer~~ Communications Systems assigned to another employee to send messages to create the appearance that they are from that employee, unless the latter employee expressly authorizes such use. Anyone who receives an electronic communication for which he or she is not the intended recipient must immediately inform the sender that the message was sent improperly and must delete the message from their e-mail and voice mail mailboxes.

## CONFIDENTIALITY AND PRIVILEGES

Information stored on the Communications Systems is intended to be kept confidential within iLEAD. iLEAD has taken all reasonable steps to assure confidentiality and security. Like other means of communication, however, it is not possible to guarantee complete security of electronic communications either within or outside iLEAD, and care should be exercised when sending or receiving sensitive, privileged, or confidential information electronically. For example, information sent through the Internet can be monitored by external systems en route to its final

destination. All users must keep this in mind when forwarding sensitive, confidential, and/or privileged information. Where appropriate, this fact should be disclosed to outside contacts.

## ACCESS AND DISCLOSURE

iLEAD, as owner of the Communications Systems, to protect the integrity of its systems from unauthorized or improper use, reserves the right ~~for legitimate business reasons~~, upon authorization of the Administration, to monitor, access, retrieve, download, copy, listen to, or delete anything stored in, created, received, or sent over its Communications Systems without the permission of or prior notice to any user.

Although iLEAD entrusts you with the use of voice mail, e-mail, computer files, software, or similar iLEAD property, you should keep in mind that these items have been installed and maintained at great expense to iLEAD and are only intended for business purposes. At all times, they remain iLEAD property. Likewise, all records, files, software, and electronic communications contained in these systems also are iLEAD property. You are advised that electronic files, records, and communications on iLEAD computer systems, electronic communication systems, or through the use of iLEAD telecommunications equipment are not private. Although they are a confidential part of iLEAD property, you should not use this equipment or these systems for confidential messages. The use of passwords to limit access to these systems is only intended to prevent unauthorized access to voice mail, e-mail, and computer systems, files, and records. Additionally, these systems are subject to inspection, search, and/or monitoring by iLEAD ~~personnel~~ for any number of ~~business~~ reasons. As a result, employees do not have an expectation of privacy in this regard. Accordingly, these systems and equipment should not be used to transmit personal messages, except in necessary situations or when exceptions are specifically sanctioned by management. Voice mail messages and e-mail messages should be routinely deleted when no longer needed. iLEAD is not responsible for costs incurred when employees use iLEAD telephones or e-mail systems for personal matters.

You should be advised to use voice mail and e-mail as cautiously as you would use any more permanent communication medium such as a memorandum or letter. You should realize that e-mail messages:

- May be saved and read by third parties.
- May be retrieved even after “deletion.”
- May be accessed by authorized service personnel.
- May be examined by management without notice ~~for business purposes~~.

There will be times when iLEAD, in order to conduct business, will utilize its ability to access your e-mail, voice mail, computer files, software, or other iLEAD property. iLEAD also may inspect the contents of your voice mail, e-mail, computers, computer files, or software to monitor job performance, for training or quality control purposes, or when iLEAD suspects that iLEAD property is being used in an unauthorized manner.

iLEAD reserves the right to use and disclose any electronic communication on its Communications Systems without the permission of or any prior notice to any user, including disclosure to law enforcement officials.

## DISCIPLINE FOR VIOLATIONS OF POLICY

Any person who discovers misuse of the Internet access or any of iLEAD's Communications Systems should immediately contact Employee Services. Any user who violates any part of this policy will be subject to discipline, up to and including immediate termination.

## POLICY MAY BE AMENDED AT ANY TIME

The pace of technological change and growth in electronic communications is rapid. This policy applies to all present and future electronic communications systems and devices and to improvements and innovations to existing systems and devices and to completely new technologies, devices, and systems. iLEAD reserves the right to amend this policy at any time ~~at any time through an authorized writing from an authorized iLEAD representative~~.

## EMPLOYEE BLOGS AND SOCIAL NETWORKING

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### SCOPE

In light of the explosive growth and popularity of social media technology in today's society, iLEAD has developed the following policy to establish rules and guidelines regarding the appropriate use of social media by employees. This policy applies to situations when you: (1) make a post to a social media platform that is related to iLEAD; (2) engage in social media activities during working hours; (3) use iLEAD equipment or resources while engaging in social media activities; (4) use your iLEAD e-mail address to make a post to a social media platform; (5) post in a manner that reveals your affiliation with iLEAD; or (6) interact with iLEAD students or parents/guardians of iLEAD students ~~iLEAD~~ on the Internet and on social media sites.

For the purposes of this policy, the phrase "social media" refers to the use of a website or other electronic application to connect with other people, including, but not limited to, Facebook, Twitter, Pinterest, LinkedIn, YouTube, Instagram, and Snap Chat, as well as related web-based media, such as blogs, wikis, and any other form of user-generated media or web-based discussion forums. Social media may be accessed through a variety of electronic devices, including computers, cell phones, smart phones, PDAs, tablets, and other similar devices.

This policy is intended to supplement, not replace, iLEAD's other policies, rules, and standards of conduct. For example, iLEAD policies on confidentiality, use of iLEAD equipment, professionalism, employee references and background checks, workplace violence, unlawful harassment, and other rules of conduct are not affected by this policy.

You are required to comply with all iLEAD policies whenever your social media activities may involve or implicate iLEAD in any way, including, but not limited to, the policies contained in this ~~Handbook~~ Guidebook.

### STANDARDS OF CONDUCT

You are required to comply with the following rules and guidelines when participating in social media activities that are governed by this policy:

- Comply with the law at all times. Do not post any information or engage in any social media activity that may violate applicable local, state, or federal laws or regulations.
- Do not engage in any discriminatory, harassing, or retaliatory behavior in violation of iLEAD policy.
- Respect copyright, fair use, and financial disclosure rules and regulations. Identify all copyrighted or borrowed material with proper citations and/or links.
- Maintain the confidentiality of iLEAD’s trade secrets and private or confidential information. Trade secrets may include information regarding the development of systems, processes, products, know-how, and technology. Do not post internal reports, policies, procedures, or other internal ~~business~~School-related confidential communications. This prohibition applies both during and after your employment with iLEAD.
- Do not post confidential information (as defined in this -HandbookGuidebook) about iLEAD, its employees, or its students. Remember that most student information is protected by the Family Educational Rights and Privacy Act, including any and all information that might identify the student. Publicizing student work and accomplishments is permitted only if appropriate consents are obtained.
- While it is acceptable to engage in limited and incidental social media activities at work, such social media activities may not interfere with your job duties or responsibilities. Do not use your iLEAD-authorized e-mail address to register on social media websites, blogs, or other online tools utilized for personal use.
- Be knowledgeable about and comply with iLEAD’s background check procedures. Do not “research” job candidates on the Internet or social media websites without prior approval from Employee Services.
- Be knowledgeable about and comply with iLEAD’s reference policy. Do not provide employment references for current or former employees, regardless of the substance of such comments, without prior approval from Employee Services.
- We encourage you to be fair and courteous to fellow employees, students, parents, vendors, ~~customers~~, suppliers, or other people who work on behalf of the School. We also encourage you to avoid posting statements, photographs, video, or audio that could be reasonably viewed as malicious, obscene, threatening, or intimidating, that disparage employees, students, parents, vendors, ~~customers~~, suppliers, or other people or organizations who are affiliated with or work on behalf of the School, or that might constitute harassment or bullying.
- Make sure you always try to be honest and accurate when posting information or news, and if you make a mistake, correct it quickly. Please do not post any information or rumors that you know to be false about the School, fellow employees, students, parents, vendors, ~~customers~~, suppliers, people or organizations who are affiliated with or working on behalf of the School, or competitors.
- Never represent yourself as a spokesperson for the School unless authorized to do so. If you publish social media content that may be related to your work or subjects associated with the School, make it

clear that you are not speaking on behalf of the School and that your views do not represent those of the School, fellow employees, students, parents, vendors, ~~customers~~, suppliers, or other people or organizations who are affiliating with or working on behalf of the School. It is best to use a disclaimer such as “The postings on this site are my own and do not necessarily reflect the views of the School.”

- Never be false or misleading with respect to your professional credentials.

## CREATING AND USING iLEAD SOCIAL MEDIA

Employees are only permitted to communicate and connect with students on social media that is owned and operated by iLEAD. Employees are only permitted to communicate and connect with students’ parents or guardians regarding iLEAD-related matters on social media that is owned and operated by iLEAD. All communications with parents or guardians regarding iLEAD-related matters on non-iLEAD or personal social media may result in disciplinary action, up to and including termination. Any communication whatsoever with students on non-iLEAD or personal social media may result in disciplinary action, up to and including termination.

The IT Department, in addition to Employee Services and members of the Administration, are responsible for approving requests for iLEAD social media, monitoring iLEAD social media for inappropriate and unprofessional content, and maintaining the social media account information (including, but not limited to, username and password). iLEAD has final approval over all content and reserves the right to close the social media account at any time, with or without notice. Any inappropriate or unprofessional communications may result in disciplinary action, up to and including termination.

To set up a social media account that is owned and operated by iLEAD in compliance with this policy, employees must adhere to the following procedures:

- Request and obtain permission to create an iLEAD social media account from your supervisor.
- Contact the IT Department to set up the social media account. Provide the IT Department with the username and password that you would like assigned to the account. If you change the username and/or password, you must immediately update this information with the IT Department. Failure to do so may result in disciplinary action, up to and including termination.

Any social media created and/or used in violation of this policy may result in disciplinary action, up to and including termination.

## ACCESS

Employees are reminded that iLEAD’s various electronic communications systems, including, but not limited to, its electronic devices, computers, telephones, e-mail accounts, video conferencing, voice mail, facsimiles, internal and external networks, computers, cell phones, smart phones, PDAs, tablets, and other similar devices, are the property of iLEAD. All communications and information transmitted by, received from, or stored in these systems are iLEAD records.

As a result, iLEAD may, and does, monitor its employees' use of these electronic communication systems, including for social media activities, from time to time. iLEAD may monitor such activities randomly, periodically, and/or in situations when there is reason to believe that someone associated with iLEAD has engaged in a violation of this, or any other, iLEAD policy. As a result, employees do not have a reasonable expectation of privacy in their use of or access to iLEAD's various electronic communications systems.

## DISCIPLINE

Any violation of this Social Media Policy may result in disciplinary action, up to and including immediate termination.

## RETALIATION IS PROHIBITED

iLEAD prohibits retaliation against any employee for reporting a possible violation of this policy or for cooperating in an investigation of a potential violation of this policy. Any employee who retaliates against another employee for reporting a possible violation of this policy or for cooperating in an investigation will be subject to disciplinary action, up to and including termination.

## QUESTIONS

In the event you have any questions about whether a particular social media activity may involve or implicate iLEAD, or may violate this policy, please contact Employee Services.

Social media is in a state of constant evolution, and iLEAD recognizes that there will likely be events or issues that are not addressed in these guidelines. Thus, each iLEAD employee is responsible for using good judgment and seeking guidance, clarification, or authorization before engaging in social media activities that may implicate this policy.

## PARTICIPATION IN RECREATIONAL OR SOCIAL ACTIVITIES

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To encourage teamwork at iLEAD, we encourage participation in recreation and social activities sponsored or supported by iLEAD. Please note that employee participation is strictly voluntary and employees have no obligation to participate in recreational or social activities and no employee has work-related duties requiring such participation. An employee's participation in social and recreational activities is at the employee's own risk and iLEAD disclaims any and all liability arising out of the employee's participation in these activities.

## PERSONNEL FILES AND RECORD KEEPING PROTOCOLS

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At the time of your employment, a personnel file is established for you. iLEAD strives to keep accurate and up to date personnel records. Please keep Employee Services advised of changes that should be reflected in your personnel file. Such changes include: change in name, [home](#) address, [email address](#), telephone number, marital status, number



of dependents and person(s) to notify in case of emergency. Prompt notification of these changes is essential and will enable iLEAD to contact you should the change affect your other records.

You have the right to inspect certain documents in your personnel file, as provided by law, in the presence of an iLEAD representative, at a mutually convenient time. A request for information contained in the personnel file must be in writing and directed to Employee Services.

Current and former employees, or employee representatives, may also request inspection through the use of an iLEAD-provided request form. Please contact Employee Services to schedule a convenient time. You may request copies from your file of all documents. iLEAD may charge the requesting employee or employee representative for the actual cost of reproduction of personnel file documents. If you desire, you may add a written statement to your file explaining any disputed item.

Access to information in personnel files is restricted. Only authorized managers and management personnel will have access to your personnel file. However, iLEAD will cooperate with—and provide access to your personnel file to—law enforcement officials or local, state or federal agencies or as otherwise required in accordance with applicable law.

## HOURS OF WORK, OVERTIME AND ATTENDANCE

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### WORK HOURS AND SCHEDULES

iLEAD's normal working hours are from **8:00 a.m. – 4:30 p.m.**, Monday through Friday. The work schedule for full-time non-exempt employees is normally 40 hours per week. Your supervisor will assign your work schedule. Employees are expected to be punctual and ready to start work at their scheduled time.

### OVERTIME

All non-exempt employees are required to obtain approval from their supervisor prior to working overtime. Failure to obtain such approval may subject an employee to discipline, up to and including termination. Overtime compensation will be paid in accordance with all state and federal laws. Exempt employees are not entitled to overtime pay.

For purposes of calculating overtime, iLEAD's standard workweek begins on Saturday at 12:00 a.m. (midnight) and ends on Friday at 11:59 p.m. iLEAD's standard workday is 12:00 a.m. (midnight) to 11:59 p.m. each day.

Only those hours that are actually worked are counted to determine an employee's overtime pay. Compensated holidays, for example, are not hours worked. Any overtime must be preauthorized in writing by your supervisor.

### MEAL AND REST PERIODS

Meal Periods: All non-exempt employees must take an uninterrupted meal period of at least 30 minutes for each work period in excess of 5 hours in accordance with this policy. Further, all non-exempt employees must take a



second uninterrupted meal period of at least 30 minutes for each work period in excess of 10 hours in accordance with this policy.

Employees must begin their first meal period within five hours of starting work. For example, if the employee begins working at 7:00 a.m., then the employee must clock out to begin his or her meal period no later than 12:00 p.m. (noon). Further, employees must begin their second meal period (if applicable) within ten hours of starting work. For example, if the employee begins working at 7:00 a.m., then the employee must clock out to begin his or her second meal period no later than 5:00 p.m.

An employee whose work period is 5 to 6 hours may waive, in writing, his or her right to a first meal period. Further, an employee may waive his or her right to a second meal period for a work period as long as the employee does not work more than 12 hours and did not waive his or her first meal period for that work period. iLEAD offers written Meal Period Waiver Agreements that govern an employee's entire employment, which are voluntary and may be revoked at any time, to document the employee's waiver of first and second meal periods.

Employees are eligible for the following number of meal periods:

<b>Length of Workday in Hours</b>	<b># of Meal Periods</b>	<b>Explanation</b>
0 to $\leq$ 5	0	An employee who works 5 hours or less in a workday is not entitled to a meal period.
> 5 to $\leq$ 10	1	An employee who works more than 5 hours in a workday, but who does not work more than ten hours in a workday, must take a 30-minute uninterrupted meal period, unless the employee works six or fewer hours and voluntarily waives his or her first meal period.
> 10	2	An employee who works more than ten hours in a workday must take a second uninterrupted 30-minute meal period, unless the employee works 12 or fewer hours, did not waive the first meal period, and voluntarily waives his or her second meal period.

Employees must take their meal periods according to the following schedule:

<b>Which Meal Period</b>	<b>When</b>
First Meal Period	An employee's first meal period must begin within 5 hours of starting work (in other words, by the end of the fifth hour of work or 5 hours and 0 minutes on the clock). By way of example, if an employee clocks in 8:30 a.m., then the employee must clock out and start his or her meal period no later than 1:30 p.m.
Second Meal Period	An employee's second meal period must begin within ten hours of starting work (in other

Which Meal Period	When
	words, by the end of the tenth hour of work or 10 hours and 0 minutes on the clock). By way of example, if an employee clocks in 8:30 a.m., then the employee must clock out and start his or her second meal period no later than 6:30 p.m.

During meal periods, employees are absolutely prohibited from performing work of any kind or any amount. Employees are excused from all duties and are free to leave the premises. Non-exempt employees must record the exact start and stop times of each meal period through iLEAD's timekeeping system so that iLEAD may monitor time records for compliance. Employees may not join together required meal periods to take a longer break.

**Rest Periods:** All non-exempt employees are authorized, permitted, and strongly encouraged to take a 10-minute rest period every 4 hours worked or major fraction thereof. Ordinarily, this amounts to two 10-minute rest periods per 8-hour workday. The first rest period should be taken roughly in the middle of the 4-hour work period prior to lunch, and the second rest period should be taken roughly in the middle of the 4-hour work period following lunch. You do not need to record the times of these rest periods. You will be paid for the time spent on your rest periods.

Employees are eligible for the following number of rest periods:

Length of Work Period in Hours	# of Rest Periods	Explanation
0 to < 3.5	0	An employee whose work period is less than 3.5 hours is not entitled to a rest period.
≥ 3.5 to ≤ 6	1	An employee whose work period is 3.5 hours up to and including 6 hours is eligible to take one rest period.
> 6 to ≤ 10	2	A non-exempt employee whose work period is more than 6 hours up to and including 10 hours is eligible to take two rest periods.
> 10 to ≤ 14	3	A non-exempt employee whose work period is more than 10 hours up to and including 14 hours is eligible to take three rest periods.

During your rest periods, employees are absolutely prohibited from performing work of any kind or any amount. You are excused from all duties. In addition, please understand that you may not join together required rest periods in order to take a longer break. Also, you may not miss a required meal or rest period in order to start work later or leave work earlier.

Any employee who misses a meal or rest period or who experiences a late, short, or interrupted meal period—for any reason—must immediately report this issue to his or her supervisor and complete a Daily Meal Period and Rest Period Reporting Form. The employee must fill out all fields on the form, including providing a thorough

explanation for the non-compliant meal or rest period. The employee must complete and turn in this form to his or her supervisor on the same workday that he or she experienced the non-compliant meal or rest period.

If an employee voluntarily chooses to miss a meal or rest period or take a late, short, or interrupted meal period (e.g., I chose to take my lunch later in the day or I chose to refuse an “authorized” meal period at the time provided by iLEAD), the employee is not entitled to premium pay (one additional hour of pay). If an employee involuntarily experiences a missed meal or rest period or a late, short, or interrupted meal period (e.g., my supervisor asked me to handle a parent call or meeting that caused me to miss or take a late meal period), the employee is entitled to premium pay. Employees must report the reason for the non-compliant meal or rest period on the Daily Meal Period and Rest Period Form.

Non-exempt employees are required to take their meal and rest periods in accordance with this policy. If you encounter any challenges with taking meal or rest periods in accordance with this policy, please immediately contact your supervisor or Employee Services.

Failure to comply with iLEAD’s policy regarding meal and/or rest periods can lead to discipline, up to and including termination.

## LACTATION ACCOMMODATION POLICY

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Employees have the right to reasonable time and access to a private area during the workday to express milk. In compliance with state and federal law, iLEAD provides a supportive environment to enable nursing mothers to express breast milk during the work day.

If the lactation break time cannot run concurrently with rest and meal periods already provided or additional time is needed for the employee, the lactation break time will be unpaid. Where unpaid breaks or additional time are required, the employee should work with Supervisor regarding scheduling and reporting the extra break time as unpaid.

Because exempt employees receive their full salary during weeks in which they work and they are not normally required to identify break and meal times, all exempt employees who need lactation accommodation breaks do not need to report any extra break time as “unpaid.”

A private location to express breast milk will be provided in close proximity to the employee’s work area. The employee’s normal work area may be used if it allows the employee to express milk in private. In certain circumstances, a temporary location, multipurpose room, or shared space may be provided in accordance with applicable law. The location will also meet the following requirements: not be a bathroom; be free from intrusion; be shielded from view; be safe, clean, and free of hazardous materials; contain a surface to place a breast pump and personal items; contain a place to sit; and have access to electricity or alternative devices, including, but not limited to, extension cords or charging stations, needed to operate an electric or battery-powered breast pump. In addition, iLEAD shall provide access to a sink with running water and a refrigerator suitable for storing milk in close proximity to the employee’s work area. If a refrigerator cannot be provided, iLEAD may provide another cooling device

suitable for storing milk, such as an iLEAD-provided cooler. Employees should discuss with Supervisor the location for storage of expressed milk. Employees may also provide their own portable small storage unit or cooler for keeping expressed breast milk cold.

To request the above, please contact Supervisor or Employee Services. iLEAD will respond accordingly, generally within two business days.

If any employee believes that ~~he or she~~they has have experienced retaliation or discrimination as a result of conduct protected by this policy, the employee may file a complaint with ~~his or her~~their supervisor and/or the Labor Commissioner's Office. For more information, contact the Labor Commissioner's Office by phone at 213-897-6595 or visit a local office by finding the nearest one on their website: [www.dir.ca.gov/dlse/DistrictOffices.htm](http://www.dir.ca.gov/dlse/DistrictOffices.htm). The Labor Commissioner's Office provides an interpreter at no cost to the employee, if needed.

## PAY DAYS

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Employees who are paid a predetermined salary will have paydays scheduled on the 15th and the last day of each month. All other employees (i.e., those on an hourly basis, etc.) will have paydays scheduled on the 5<sup>th</sup> and 20<sup>th</sup> of each month (see Employee Services for the schedule). iLEAD reserves the right to modify its payroll practice as it deems necessary. Each paycheck will include earnings for all reported work performed through the end of the payroll period. In the event that a regularly scheduled payday falls on a weekend or holiday, employees will receive their pay on the day of work before the holiday. Employees are required to report any overpayment of wages to the Payroll Department. Any discrepancies or shortages in the calculation of wages should be reported as soon as possible after payday.

## ATTENDANCE POLICY

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iLEAD strives for a healthy and positive work environment. Good attendance and punctuality are an important part of the day-to-day operations. Excessive absenteeism and/or tardiness might place a burden on fellow employees and iLEAD.

Employees are expected to adhere to regular attendance and to be punctual. If you find it necessary to be absent or late, you are expected to arrange it in advance with your supervisor to the extent possible. If it is not possible to arrange your absence or tardiness in advance, you must notify your supervisor no later than one-half hour before the start of your workday or as soon as reasonably practicable, if you are absent or tardy in accordance with iLEAD's sick leave policy. Because voice mail messages may go unheard for significant periods of time, leaving a voice mail message is not a sufficient method of notifying your supervisor—you must personally contact your supervisor in a timely manner. If you are required to leave work early, you must also personally contact your supervisor and obtain his or her permission.

If you are a teacher and need a substitute for any absence other than those taken under iLEAD's sick leave policy, you are responsible for communicating with the designated contact for your specific site and submitting a request for the designee to arrange for a substitute. This request must be submitted in advance. If you are absent from work longer than one day please communicate this with your supervisor or designated contact.

Excessive unexcused absenteeism and tardiness will not be tolerated and will lead to disciplinary action, up to and including termination. Except as otherwise provided by law, if you fail to report for work without any notification to your supervisor and your absence continues for a period of three consecutively scheduled workdays, iLEAD will, in most cases, consider that you have abandoned your employment and have voluntarily resigned.

## TIME RECORDS

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To ensure compliance with all applicable laws, non-exempt employees must accurately record all hours worked. This means non-exempt employees must record their time whenever they begin, cease, or resume working during the course of a workday. While you need not record when you begin or end your rest periods, you must record when you begin and end your meal periods. Under no circumstances may one employee record time for another employee. Exempt employees may also be expected to record their time worked and report absences from work due to personal needs or illness as directed.

If instructed by your supervisor, you will be expected to record time worked on a timesheet for each pay period. Recording inaccurate time on your timesheet or recording time on another employee's time sheet is a violation of iLEAD policy and may result in discipline, including immediate termination. Employees are strictly prohibited from working "off the clock" or failing to record all time worked. Falsification of any timecard may result in disciplinary action, up to and including termination.

## PROFESSIONAL ~~DEVELOPMENT~~ LEARNING

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As a commitment to our team's professional growth, iLEAD holds minimum days on Fridays to allow for professional learning development, collaboration opportunities and meetings. All ~~full-time salaried~~ staff, including ~~Facilitator~~teachers, Care Team, Student Support, etc. ~~is-are~~ required to attend the meetings and/or work days that apply. If a staff member is unable to attend, they must submit an absence claim form to gain approval for their absence. Various professional learning development opportunities will be offered throughout the year. ~~Teaching~~ Sstaff is required to attend all professional learning development opportunities prior to the start of the school year. ~~Teaching~~ Sstaff is encouraged to visit other charter schools (as appropriate), attend applicable conferences, and conduct a research activity/presentation and other approved professional learning development activities.

# STANDARDS OF CONDUCT

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## PERSONAL APPEARANCE

iLEAD encourages all employees to maintain professionalism in appearance and in behavior. Employees are expected to wear clothes that are neat, clean and professional while on duty. Employees are expected to appear well groomed and appear within professionally accepted standards suitable for the employee's position, and must at all time wear shoes. Your supervisor will inform you of any specific dress requirements for your position.

## PROHIBITED CONDUCT

iLEAD expects that all employees will conduct themselves in a professional and courteous manner while on duty. Employees engaging in misconduct will be subject to disciplinary action up to and including termination of employment. The following is a list of conduct that is prohibited by iLEAD. This list is not exhaustive and is intended only to provide you with examples of the type of conduct that will not be tolerated by iLEAD.

- Unexcused absence and/or lack of punctuality
- Release of confidential information without authorization
- Violation of iLEAD's Drug and Alcohol Free Workplace policy
- Theft or embezzlement
- Willful destruction of property
- Falsification, fraud or omission of pertinent information when applying for a position
- Any willful act that endangers the safety, health or wellbeing of another individual
- Horseplay
- Any act of sufficient magnitude to cause disruption of work or gross discredit to iLEAD
- Misuse of iLEAD property or funds
- Possession of firearms, or any other dangerous weapon, while acting within the course and scope of your employment with iLEAD
- Acts of discrimination or unlawful harassment based on gender, ethnicity or any other basis protected by applicable law or policies
- Failure to comply with iLEAD's safety procedures
- Insubordination such as a failure to follow a supervisor's legitimate and legal direction.
- Failure to follow any known policy or procedure of iLEAD or gross negligence that results in a loss to iLEAD
- Violations of federal, state or local laws affecting the organization or your employment with the organization
- Unacceptable job performance
- Dishonesty
- Failure to keep a required license, certification or permit current and in good standing
- Recording the work time of any other employee, or allowing any other employee to record time on your time record or falsifying any time record
- Poor attendance, including, but not limited to, habitual tardiness and/or absenteeism, leaving early without permission, absence from work without permission, and abuse of time during work hours, to the extent permitted by law.

- Unauthorized use of iLEAD equipment, materials, time or property
- Working unauthorized overtime or refusing to work assigned overtime
- Failure to take meal and/or work breaks
- Intentionally supplying false information in order to obtain a leave of absence or other benefits from iLEAD.
- Sleeping or malingering on the job
- Unfit for service, including the inability to appropriately instruct or associate with students.
- Performing unauthorized work on iLEAD time.
- Unauthorized use of cameras or other recording devices on iLEAD's premises.
- Making false or malicious statements about any employee or iLEAD.
- Using abusive, profane, threatening, indecent, or foul language and/or having inappropriate physical contact with students, parents, or other employees at any time on iLEAD's premises or while performing duties on behalf of iLEAD.
- Violation of the Employee-Student Relations policy
- Violation of any safety, health, security, or other iLEAD policies, rules, or procedures.

Although employment may be terminated at will by either the employee or iLEAD at any time, without following any formal system of discipline or warning, iLEAD may exercise discretion to utilize forms of discipline that are less severe than termination. Examples of less severe forms of discipline include verbal warnings, written warnings, demotions and suspensions. While one or more of these forms of discipline may be taken, no formal order or procedures are necessary.

This statement of prohibited conduct does not alter or limit the policy of employment at will. Either you or iLEAD may terminate the employment relationship at any time for any reason, with or without cause, and with or without notice.

## CONFIDENTIAL INFORMATION

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It is important to iLEAD to protect and preserve its trade secrets and confidential information. Confidential information includes, but is not limited to, all parent and student information, parent and student lists, lesson plans, techniques and concepts, marketing plans, design specifications, design plans, strategies, forecasts, bid plans, bid strategies, bid information, contract prices, new products, software, computer programs, writings, and all know-how and show-how whether or not protected by patent, copyright, or trade secret law. Personal, private information about other employees and personnel matters are also confidential, if learned as a part of the employee's job performance. This policy also encompasses any and all identifying or confidential information of all former and current students which is protected under the Family Educational Rights and Privacy Act.

iLEAD devotes significant time, energy, and expense to develop and acquire its trade secrets and confidential information. As an employee of iLEAD you will, during the course of your employment, have access to and become familiar with various trade secrets and confidential information that are owned by iLEAD. An employee shall not, directly or indirectly, disclose or use any of the foregoing information other than for the sole benefit of iLEAD, either during the term of your employment or at any other time thereafter. This information shall not be disclosed except

through normal channels and with authorization. Any and all trade secrets or confidential information shall be returned to iLEAD during extended leaves of absence or upon termination of employment.

During your employment with iLEAD, you will not be permitted nor required to breach any obligation to keep in confidence, proprietary information, knowledge, or data acquired during your former employment. You must not disclose to iLEAD any confidential or proprietary information or material belonging to former employers or others.

~~Although some written and electronic materials owned by iLEAD may be considered to be public records,~~ employees must refer any person seeking school records or information to Employee Services for handling.

iLEAD prohibits audio or video recordings in the workplace, during working hours, without authorization of iLEAD due to privacy and confidentiality concerns and protections.

Failure to comply with this policy may result in disciplinary action, up to and including termination.

## OUTSIDE EMPLOYMENT

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Employees are required to inform iLEAD, before accepting any employment or consulting relationship with another person or entity while employed by iLEAD. While iLEAD does not uniformly prohibit outside employment, employees will not be permitted to accept outside work that is competitive with iLEAD, that creates a conflict of interest that interferes with the employee's work for iLEAD or that reflects negatively on either the employee or iLEAD. Employee will not render services in person or by electronic means, paid or otherwise, for any other persons or entity during work hours with iLEAD. Employee understands that violating this rule may result in a report to the Commission on Teacher Credentialing, as well as disciplinary action up to and including termination.

## EXPENSE REIMBURSEMENTS

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iLEAD will reimburse employees for reasonably necessary expenses incurred in the furtherance of iLEAD's business. In order to be eligible for reimbursement, employees must follow the protocol set forth in iLEAD's policy regarding expenditures. In general, all expenses must have been previously approved ~~in Purchase Order form~~ by supervisor. Purchase Orders Reimbursement forms may be obtained and completed through the Business Office. All receipts pertaining to the reimbursement must be original and detailed, and should be submitted on a timely basis in accordance with iLEAD's expenditure policy to the Business Office for payment process.



## EMPLOYEE BENEFITS AND LEAVES OF ABSENCE

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iLEAD is happy to provide eligible employees with a wide range of benefits. The description of Benefits that follows is only a brief summary for your general information. For details and exact information, please contact Employee Services.

### PAID SICK LEAVE

iLEAD enacted this policy in accordance with the California Healthy Workplaces, Healthy Families Act to provide paid sick leave (“PSL”) to eligible employees.

### ELIGIBLE EMPLOYEES

All employees (including full-time, part-time and temporary employees) who work more than 30 days within a year in California are eligible to accrue PSL beginning on the first day of employment under the accrual rate and caps set forth in this policy.

### PERMITTED USE

Eligible employees may use their accrued PSL to take paid time off for the diagnosis, care, or treatment of an existing health condition of (or preventative care for) the employee or the employee’s family member.

For purposes of this policy, “family member” means a child, parent, spouse, registered domestic partner, grandparent, grandchild, or sibling of the employee as well as any individual related by blood or affinity whose close association with the employee is the equivalent of a family relationship. “Child” means a biological child, a foster child, an adopted child, a step-child, a child of a registered domestic partner, a legal ward, or a child of a person standing in loco parentis. “Parent” means a biological, foster, or adoptive parent, a step-parent, or a legal guardian of the employee or the employee’s spouse or registered domestic partner. “Spouse” means a legal spouse, as defined by California law.

Employees may also use their PSL to take time off from work for reasons related to domestic violence, stalking, or sexual assault.

### ACCRUAL RATE, MAXIMUM, AND CARRYOVER

Accrual for non-exempt employees will be calculated based on actual hours worked. Accrual of PSL for eligible exempt employees will be calculated based on a 40-hour workweek or the employee’s normal workweek if the employee normally works less than 40 hours. PSL accrues on an as-worked basis and does not accrue during any non-working time or unpaid leave of absence. Accrued but unused PSL will carry over from year to year, subject to a maximum carry over cap as described below.

**All Regular Full-Time Exempt Employees:** iLEAD provides exempt employees with up to 12 days (or 96 hours) of PSL each school year at an accrual rate of 1 day (or 8 hours) per month beginning immediately upon hire or upon the beginning of the school year, whichever occurs first.

- **Certificated regular full-time exempt employees:** The accrual of PSL is capped at a maximum of ~~30~~18 days (or ~~240~~144 hours). Once the employee's PSL reaches the maximum, further accrual of PSL is suspended until the employee has reduced the PSL balance below this limit. In such a case, no PSL will be earned for the period in which the employee's PSL was at the maximum. Accrued but unused PSL will carry over from year to year, subject to a maximum carry over cap of 144 hours.
- **Non-certificated regular full-time exempt employees:** The accrual of PSL is capped at a maximum of 12 days (or 96 hours). Once the employee's PSL reaches the maximum, further accrual of PSL is suspended until the employee has reduced the PSL balance below this limit. In such a case, no PSL will be earned for the period in which the employee's PSL was at the maximum. Accrued but unused PSL will carry over from year to year, subject to a maximum carry over cap of 96 hours.

**All Other Employees:** Eligible employees will accrue one hour of PSL for every 30 hours worked beginning immediately upon hire or upon the beginning of the school year, whichever occurs first. There is a cap on PSL accrual. Employees may accrue up to a maximum accrual of 72 hours of PSL. Once the employee's PSL reaches the maximum, further accrual of PSL is suspended until the employee has reduced the PSL balance below this limit. In such a case, no PSL will be earned for the period in which the employee's PSL was at the maximum. Accrued but unused PSL will carry over from year to year, subject to this maximum accrual.

*For STRS eligible employees (~~certificated staff~~):* To the extent permitted by applicable law, unused sick leave may be counted as additional service credit upon retirement with the California State Teachers Retirement System ("STRS") for those employees who are eligible to participate in such benefits in the year in which they earn the sick leave. Employees who are not eligible for STRS when they earn sick leave may not apply unused sick leave toward any future STRS benefits if those employees later become eligible.

Unused sick leave will be transferred to any subsequent California public school when requested in writing by the former employee and/or employing district/school to the extent permitted by applicable law. Moreover, incoming employees may transfer unused sick leave from any prior California public school when requested in writing by the incoming employee and verified by the former California public school employer to the extent permitted by applicable law. Such transferred sick leave is only available for credit to STRS and is not credited to the employee's sick leave balance at iLEAD.

## LIMITS ON USE

Eligible employees may use accrued PSL beginning on the 90th day of employment in accordance with the maximum amounts listed below:

### **All Regular Full-Time Exempt Employees:**

- **Certificated regular full-time exempt employees:** Each school year, employees may only use a maximum of ~~30~~18 days (or ~~240~~144 hours) of their accrued PSL for qualifying reasons.

- Non-certificated regular full-time exempt employees: Each school year, employees may only use a maximum of 12 days (or 96 hours) of their accrued PSL for qualifying reasons.

**All Other Employees:** Each school year, employees may only use a maximum of 48 hours of their accrued PSL.

PSL may be taken in minimum increments of two hours. If an exempt employee absents himself or herself from work for part or all of a workday for a reason covered by this policy, he or she will be required to use accrued PSL to make up for the absence.

## NOTIFICATION

The employee must provide reasonable advance notification, orally or in writing, of the need to use PSL, if foreseeable. If the need to use PSL is not foreseeable, the employee must provide notice as soon as practicable.

## TERMINATION

Employees will not receive pay in lieu of accrued but unused PSL. Accrued but unused PSL will not be paid out upon termination.

## NO DISCRIMINATION OR RETALIATION

iLEAD prohibits discrimination or retaliation against employees for using their PSL.

# INSURANCE BENEFITS

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## INSURANCE

Full-time employees are entitled to insurance benefits offered by iLEAD. These benefits will include medical, dental, vision and AFLAC. iLEAD will have a defined contribution towards the employee's insurance premiums that are iLEAD sponsored insurance plans. This amount will be determined on an annual basis. The employee's portion of monthly premiums will be deducted from the employee's paycheck on a pre-tax basis.

Full-time employees ~~will~~may also be covered under an insurance policy that includes Life, Short-Term Disability, and Long-Term Disability at no cost to the full time employee. Additional voluntary insurance plans will be offered through iLEAD, which will be the employee's responsibility to pay all premiums.

If medical insurance premium rates increase, employees may be required to contribute to the cost of increased premiums to retain coverage. Failure to timely request and pay for such coverage will result in the loss of coverage.

## DISABILITY INSURANCE (WAGE SUPPLEMENT)

All employees are enrolled in California State Disability Insurance ("SDI"), which is a partial wage- replacement insurance plan for California workers. Employees may be eligible for SDI when they are ill or have non-work

related injuries. Employees may also be eligible for SDI for work related injuries if they are receiving workers' compensation at a weekly rate less than the SDI rate. Specific rules and regulations relating to SDI eligibility are available from Employee Services.

### FAMILY LEAVE INSURANCE (WAGE SUPPLEMENT)

Eligible employees are covered by California's Paid Family Leave ("PFL") benefit. Paid Family Leave does not provide employees with a protected leave of absence. Rather, Paid Family Leave provides only partial wage replacement benefits when an employee has been approved for a leave of absence. In order to obtain approval for leave of absence for the reasons set forth below, the employee must contact Employee Services. Leave to care for certain family members may be covered by applicable law for certain eligible employees. Leave that is not covered by applicable law may or may not be approved by iLEAD, in iLEAD's sole discretion. Nothing in this policy guarantees that iLEAD will provide additional leaves of absence other than those already required by applicable law.

The PFL fund is administered by the California Employment Development Department ("EDD"), not iLEAD, which means that employees must apply to the EDD to receive this benefit. Through the PFL fund, the EDD will provide eligible employees with a wage supplement for a maximum of six weeks within a 12-month period. PFL benefits may be available from the EDD for a leave of absence for the following:

- For the birth or placement of a child, as defined by the PFL law, for adoption or foster care within one year of the birth or placement of the child; or
- To care for an immediate family member (spouse, registered domestic partner, child or parent, grandparent, grandchild, sibling and parent-in-law, as defined by the PFL law) who is seriously ill and requires care.

PFL benefits will be coordinated with an otherwise authorized leave of absence. In such circumstances, the use of PFL benefits and/or paid time off during the leave period will not extend the length of the leave beyond what is required by applicable law and/or iLEAD policy.

### WORKERS' COMPENSATION INSURANCE

Eligible employees are entitled to Workers' Compensation Insurance benefits when suffering from an occupational illness or injury. This benefit is provided at no cost to the employee. See below for a further description of making a claim for Workers' Compensation Insurance benefits.

### UNEMPLOYMENT COMPENSATION

iLEAD contributes a significant amount of money each year to the California Unemployment Insurance Fund on behalf of its employees. Under certain circumstances, you may be eligible for unemployment insurance benefits.

## LEAVES OF ABSENCE

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At iLEAD, we understand employees may experience personal or medical matters during their time of employment here. If an employee has a need for a Leave of Absence, please notify your supervisor and follow the guidelines outlined below.

Under certain circumstances, iLEAD may grant leaves of absence to employees. Employees must submit requests for leaves of absence in writing to Employee Services as far in advance as possible. To open the lines of communication, while on leave, we ask employees to keep in contact with Employee Services and notify Employee Services if the date to return to work changes. If an employee's leave expires and the employee fails to return to work without contacting Employee Services, it will be presumed that the employee abandoned his/her position with iLEAD and employment may be terminated. If an employee is unable or unwilling to return to work at the expiration of his/her leave of absence, his/her employment may be terminated as permitted by law.

This Guidebook summarizes leave that may be available to employees. Most leave policies have differing requirements for eligibility, duration, benefits, etc. Therefore, employees should contact Employee Services to request specific information relating to a particular leave policy. Employee benefits, including, but not limited to, paid sick leave, do not accrue during a leave of absence unless otherwise required by law or by applicable iLEAD policies.

While out on a leave of absence, employees may not accept employment with another school employer or person unless agreed to in advance in writing by Employee Services. Acceptance of employment in violation of this policy will be considered an abandonment of the employee's position with iLEAD, and employment may be terminated.

~~Employees shall not apply for unemployment compensation insurance while out on leave.~~

### FAMILY AND MEDICAL LEAVE (FMLA) / CALIFORNIA FAMILY RIGHTS ACT (CFRA)

Under the Family and Medical Leave ("FMLA") and California Family Rights Act ("CFRA"), eligible employees may request a family and medical leave of absence under the circumstances described below. Eligible employees are those who have been employed by iLEAD for at least 12 months (not necessarily consecutive) and have worked at least 1250 hours during the 12 months immediately prior to the family and medical leave of absence for purposes of FMLA leave, an eligible employee must also be employed at a worksite where there are 50 or more employees of iLEAD within a 75 miles.

Ordinarily, you must request a planned family and medical leave at least 30 days before the leave begins. If the need for the leave is not foreseeable, you must request the leave as soon as practicable. You should use iLEAD's request form, which is available upon request from Employee Services. Failure to comply with this requirement may result in a delay of the start of the leave.

A family and medical leave may be taken for the following reasons:

1. the birth of an employee's child or the placement of a child with the employee for foster care or adoption, so long as the leave is completed within 12 months of the birth or placement of the child;

2. the care of the employee's spouse, child or parent<sup>1</sup> with a "serious health condition" and for purposes of CFRA only, the care CFRA ONLY) ~~the care~~ of the employee's grandparent, grandchild, sibling or registered domestic partner with a "serious health condition";
- ~~43.~~ the "serious health condition" of the employee;
- ~~54.~~ (FMLA ONLY) the care of the employee's spouse, child, parent, or next of kin who is a member of the Armed Forces, including a member of the National Guard or Reserves, and who is undergoing medical treatment, recuperation, or therapy, is otherwise in outpatient status, or is otherwise on the temporary disability retired list, for a serious injury or illness; or
- ~~65.~~ any qualifying exigency as defined by the applicable regulations arising out of the fact that the employee's spouse, child, registered domestic partner (CFRA only) or parent is on active duty (or has been notified of an impending call or order to active duty) in the Armed Forces in support of a contingency operation.

A "serious health condition" is one that requires inpatient care in a hospital or other medical care facility or continuing treatment or supervision by a health care provider. You may take a leave under paragraph (2) above only if due to a serious health condition, your spouse, child, parent, parent-in-law, grandparent, grandchild, sibling, or registered domestic partner (as may be applicable for FMLA/CFRA purposes) requires your care or assistance as certified in writing by the family member's health care provider. If you are seeking a leave under paragraph (3) above, you must provide iLEAD with a medical certification from your health care provider establishing eligibility for the leave, and you must provide iLEAD with a release to return to work from the health care provider before returning to work. You must provide the required medical certification to iLEAD in a timely manner to avoid a delay or denial of leave. You may obtain the appropriate forms from Employee Services.

FMLA/CFRA leave is unpaid and may be taken for up to 12 workweeks during the designated 12-month period (with the exception of FMLA qualifying leaves to care for a member of the Armed Services who has a serious illness or injury, which may be taken for up to a total of 26 workweeks of leave during a single 12-month period). The 12-month period will be defined as a "rolling twelve months" looking backward over the preceding 12 months to calculate how much family and medical leave time has been taken and therefore determine the amount of leave that is available. FMLA qualifying leaves to care for a member of the Armed Services who has a serious illness or injury will be calculated on the 12-month period looking forward. All time off that qualifies as family and medical leave will be counted against your state and federal family and medical leave entitlements to the fullest extent permitted by law.

You will be required to use any accrued PSL during unpaid family and medical leave that is due to your own <sup>2</sup>serious health condition. If mutually agreed upon between iLEAD and the employee, PSL may be used for the care of a qualifying family member or in connection with the birth, adoption or foster care of a child. However, if an employee is receiving benefit payments pursuant to a disability insurance plan (such as California's State Disability Insurance

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<sup>1</sup> For purposes of FMLA only, the term "parent" does not extend to parents-in-law. Further, for purposes of FMLA only, a child does not refer to a child who is over 18 years of age (unless they are incapable of self-care because of a medical or physical disability) nor does it include the child of a registered domestic partner unless the employee stands in loco parentis to the child.

plan or Paid Family Leave program) or workers' compensation insurance plan, the employee and iLEAD may mutually agree to supplement such benefit payments with available PSL.

Benefit accrual, such as PSL and holiday benefits, will be suspended during the approved leave period and will resume upon return to active employment. During FMLA/CFRA leave, group health benefits will be maintained as if you were continuously employed. However, you must continue to pay your share of applicable premiums (for yourself and any dependents) during the leave.

If you do not return to work on the first workday following the expiration of an approved FMLA/CFRA leave, you will be deemed to have resigned from your employment. Upon returning from such a leave, you will normally be reinstated to your original or a comparable position and will receive pay and benefits equivalent to those you received prior to the leave, as may be required by law. In certain circumstances under FMLA leave, "key" employees may not be eligible for reinstatement following a family and medical leave. iLEAD will provide written notice to any "key" employee who is not eligible for reinstatement.

#### PROCEDURES FOR REQUESTING AND SCHEDULING FMLA/CFRA LEAVE

An employee should request FMLA/CFRA leave by completing a Request for Leave form (available from Employee Services) and submitting it to supervisor and Employee Services. An employee asking for a Request for Leave form will receive a copy of iLEAD's then-current FMLA/CFRA leave policy.

As mentioned above, employees should provide not less than 30 days' notice of their intent to take FMLA/CFRA leave or if such notice is not possible, employees should provide notice as soon as is practicable, for foreseeable childbirth, placement or any planned medical treatment for the employee or his/her qualifying family member.

If an employee needs intermittent leave or leave on a reduced leave schedule that is foreseeable based on planned medical treatment for the employee or a family member, the employee may be transferred temporarily to an available alternative position for which he/she is qualified that has equivalent pay and benefits and that better accommodates recurring periods of leave than the employee's regular position.

If an FMLA/CFRA leave request is granted, iLEAD will notify the employee in writing that the leave will be counted against the employee's FMLA/CFRA leave entitlement. This notice will explain the employee's obligations and the consequences of failing to satisfy them.

#### PREGNANCY DISABILITY LEAVE

iLEAD provides pregnancy disability leaves of absence without pay to eligible employees who are temporarily unable to work due to a disability related to pregnancy, childbirth, or related medical conditions. Employees should make requests for pregnancy disability leave to their supervisor at least 30 days in advance of foreseeable events and as soon as possible for unforeseeable events. A health care provider's statement must be submitted, verifying the need for such leave and its beginning and expected ending dates. Any changes in this information should be promptly reported to iLEAD. Employees returning from pregnancy disability leave must submit a health care provider's verification of their fitness to return to work.



iLEAD will make a good faith effort to provide reasonable accommodations and/or transfer requests when such a request is medically advisable based on the certification of a health care provider. When an employee's health care provider finds it is medically advisable for an employee to take intermittent leave or leave on a reduced work schedule and such leave is foreseeable based on planned medical treatment because of pregnancy, iLEAD may require the employee to transfer temporarily to an available alternative position. This alternative position will have equivalent rate of pay and benefits and must better accommodate recurring periods of leave than the employee's regular job.

Eligible employees are normally granted unpaid leave for the period of disability, up to a maximum of four months (or 17 1/3 weeks or 693 hours) per pregnancy. Employees will be required to use any accrued sick time during any unpaid portion of pregnancy disability leave. If an employee is receiving benefit payments pursuant to a disability insurance plan (such as California's State Disability Insurance plan or Paid Family Leave program), the employee and iLEAD may mutually agree to supplement such benefit payments with available sick leave.

Benefit accrual, such as sick leave and holiday benefits, will be suspended during the approved pregnancy disability leave period and will resume upon return to active employment. Group health benefits will be maintained during the approved pregnancy disability leave as if you were continuously employed. However, you must continue to pay your share of applicable premiums (for yourself and any dependents) during the leave.

So that an employee's return to work can be properly scheduled, an employee on pregnancy disability leave is requested to provide iLEAD with at least one week's advance notice of the date she intends to return to work.

When an approved pregnancy disability leave ends, the employee will be reinstated to the same position, unless the job ceased to exist because of legitimate business reasons. An employee has no greater right to reinstatement to the same position or to other benefits and conditions of employment than if she had been continuously employed in this position during the pregnancy disability leave or transfer. If the same position is not available, the employee will be offered a comparable position in terms of such issues as pay, location, job content, and promotional opportunities, if one exists. An employee has no greater right to reinstatement to a comparable position or to other benefits or conditions of employment than an employee who has been continuously employed in another position that is being eliminated.

If you have any questions regarding pregnancy disability leave, please contact Employee Services.

#### UNPAID LEAVE OF ABSENCE (MEDICAL)

In an effort to comply with its duty to accommodate employees with qualifying disabilities, iLEAD may provide leaves of absence without pay when an employee is temporarily unable to work due to a mental or physical disability, certified in writing by his or her health care provider, unless such leave would cause an undue hardship to iLEAD. Approved absences of less than two weeks are not treated as medical leaves of absences but rather as excused absences without pay. Employees granted unpaid medical leave have no right to guaranteed reinstatement.

Employees will be required to use any accrued PSL during any unpaid portion of this leave. Benefit accrual, such as paid sick leave, and holiday benefits, will be suspended during an unpaid medical leave period and will resume upon return to active employment. Unless otherwise required by law, iLEAD does not continue to pay premiums



for health insurance coverage for employees on unpaid medical leave. However, if eligible, you may self-pay the premiums under the provisions of COBRA.

#### DISCRETIONARY UNPAID LEAVE OF ABSENCE (NON-MEDICAL)

Under emergency circumstances for personal or other reasons, you may need to be temporarily released from the duties of your job with iLEAD. It is the policy of iLEAD to allow its eligible employees to apply for and be considered for certain specific leaves of absence not otherwise set forth in this ~~handbook~~ Guidebook.

Failure to return to work as scheduled from an approved leave of absence, or failure to inform Employee Services of an acceptable reason for not returning as scheduled, will be considered ~~a voluntary resignation of employment to have abandoned his/her employment.~~

All requests for leaves of absence shall be submitted in writing to Employee Services. Each request shall provide sufficient detail, including the reason for the leave, the expected duration of the leave, and the relationship of family members, if applicable.

Regular full time employees who have completed one year of service are eligible for an unpaid personal leave of absence of thirty (30) calendar days. During that time, you may remain covered under iLEAD's medical plans subject to plan eligibility and requirements and must continue to pay their portion of the applicable premiums.

A request for a personal leave will be evaluated on a number of factors, including anticipated operational and staffing requirements during the proposed time of absence. In the case where the initial 30 calendar days are insufficient, consideration may be given for an extension of 30 more days if your manager is informed in writing.

If you are on leave for more than 30 days, you must pay the full costs of your insurance benefits. iLEAD will resume payments when you return to active employment.

Employees do not continue to accrue sick leave or holiday benefits while they are on unpaid discretionary leaves of absence. Further, employees have no guaranteed reinstatement of employment following the expiration of any leave of absence granted under this policy.

#### FUNERAL/BEREAVEMENT LEAVE

iLEAD employees will be allowed up to 5 consecutive working days off to arrange and attend the funeral of an immediate family member (3 days in-state or 5 days out of state). Regular exempt full-time employees will receive this time with pay. For all other employees, the time off will be unpaid.

For purposes of this policy, an employee's immediate family member includes a current spouse, parent, legal guardian, sibling, child, ~~current~~ parent-in-law, sister-in-law, ~~or~~ brother-in-law, grandparent, grandchild, or domestic partner.

In certain circumstances, iLEAD may offer up to two weeks of additional paid bereavement leave. Such leave will be allowed only at the discretion and approval of Employee Services.

## MILITARY LEAVE OF ABSENCE

All employees who leave iLEAD for active military service or military reserve duty will be placed on an unpaid military leave of absence. Employees are entitled to reinstatement upon completion of such military service or duty, provided an application for reinstatement is made within 90 days of discharge, or as otherwise provided by law.

Time spent on military leave counts for purposes of determining “length of service.” However, you will not accrue sick leave or receive holiday pay during military leave.

## FAMILY MILITARY LEAVE

Qualified employees are eligible for up to 10 days of unpaid leave when their spouse or registered domestic partner is on leave from military deployment. A qualified employee is one who regularly works more than 20 hours per week and whose spouse or registered domestic partner is a member of the Armed Forces, National Guard, or Reserves and is on leave from deployment during a period of military conflict.

If you are eligible for such leave, please submit a written request for leave to Employee Services within two business days of receiving official notice that your spouse or registered domestic partner will be on leave from deployment. You will also be required to provide written documentation certifying that your spouse or registered domestic partner will be on leave from deployment.

The employee may take this time off without pay unless otherwise required by applicable law.

## DRUG AND ALCOHOL REHABILITATION LEAVE

iLEAD will reasonably accommodate an employee who voluntarily enters and participates in an alcohol or drug rehabilitation program, including potentially providing unpaid leave to participate in the program, provided that the accommodation does not impose an undue hardship on iLEAD. iLEAD will not pay for the costs incurred in attending a rehabilitation program. An employee who wishes to identify him or herself as an individual in need of the assistance of an alcohol or drug rehabilitation program may contact Employee Services. iLEAD will take all reasonable steps necessary to maintain the employee’s privacy in this situation. The employee may use paid sick leave, if any, during requested leave.

Nothing in this policy shall prohibit iLEAD from refusing to hire or from discharging an employee who, because of his or her current use of alcohol or drugs, is unable to perform his/her duties or cannot perform the duties in a manner that would not endanger his/her health or safety or the health or safety of others. This policy in no way restricts iLEAD’s right to discipline an employee, up to and including termination of employment, for violation of iLEAD’s Drug and Alcohol Abuse Policy.

## TIME OFF TO ATTEND CHILD’S SCHOOL DISCIPLINE

Any employee who is a parent or legal guardian of a child that has received written notice from the child’s school requesting his or her attendance at a disciplinary conference is entitled to take unpaid leave to attend the conference. Please contact your supervisor to determine eligibility and scheduling before taking any leave to attend a disciplinary conference.

To be eligible for time off to attend a child's school, the employee must present the school's letter, which requests the employee's appearance at the school, to his or her supervisor at least two days before the requested time off (if advanced notice is provided). This type of leave will be unpaid.

#### TIME OFF TO ATTEND CHILD'S SCHOOL ACTIVITIES

If you are the parent or guardian of a child who is in school up to grade 12, or who attends a licensed day care facility, you may take up to 40 hours of unpaid leave per year to participate in the activities of the school or day care facility, to find, enroll or reenroll your child in a school or with a licensed child care provider and/or to address a child care provider or school emergency. You may take no more than eight hours off for this purpose in any one calendar month. Unless it is to address an emergency, you should schedule this time off with your supervisor in advance.

You may be asked to provide documentation from the school or day care facility that you participated in the activity to confirm your attendance at its facility for reasons covered under this policy on the specific date and time that you took the leave. This time off is unpaid.

#### TIME OFF FOR JURY AND WITNESS DUTY

iLEAD encourages employees to serve on jury or witness duty when called. An employee must notify their supervisor of the need for time off for jury or witness duty as soon as a notice or summons from the court or a subpoena is received. ~~Time off for jury and witness duty is unpaid.~~ Any jury pay or mileage may be kept by the employee. Non-exempt employees who are called for jury/witness duty will be provided time off without pay. Exempt employees will receive their regular salary unless they do not work any hours during the course of a workweek.

Verification from the court clerk of having served may be required and you will be expected to report or return to work for the remainder of your work schedule on any day you are dismissed from jury or witness duty.

In the event that the employee must serve as a witness within the course and scope of his or her employment with iLEAD, iLEAD will provide time off with pay.

#### RIGHTS FOR VICTIMS OF CRIME OR ABUSE

##### Right to Time Off:

<sup>2</sup>If you are the victim of stalking, domestic violence, sexual assault, or a crime that caused physical injury or that caused mental injury and a threat of physical injury, or if your immediate family member is deceased because of a crime, you are permitted to be absent from work to seek relief related to the crime or abuse. Relief includes, but is not limited to, obtaining a temporary restraining order, a restraining order, or other injunctive relief to help ensure the health, safety, or welfare of you or your child. You are permitted to take leave for this purpose whether or not any person is arrested for, prosecuted for, or convicted of committing the crime. All employees can also take time off from work to get medical attention or services from a domestic violence shelter, program, or rape crisis center, or receive psychological counseling or safety planning related to domestic violence, sexual assault, or stalking.

Employees may use available accrued PSL. Otherwise, the time off is unpaid. In general, employees are not required to provide documentation for time off under this policy. However, employees shall provide reasonable advance notice of their intent to take time off, unless advance notice is not feasible. If employees are unable to provide advance notice for time off under this policy, they can provide certification of their absence (such as a police report, court order, or health care provider certification, or other documentation that reasonably verifies that the crime or abuse occurred and your absence was for an authorized purpose) within a reasonable time period thereafter.

If employees provide reasonable advance notice or provide documentation within a reasonable time period thereafter for an unscheduled absence, they will not be subject to any disciplinary action for time off under this policy.

#### Right to Reasonable Accommodation for Victims of Domestic Violence, Sexual Assault or Stalking:

Employees have the right to ask iLEAD for help or changes in their workplace to make sure they are safe at work. iLEAD will work with its employees to see what changes can be made. Changes in the workplace may include putting in locks, changing shifts or phone numbers, transferring or reassigning the employee, or help with keeping a record of what happened to the employee. iLEAD may ask the affected employee for a signed statement certifying that this request is for a proper purpose and may also request proof showing the need for an accommodation. iLEAD will maintain confidentiality regarding any requests for accommodations under this policy.

Prohibition on Retaliation and Discrimination: iLEAD is committed to ensuring employees are not treated differently or retaliated against because of any of the following:

- The employee is a victim of a crime or abuse.
- The employee asked for time off to get help
- The employee asked iLEAD for help or changes in the workplace to ensure safety at work.

Right to File a Complaint: If any employee believes that he or she has experienced retaliation or discrimination as a result of conduct protected by this policy, the employee may file a complaint with his or her supervisor and/or the Labor Commissioner's Office.

For more information, contact the Labor Commissioner's Office by phone at 213-897-6595 or visit a local office by finding the nearest one on its website: [www.dir.ca.gov/dlse/DistrictOffices.htm](http://www.dir.ca.gov/dlse/DistrictOffices.htm). The Labor Commissioner's Office provides an interpreter at no cost to the employee, if needed.

#### TIME OFF FOR VICTIMS OF CRIME

If you are the victim—or an immediate family member (i.e., spouse, registered domestic partner, child, step-child, sibling, step-sibling, parent, step-parent, or the child of a registered domestic partner) of the victim—of a violent felony, serious felony (as defined by the California Penal Code), or felonies related to theft or embezzlement, you are permitted to be absent from work to attend judicial proceedings related to the crime.

You must provide your supervisor with written notification for each scheduled proceeding, unless advance notice is not possible. This time off is unpaid.

The types of verification iLEAD may require for an unscheduled judicial processing include: documentation evidencing the judicial proceeding from any of the following entities: the court or government agency setting the hearing; the district attorney or prosecuting attorney's office; or the victim/witness office that is advocating on behalf of the victim.

#### TIME OFF FOR EMERGENCY DUTY/TRAINING FOR VOLUNTEER FIREFIGHTERS, RESERVE PEACE OFFICERS OR EMERGENCY RESCUE PERSONNEL

If you are a registered volunteer firefighter, reserve peace officer, or emergency rescue personnel (including an officer, employee or member of a disaster medical response entity sponsored or requested by the state) who intends to perform emergency duty/training during work hours, please alert your supervisor so iLEAD is aware of the fact that you may have to take time off to perform emergency duty/training. In the event any employee needs to take time off for this type of emergency duty/training, a supervisor must be notified before leaving work. All time off for these purposes is unpaid.

Registered volunteer firefighters, reserve peace officers or emergency rescue personnel are eligible to take temporary unpaid leaves of absence for fire or law enforcement training not to exceed 14 days per calendar year. In the event you need to take time off for this type of emergency duty/training, you must notify your supervisor and Employee Services in advance.

If you feel you have been treated unfairly as a result of taking or requesting emergency duty/training, you should contact your supervisor or any other manager, as appropriate.

#### CIVIL AIR PATROL LEAVE

iLEAD will not discriminate against an employee for membership in the Civil Air Patrol. Additionally, iLEAD will not retaliate against an employee for requesting or taking Civil Air Patrol leave, which is unpaid.

iLEAD will provide not less than 10 days per year of leave but no more than 3 days at for a time to employees who are volunteer members of the California Wing of the Civil Air Patrol single emergency operational mission unless the emergency is extended by the entity in charge of the operation and iLEAD approves the leave. Employees must have been employed by iLEAD for at least 90 days immediately preceding the commencement of leave, and must be duly directed and authorized by a political entity that has the authority to authorize an emergency operational mission of the California Wing of the Civil Air Patrol.

Employees must request leave with as much notice as possible in order to respond to an emergency operational mission of the California Wing of the Civil Air Patrol.

Leave under this policy is unpaid. Following leave under this policy, an employee must return to work as soon as practicable and must provide evidence of the satisfactory completion of civil air patrol service. If the employee complies with these requirements, the employee will be restored to their prior position without loss or to a position with equivalent seniority of status, pay, ~~or and~~ other benefits, unless the employee is not restored because of conditions unrelated to the exercise of the leave rights by the employee.

## TIME OFF TO VOTE

iLEAD encourages all employees to fulfill their civic responsibilities and to vote in all public elections. Most employees' schedules provide sufficient time to vote either before or after working hours.

Because polls are generally open from 7:00 a.m. until 8:00 p.m., employees generally are able to find time to vote either before or after their regular work schedule. If you do not have sufficient time outside of working hours to vote and have not requested an absentee ballot, you may receive up to two hours of paid time off to vote. Any additional time off will be without pay.

Employees must request time off from their supervisor at least two working days before election day so that the necessary time off can be scheduled at the beginning or end of the work shift, whichever provides the least disruption to normal work schedules.

If approved for time off, you will not incur any attendance infractions for missing work to vote. Employees must submit a voter's receipt on the first working day following the election to qualify for paid time off.

## WORKERS' COMPENSATION LEAVE

iLEAD will grant you a workers' compensation disability leave in accordance with state law if you incur an occupational illness or injury. As an alternative, iLEAD may offer you modified work. Leave taken under the workers' compensation disability policy runs concurrently with family and medical leave under both federal and state law (if eligible) and is unpaid (although certain wage replacement benefits may be available).

An employee who sustains a work-related injury or illness should inform his or her supervisor and Employee Services immediately. No matter how minor an on-the-job injury may appear, it is important that it be reported immediately. This will enable an eligible employee to qualify for coverage.

## LEAVE FOR BONE MARROW AND ORGAN DONORS

Pursuant to California law, iLEAD will provide up to five business days of paid leave within a one-year period to an employee who donates bone marrow to another person. In addition, iLEAD will also provide up to 30 business days of paid leave within a one-year period and up to 30 business days of *unpaid* leave within a one-year period to an employee who donates an organ to another person. This one-year period is measured from the date the employee's leave begins and shall consist of 12 consecutive months.

iLEAD requires that bone marrow donors use up to five days of available accrued sick time during the course of the leave. Organ donors must use up to ten days of available accrued PSL time during the course of the leave.

To qualify for this leave, an employee must have been employed for at least 90 days prior to the commencement of the leave and must provide iLEAD with written verification of his or her status as an organ or bone marrow donor and the medical necessity for the donation. During such leave, iLEAD will continue coverage under its group medical insurance plan, if applicable. However, employees must continue to pay their portion of the applicable premiums. Employees should give iLEAD as much notice as possible of the intended dates upon which the leave would begin and end.

## ADULT LITERACY LEAVE

Pursuant to California law, iLEAD will reasonably accommodate any eligible employee who seeks to enroll in an adult literacy education program, provided that the accommodation does not impose an undue hardship on iLEAD. iLEAD does not provide paid time off for participation in an adult literacy education.

## EMPLOYMENT EVALUATION AND SEPARATION

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### EMPLOYEE REVIEWS AND EVALUATIONS

To encourage open communication with employees and supervisors, iLEAD supports the Performance Review also known as Reflective Supervision process. iLEAD strives to conduct employee performance reviews annually. The frequency of performance evaluations may vary depending upon length of service, job position, past performance, changes in job duties or recurring performance problems.

There are several advantages to work planning:

- It helps you and your supervisor establish priorities among different work activities. It sets standards or goals that can help you increase your own productivity by providing a focus on your efforts in relation to goals.
- It provides an opportunity for you to share your ideas on doing your job better.
- It establishes expectations in advance, together with the results that will be used to determine success, which will help to ensure that your performance is judged fairly.

The performance evaluations are intended to make you aware of your progress, areas for improvement and objectives or goals for future work performance. Favorable performance evaluations do not guarantee increases in salary or promotions or retention of your job. Salary increases and promotions are solely within the discretion of iLEAD and depend upon many factors in addition to performance. After the review, you will be required to sign the evaluation report simply to acknowledge that ~~its~~ it has been presented to you, that you have discussed it with your supervisor, and that you are aware of its contents. The evaluation system in no way alters the employment at-will relationship. Failure by iLEAD to conduct a performance review will not prevent iLEAD from terminating your employment.

### DISCIPLINE AND INVOLUNTARY TERMINATION

Violation of iLEAD's policies and rules may warrant disciplinary action, which may take multiple forms, including verbal warnings, written warnings, suspensions or termination. iLEAD's disciplinary system is informal and iLEAD may, in its sole discretion, utilize any form of discipline it deems appropriate under the circumstances, up to and including termination of employment upon the first offense.

### VOLUNTARY TERMINATION

Either the employee or iLEAD may terminate the employment relationship at any time, with or without notice and with or without cause. We hope that you will enjoy your employment with iLEAD. However, if you decide to

resign, while it is not required, iLEAD requests that you give as much advance notice as possible (preferably two weeks) to allow iLEAD to plan for your departure.

iLEAD values its employees and is committed to providing a positive, rewarding and productive work environment. As a result, we appreciate your honest feedback during your exit interview. An exit interview may be scheduled on the last day of work with Employee Services. The purposes of the exit interview ~~is~~are to review eligibility for benefit conversion, to ensure that all necessary forms are completed, to collect any iLEAD property (including keys, equipment, documents and records) that may be in the employee's possession, to review the employee's obligations regarding confidential information, and to provide the employee with the opportunity to make any constructive comments and suggestions on improving the working environment at iLEAD. Final pay will be provided in accordance with state law.

#### RETURN OF PROPERTY

Employees are required to return iLEAD property that is in their possession or control in the event of termination of employment, resignation, or layoff, or immediately upon request. We may also take all action deemed appropriate to recover or protect iLEAD property.

#### REFERENCES

All requests for references and employment verifications must be promptly directed to Employee Services. When contacted for a reference or employment verification, iLEAD will only provide information concerning dates of employment and the title of the last position held. Other employees may not provide any employment verification.



## ACKNOWLEDGEMENT OF GUIDEBOOK AND AT WILL EMPLOYMENT

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I acknowledge that I have received the Employee Guidebook. I have read the Guidebook and understand the contents of the Guidebook. I agree to abide by all of iLEAD's policies.

I understand and agree to my at-will employment status as described in the Guidebook, summarized as follows:

- This Guidebook does not in any way reflect a contract of employment, either express or implied between iLEAD and me.
- iLEAD is an at-will employer. I am free to terminate the employment relationship with iLEAD at any time; iLEAD, in its sole discretion, also reserves the right to modify or terminate the employment relationship with me for any or no reason at any time. Specifically, iLEAD may modify all terms of employment including any policy or practice and/or my hours, wages, working conditions, job assignments, position title, compensation rates and benefits in its sole discretion.
- Nothing in this Guidebook creates, or is intended to create, a promise or representation of continued employment or guaranteed terms and conditions of employment for me. Further, there is no agreement, express or implied, written or verbal, between ~~the employee~~ and iLEAD for any specific period of employment, for continuing or long-term employment, or for guaranteed terms and conditions of employment.

I understand that no supervisor or representative of iLEAD has the authority to enter into any agreement, express or implied, for employment for any specific period of time, or to make any agreement for employment other than at-will. I understand that only the Board of Directors has the authority to make any such agreement and then only in writing signed by the Board of Directors.

Employee's Name: \_\_\_\_\_

Employee's Signature: \_\_\_\_\_

Dated: \_\_\_\_\_

[TO BE PLACED IN EMPLOYEE'S PERSONNEL FILE]



## **iLEAD CALIFORNIA**

### **Full-Time and Part-Time Hourly Employee Holiday Benefit Policy**

Board Approved :

The following is our company's holiday benefit policy that outlines all the days of the year that we acknowledge and observe as holidays. iLEAD CA will close its doors on these days and employees are expected to comply by not working. Work done on a day that falls on an observed holiday will only be approved when the work is absolutely necessary to perform vital job functions related to the needs of the organization such as payroll information submittal and processing, state reporting, or any urgent matters that cannot be delayed until after the holiday.

### **Holiday Benefit Policy Effective July 1, 2022 through June 30, 2023**

#### **Eligibility**

Exempt salaried employees who have worked for iLEAD CA for at least 90 days are eligible to receive holiday pay.

Non-exempt hourly employees who are classified as regular, full-time or part-time employees and who have worked for iLEAD CA for at least 90 days are eligible to receive holiday pay.

Hourly full-time employees will receive their normal rate of pay for holidays identified by iLEAD and set forth on a schedule issued by the Employee Services annually.

Hourly eligible part-time employees will receive holiday pay on a prorated basis (paid at the rate of hours that would have normally been worked on that particular holiday day of the week).

If a recognized holiday falls during an unpaid leave of absence, no pay will be given for the Holiday.

The following employees are NOT eligible for holiday benefits:

Hourly employees who work directly with the Exploration & iLEAD AV programs, temporary employees, and employees in internship programs.



## **Paid Holidays**

iLEAD CA recognizes the following paid holidays each year:

- New Year's' Day (Observed January 2nd)
- Martin Luther King Day
- Presidents' Day
- Memorial Day
- Juneteenth
- Independence Day
- Summer Holiday (10 days by Labor Day at the department Directors Discretion)
- Labor Day
- Veterans' Day
- Thanksgiving Holiday (Thursday and Friday)
- Christmas (Observed December 26th)
- Winter Holiday (December 22-23- & 27-30)

Should a holiday fall on a weekend, the holiday will be observed on the workday closest to the holiday.

## **Procedures**

The following conditions apply to iLEAD CA's holiday benefit policy:

- Holiday pay will not be considered as time worked for the purpose of overtime calculations.
- Holiday pay is computed at an individual employee's base rate of pay.
- If an employee is scheduled to work on a holiday, the employee will be paid his or her regular rate of pay plus holiday pay.
- Holidays will not be paid to employees on any type of unpaid leave.
- Holidays falling within an approved scheduled vacation will be recorded as holiday pay.
- An employee must be present at work on his or her last scheduled day prior to the holiday and the first scheduled day after the holiday to receive holiday pay.

## **Religious Holidays**

Apart from observed state and national holidays, some employees may observe separate religious holidays. Employees may take unpaid time off for an observed religious holiday, unless such an arrangement will cause undue hardship to our company.



## iLEAD Hybrid

### Employee BYOD Cell Phone Policy

Board Approved:

iLEAD Hybrid extends its employees the privilege of using smartphones and tablets of their choosing at work for their convenience. iLEAD Hybrid reserves the right to revoke this privilege if users do not follow the BYOD agreement outlined below as well as the School Communication and Technology Use Policy outlined in the Employee Guidebook. The agreement is intended to protect the security and integrity of iLEAD Hybrid data and technology infrastructure.

1. **Policy:** Employees whose job duties include the frequent need for a cell phone may receive a Cell Phone Reimbursement Benefit to cover business-related costs associated with using their personal cell phone.
  - a. iLEAD Hybrid will not provide a Cell Phone Reimbursement benefit of an amount greater than the employee's current service plan.
  - b. The cell phone service is personally owned and may therefore be used for both personal and business calls.
  - c. As a general rule, cell phones should not be selected as an alternative if other means of communication are available to the employee – e.g., land-lines, radio phones, walkie-talkie—when such alternatives would provide adequate but less costly service to the schools.
2. **Cell Phone Reimbursement Benefit:**
  - a. **Eligibility:** Employees eligible for a Cell Phone Reimbursement Benefit generally include department heads, supervisors, full-time and part-time employees whose job duties regularly require emergency call back, irregular work hours or other job-related factors that require the employee to routinely utilize a cell phone to enhance their ability to perform their job duties.
  - b. **Cell Phone Reimbursement Benefit Amount:** The standard monthly Cell Phone Reimbursement Benefit amount shall be as follows;
    - **School/ Site Director-** ~~\$50~~ **\$75**
    - **Office/ Business Manager-** **\$35 FT**
    - **Outreach Coordinator and other Administrative-** **FT \$35 PT \$17.50**
      - **Educational Facilitator- FT \$25 PT \$10**
      - **Student Support- FT \$25 PT \$10**

- c. **Cell Phone Reimbursement Benefit Payment:** The approved Cell Phone Reimbursement Benefit will be included in the employee's paycheck as a Cell Phone Reimbursement Benefit, provided the employee attests to the amount being less than the cost of their cell phone service. This benefit is **not** an increase to base pay, and will **not** be included in the calculation of percentage increases to base pay due to salary increases, promotions, etc.
  - d. Employees who believe they are not being adequately benefitted for work related usage of their personal cell phones are encouraged to consult with their department head.
- 3. **Department Supervisor Responsibilities:**
  - a. Annually review communication device needs in his or her department to determine if benefits should be changed, continued, or discontinued, or if an additional amount is needed;
  - b. Notify accounts payable if the employee no longer requires a benefit due to responsibility changes or termination.
  - c. Submit all signed agreements to Human Resources for processing.
- 4. **Employee Responsibilities:**
  - 1. The employee must provide their department head and the Technology Department with their current cell phone number and immediately notify both parties if the number changes.
  - 2. The cell phone service is personally owned and may therefore be used for both personal and business calls.
    - a. Employees may choose the cellular service provider and plan design of their choice.
    - b. If available from the School's contracted cellular service provider, employees may be able to take advantage of discounts for their personal service plans if they utilize the same provider as the school.
  - 3. An employee with a cellular telephone benefit must maintain an active cell phone contract for the life of the benefit.
  - 4. The benefit must not exceed the amount of the employee's service plan.
  - 5. If the business usage significantly declines for a sustained period, employee will notify supervisor in writing, as soon as practicable and the amounts may be adjusted.
  - 6. Use of the phone in any manner contrary to local, state, or federal laws will constitute misuse, and will result in immediate termination of the cell phone benefit and possible disciplinary action.
  - 7. If, prior to the end of the cell phone contract, a personal decision by the employee, or employee misconduct, or misuse of the phone, results in the cell phone benefit being discontinued, any fees associated with any change or cancellation of the employee's cell phone plan are solely the responsibility of the employee. For example, if an employee resigns, and no longer wants to retain the current cell phone contract for personal purposes, and cancellation charges will be the employee's responsibility.
  - 8. Employee acknowledges iLEAD Hybrid Employment Guidebook—Use of School Communication Equipment and Technology Guidelines.
  - 9. Employee phone number will be added to iLEAD Hybrid email signature line, business cards, published in an internal iLEAD Hybrid directory, and may be provided both internally and externally for business purposes.
- 5. **Independent Contractors, Consultants, and Non-Employee Board Members:**

- a. Independent Contractors, Consultants, and Non-Employee Board Members are not eligible for a cell phone benefit.

#### **6. Acceptable Use**

- a. iLEAD Hybrid defines acceptable business use as activities that directly or indirectly support the business of iLEAD Hybrid.
- b. Employees may be blocked from accessing certain websites during work hours/ while connected to the corporate network at the discretion of iLEAD Hybrid.
- c. Devices may not be used at any time to:
  - Store or transmit illicit materials;
  - In a way that may be disruptive, harassing or offensive to others;
  - In a manner that is illegal or harmful to morale.
- d. Employees may use their mobile device to access the following company-owned resources: email, calendars, contracts, documents, etc.
- e. iLEAD Hybrid has a zero-tolerance policy for texting or emailing while driving and only hands-free talking while driving is permitted.

#### **7. Devices and Support**

- a. It is strongly encouraged that employees install “Find My Phone” app or other loss prevention app in case of loss or theft. It is the responsibility of the employee to change passwords on all iLEAD Hybrid accounts, such as email accounts as soon as loss or theft occurs.
- b. In order to prevent unauthorized access, devices are to be password protected when not in use.
- c. Devices are not to be shared ownership.
- d. Upon termination of employment, all data belonging to iLEAD Hybrid is to be removed from device.



## **iLEAD California 2022 – 2023 Regular Scheduled Board Meetings**

All meetings will be held at 5:30 p.m. unless otherwise notified.

Special Board Meetings may be scheduled as needed with 24-hour public notice.

August 31, 2022

October 5, 2022

November 2, 2022

November 30, 2022

February 1, 2023

March 1, 2023

March 29, 2023

May 3, 2023

June 21, 2022 (6:00)

June 28, 2022 (6:00)

To: iLEAD California Board

From: MLN - Espi Briones – Corporate Compliance & Special Projects Manager

Date: June 23, 2022

Subject: Insurance Renewal for policy year July 1, 2022-July 1, 2023

iLEAD California participates in the Maker Learning Network Insurance Programs, which includes Risk Management and Insurance Policy Procurement and oversight.

<b>iLEAD California (includes Hybrid)</b>	<b>Premium Indications</b>
General Liability	\$41,924.63
Excess Liability	\$37,493.79
Educators Legal Liability	\$67,405.26
Excess Educators Legal	\$15,312.56
Cyber	\$13,460.68
Crime	\$1,136.92
Student Accident	\$12,190.89
Property	\$9,907.95
<b><i>Total Allocated</i></b>	<b><i>\$198,832.68</i></b>

\*Please note preliminary and subject to change  
when outstanding quotes are received



*Year over Year Exposure & Deductible Summary*

Policy	Current Policy Limit (2021-2022)	Renewal Policy Limit (2022-2023)	Current Policy Deductibles (2021-2022)	Renewal Policy Deductibles (2022-2023)
Package (General Liability, Employee Benefits, Abuse & Molestation & E&O)	\$1M Per occurrence/\$3M Aggregate \$1M Abuse per occurrence \$1M Employee Benefits Liability per occurrence \$25,000,000 Excess	\$1M Per occurrence/\$3M Aggregate \$1M Abuse per occurrence \$1M Employee Benefits Liability per occurrence \$25,000,000 Excess	\$1,000 Employee Benefits	\$1,000 Employee Benefits
Executive Package (Directors & Officers, Employment Practices)	\$1M Per Occurrence/\$1M Aggregate Defense Costs Outside IEP Claims – Excluded \$24,000,000 Excess	\$1M Per Occurrence/\$1M Aggregate Defense Costs Outside IEP Claims – Excluded \$24,000,000 Excess	\$50,000	\$100,000
Fiduciary Liability	\$1,000,000	\$1,000,000	\$2,500	\$2,500
Property	Insured Value: \$41,450,524	Insured Value: \$38,890,830	\$1,000 Property	\$10,000
Crime	\$1,000,000	\$1,000,000	\$10,000	\$10,000
Cyber	\$3,000,000	\$1,000,000	\$25,000	\$25,000

*These policies cover all the MLN entities and iLEAD California is only paying premiums for actual assets. Some coverages may not apply.*

Accept ☐ Reject

General Liability	United Educators
Excess Liability	United Educators
Educators Legal Liability	United Educators
Excess Educators Legal	United Educators
Cyber	Houston Casualty
Crime	Hiscox
Student Accident	United States Fire Insurance Company
Property	Berkshire

*\*Carriers may change if more favorable coverage/pricing is offered from another carrier*

By signing the below, I understand Maker Learning Network has secured terms for insurance policies, which includes coverage for our entity, board, and those listed above. By checking the appropriate box above, and signing below, I am authorizing Maker Learning Network to bind the coverages listed on the renewal policy and remit premiums allocated based on revenue, assets, and student counts, effective 7/1/2022, on our board's behalf.

By: \_\_\_\_\_  
Print name (specify title)

\_\_\_\_\_  
Entity Name

\_\_\_\_\_  
Signature

Date: \_\_\_\_\_

# LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: iLEAD Hybrid

CDS Code: 19753090131987

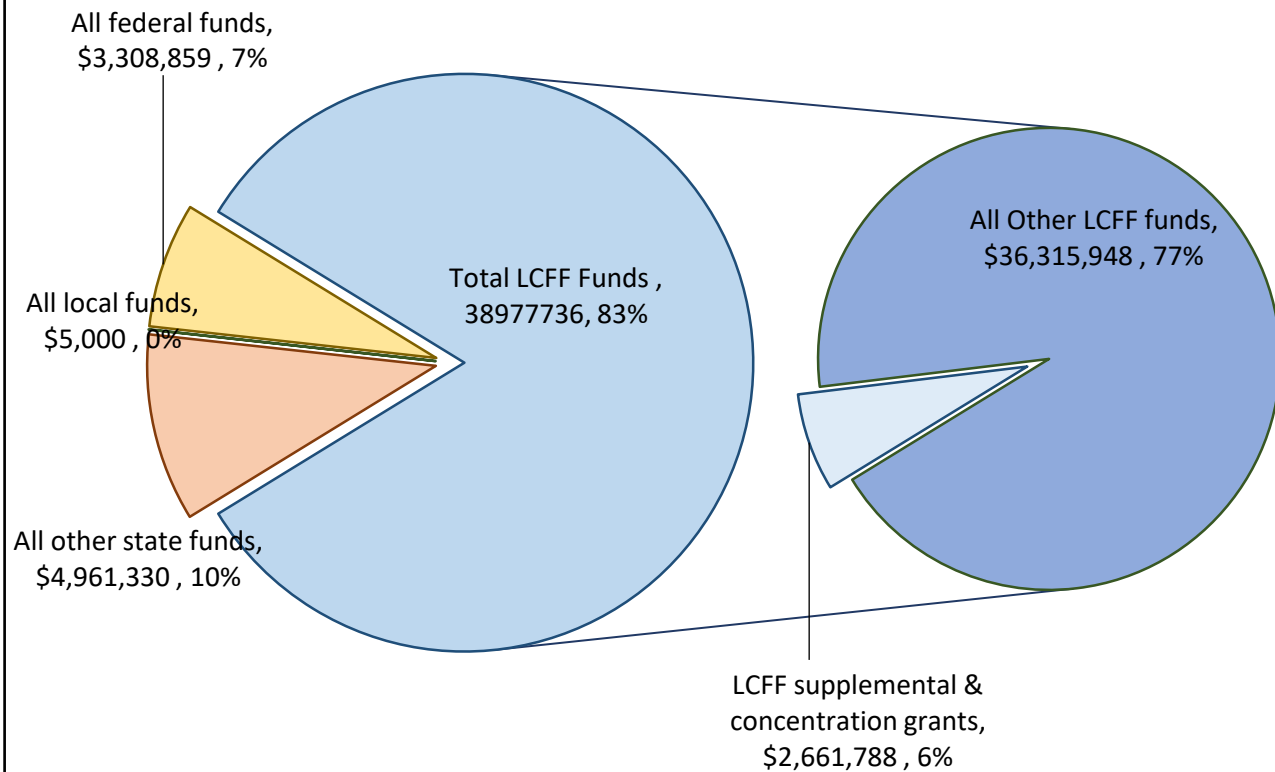
School Year: 2022 – 23

LEA contact information: Amanda Fischer661-904-2481amanda.fischer@ileadschools.org

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

## Budget Overview for the 2022 – 23 School Year

### Projected Revenue by Fund Source

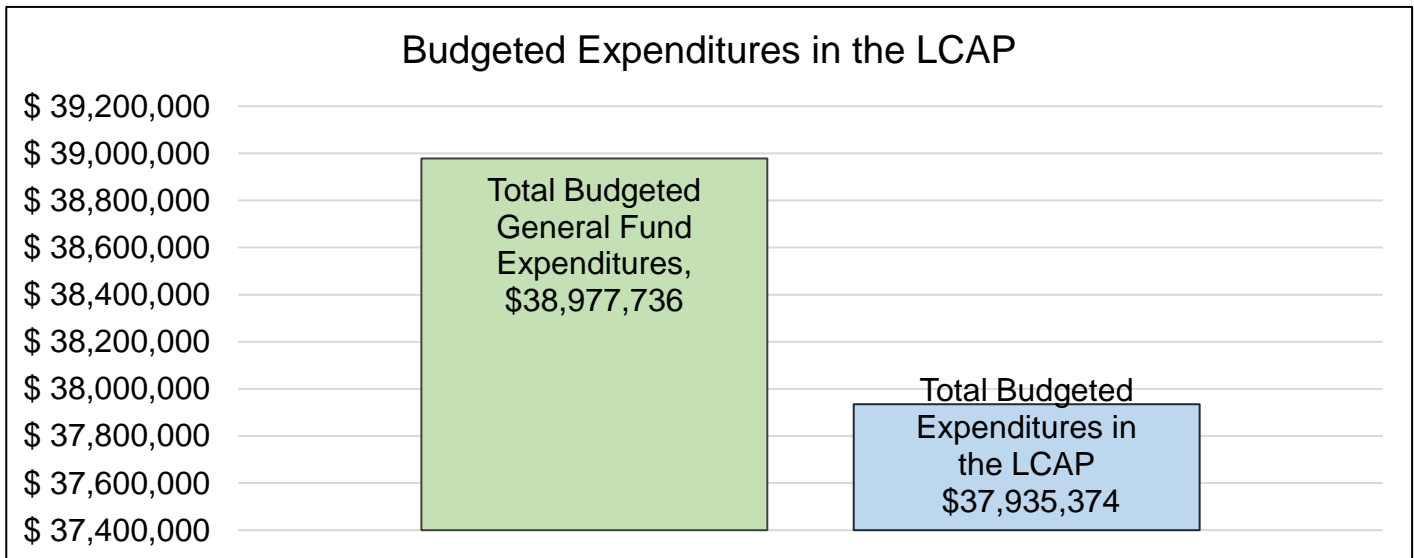


This chart shows the total general purpose revenue iLEAD Hybrid expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for iLEAD Hybrid is \$47,252,925.00, of which \$38,977,736.00 is Local Control Funding Formula (LCFF), \$4,961,330.00 is other state funds, \$5,000.00 is local funds, and \$3,308,859.00 is federal funds. Of the \$38,977,736.00 in LCFF Funds, \$2,661,788.00 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

# LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much iLEAD Hybrid plans to spend for 2022 – 23. It shows how much of the total is tied to planned actions and services in the LCAP.

The text description of the above chart is as follows: iLEAD Hybrid plans to spend \$38,977,736.00 for the 2022 – 23 school year. Of that amount, \$37,935,374.00 is tied to actions/services in the LCAP and \$1,042,362.00 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

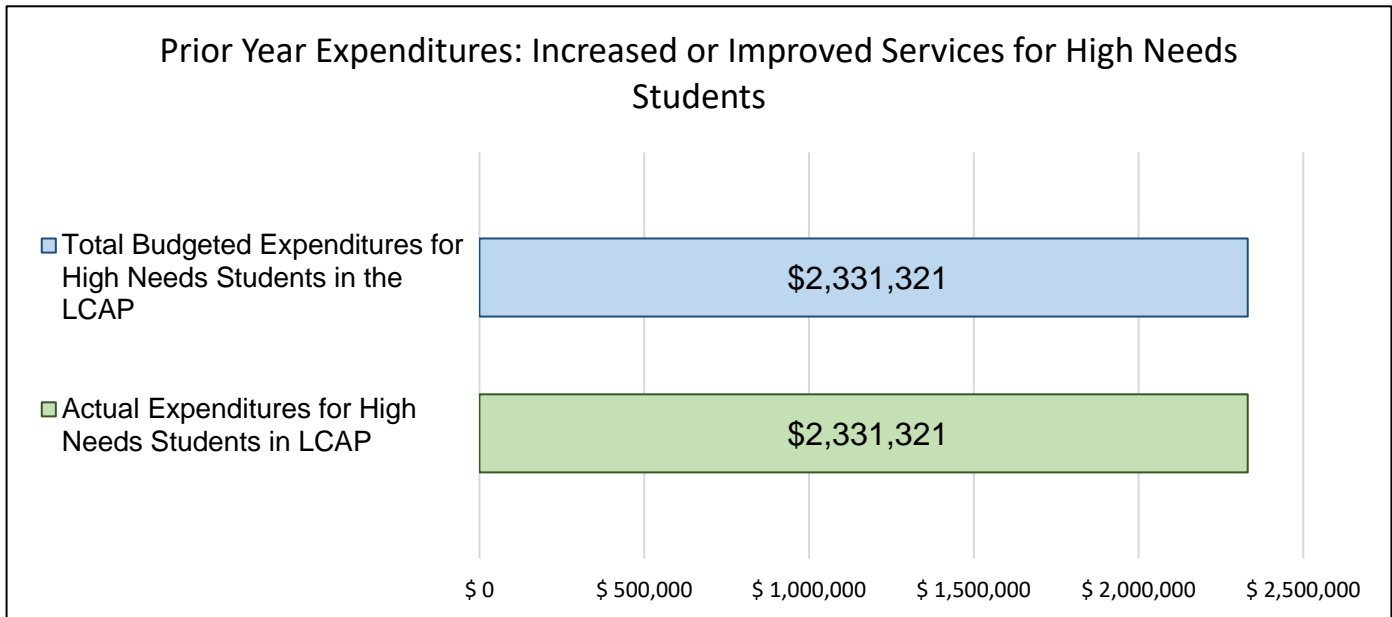
Other school expenses were allocated to state and federal funds. Money was allocated for other school expenses such as legal, business service fees, bank fees, audit fees and interest. Net income of aprox. \$1,000,000.

## Increased or Improved Services for High Needs Students in the LCAP for the 2022 – 23 School Year

In 2022 – 23, iLEAD Hybrid is projecting it will receive \$2,661,788.00 based on the enrollment of foster youth, English learner, and low-income students. iLEAD Hybrid must describe how it intends to increase or improve services for high needs students in the LCAP. iLEAD Hybrid plans to spend \$2,661,788.00 towards meeting this requirement, as described in the LCAP.

# LCFF Budget Overview for Parents

## Update on Increased or Improved Services for High Needs Students in 2021 – 22



This chart compares what iLEAD Hybrid budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what iLEAD Hybrid estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2021 – 22, iLEAD Hybrid's LCAP budgeted \$2,331,321.00 for planned actions to increase or improve services for high needs students. iLEAD Hybrid actually spent \$2,331,321.00 for actions to increase or improve services for high needs students in 2021 – 22.



## Supplement to the Annual Update to the 2021–22 Local Control and Accountability Plan

Board Report Date: February 2, 2022

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
iLEAD Hybrid	Amanda Fischer, Executive Director	(661) 904-2481 amanda.fischer@ileadschools.org

California's 2021–22 Budget Act, the federal American Rescue Plan Act of 2021, and other state and federal relief acts have provided local educational agencies (LEAs) with a significant increase in funding to support students, teachers, staff, and their communities in recovering from the COVID-19 pandemic and to address the impacts of distance learning on students. The following is a one-time mid-year report to the local governing board or body and educational partners related to engagement on, and implementation of, these Acts.

A description of how and when the LEA engaged, or plans to engage, its educational partners on the use of funds provided through the Budget Act of 2021 that were not included in the 2021–22 Local Control and Accountability Plan (LCAP).

In addition to the 2021-2022 Local Control Funding Formula expenditures and the Local Control Accountability Plan (approved in June 2021), the school received one time funding due to the COVID-19 pandemic and the impacts of learning on its learners. iLEAD Hybrid has received the Extended Learning Opportunity Grant. Engagement and consultation with educational partners and the community at large took place through discussions and collaborations in the spring of 2021. The staff, parents, and community at large were notified of the additional funding and planning through parent groups, staff meetings, and at public board meetings.

A description of how the LEA used, or plans to use, the additional concentration grant add-on funding it received to increase the number of staff who provide direct services to students on school campuses with an enrollment of students who are low-income, English learners, and/or foster youth that is greater than 55 percent.

iLEAD Hybrid does not qualify for State concentration grant funding because it does not have the required number of learners who are deemed low-income, English learner, and/or foster youth.

A description of how and when the LEA engaged its educational partners on the use of one-time federal funds received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on pupils.

The school received one time federal funding due to the COVID-19 pandemic and the impacts of learning on its learners. iLEAD Hybrid has received the Elementary and Secondary School Emergency Relief (ESSER) II and III funding. Engagement and consultation with educational partners and the community at large took place with schoolwide information and specific meeting discussions. The learners, staff, parents, and community at large were notified of the additional funding and planning through Monday Messages, learning period newsletters, working with parent groups such as Town Hall and iSUPPORT meetings, during staff meetings, and at public board meetings.

The ESSER III plan was also sent to the school's authorizer, posted to the school website, and submitted to the LA County Office of Education. The school staff, educational partners, Board Members, and community at large reviewed the developed plan for spending in conjunction with the needs of the learners and school as applicable to the funding source. The EL/Homeless/Foster/Migrant administrative support personnel was included in the planning and discussed this information at the ELAC meeting for iLEAD Hybrid's EL learners. State and local requirements were monitored so that the plan remained current to ensure the facilities were prepared to be an ongoing safe space for instruction, social emotional needs were being met, and learning gaps addressed. Support staff communicated with and attended state and local health meetings for pertinent updates. Prior to Board Meetings, the agendas and funding plan was posted at the meeting location and on the public website for all educational partners and the community at large to review. The additional funding sources were also discussed at Board Meetings that are open to the public and community at large (which included opportunities for public comment). Lastly, the special education administrative support team and learner board ambassador were in attendance during the Board Meeting discussions and actions taken to approve these plans as required.

A description of how the LEA is implementing the federal American Rescue Plan Act and federal Elementary and Secondary School Emergency Relief expenditure plan, and the successes and challenges experienced during implementation.

To maintain the health and safety of learners, facilitators, and other staff, iLEAD Hybrid developed and implemented a COVID-19 Safety Plan and Prevention Program (posted on the school's website) which outlined safety protocols. The School Directors have kept families and staff informed on updated COVID safety procedures to support the continuity of services.

Some of the challenges during the 2021-2022 school year have been shortages in staff including staff vacancies and substitute coverage. Additionally, the ongoing changes in state protocols involving potential outbreaks have required extra meetings, revised procedures, and communications on COVID testing, contact tracing, tracking and reporting.

Through the use of one-time COVID relief funding, the school was able to provide a summer program paid for by Extended Learning Opportunity Grant funds to mitigate learning loss. ESSER II and III also provided for a healthcare aide, Chromebooks, math curriculum (Bridges and Math Seeds), staff laptops, substitute coverage, counseling support, rent for additional learning space, and classroom equipment and supplies.

A description of how the LEA is using its fiscal resources received for the 2021–22 school year in a manner that is consistent with the applicable plans and is aligned with the LEA's 2021–22 LCAP and Annual Update.

The Safe Return to In-Person Instruction and Continuity of Services Plan was written to continuously and safely operate schools for in-person learning in a way that reduces or prevents the spread of the COVID-19 virus. 2021-2022 LCAP goals 1, 2 and 3 were written in part to ensure school safety, target children below proficiency, mitigate learning loss, support social emotional learning, and provide school equipment/technology as needed. The one-time funding has and will continue to provide additional opportunities to put these plans in action by providing the ability to purchase additional materials, curriculum, technology, training, and support as outlined above to meet the ongoing needs of learners.



# Instructions for the Supplement to the Annual Update for the 2021–22 Local Control and Accountability Plan Year

*For additional questions or technical assistance related to the completion of the Supplement to the Annual Update to the 2021–22 Local Control and Accountability Plan (LCAP), please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at [lcff@cde.ca.gov](mailto:lcff@cde.ca.gov).*

## Introduction

California's 2021–22 Budget Act, the federal American Rescue Plan Act of 2021, and other state and federal relief acts have provided local educational agencies (LEAs) with a significant increase in funding to support students, teachers, staff, and their communities in recovering from the COVID-19 pandemic and to address the impacts of distance learning on students. Section 124(e) of Assembly Bill 130 requires LEAs to present an update on the Annual Update to the 2021–22 LCAP and Budget Overview for Parents on or before February 28, 2022, at a regularly scheduled meeting of the governing board or body of the LEA. At this meeting, the LEA must include all of the following:

- The Supplement to the Annual Update for the 2021–22 LCAP (2021–22 Supplement);
- All available mid-year outcome data related to metrics identified in the 2021–22 LCAP; and
- Mid-year expenditure and implementation data on all actions identified in the 2021–22 LCAP.

When reporting available mid-year outcome, expenditure, and implementation data, LEAs have flexibility to provide this information as best suits the local context, provided that it is succinct and contains a level of detail that is meaningful and accessible for the LEA's educational partners.

The 2021–22 Supplement is considered part of the 2022–23 LCAP for the purposes of adoption, review, and approval, and must be included with the LCAP as follows:

- The 2022–23 Budget Overview for Parents
- The 2021–22 Supplement
- The 2022–23 LCAP
- The Action Tables for the 2022–23 LCAP
- The Instructions for the LCAP Template

As such, the 2021–22 Supplement will be submitted for review and approval as part of the LEA's 2022–23 LCAP.

## Instructions

Respond to the following prompts, as required. In responding to these prompts, LEAs must, to the greatest extent practicable, provide succinct responses that contain a level of detail that will be meaningful and accessible for the LEA's educational partners and the broader public and must, to the greatest extent practicable, use language that is understandable and accessible to parents.

In responding to these prompts, the LEA has flexibility to reference information provided in other planning documents. An LEA that chooses to reference information provided in other planning documents must identify the plan(s) being referenced, where the plan(s) are located (such as a link to a web page), and where in the plan the information being referenced may be found.

**Prompt 1:** *“A description of how and when the LEA engaged, or plans to engage, its educational partners on the use of funds provided through the Budget Act of 2021 that were not included in the 2021–22 Local Control and Accountability Plan (LCAP).”*

In general, LEAs have flexibility in deciding what funds are included in the LCAP and to what extent those funds are included. If the LEA received funding through the Budget Act of 2021 that it would have typically included within its LCAP, identify the funds provided in the Budget Act of 2021 that were not included in the LCAP and provide a description of how the LEA has engaged its educational partners on the use of funds. If an LEA included the applicable funds in its adopted 2021–22 LCAP, provide this explanation.

**Prompt 2:** *“A description of how LEA used, or plans to use, the concentration grant add-on funding it received to increase the number of staff who provide direct services to students on school campuses with an enrollment of students who are low-income, English learners, and/or foster youth that is greater than 55 percent.”*

If LEA does not receive a concentration grant or the concentration grant add-on, provide this explanation.

Describe how the LEA is using, or plans to use, the concentration grant add-on funds received consistent with California *Education Code* Section 42238.02, as amended, to increase the number of certificated staff, classified staff, or both, including custodial staff, who provide direct services to students on school campuses with greater than 55 percent unduplicated pupil enrollment, as compared to schools with an enrollment of unduplicated students that is equal to or less than 55 percent.

In the event that the additional concentration grant add-on is not sufficient to increase the number of staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, describe how the LEA is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

**Prompt 3:** *“A description of how and when the LEA engaged its educational partners on the use of one-time federal funds received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on pupils.”*

If the LEA did not receive one-time federal funding to support recovery from the COVID-19 pandemic and the impacts of distance learning on students, provide this explanation.

Describe how and when the LEA engaged its educational partners on the use of one-time federal funds it received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on students. See the COVID-19 Relief Funding Summary Sheet web page (<https://www.cde.ca.gov/fg/cr/relieffunds.asp>) for a listing of COVID-19 relief funding and the Federal Stimulus Funding web page (<https://www.cde.ca.gov/fg/cr/>) for additional information on these funds. The LEA is not required to describe engagement that has taken place related to state funds.

**Prompt 4:** “A description of how the LEA is implementing the federal American Rescue Plan Act and federal Elementary and Secondary School Emergency Relief expenditure plan, and the successes and challenges experienced during implementation.”

If an LEA does not receive ESSER III funding, provide this explanation.

Describe the LEA’s implementation of its efforts to maintain the health and safety of students, educators, and other staff and ensure the continuity of services, as required by the federal American Rescue Plan Act of 2021, and its implementation of the federal Elementary and Secondary School Emergency Relief (ESSER) expenditure plan to date, including successes and challenges.

**Prompt 5:** “A description of how the LEA is using its fiscal resources received for the 2021–22 school year in a manner that is consistent with the applicable plans and is aligned with the LEA’s 2021–22 LCAP and Annual Update.”

Summarize how the LEA is using its fiscal resources received for the 2021–22 school year to implement the requirements of applicable plans in a manner that is aligned with the LEA’s 2021–22 LCAP. For purposes of responding to this prompt, “applicable plans” include the Safe Return to In-Person Instruction and Continuity of Services Plan and the ESSER III Expenditure Plan.

California Department of Education  
November 2021

# Local Control and Accountability Plan

The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
iLEAD Hybrid	Amanda Fischer Executive Director	amanda.fischer@ileadschools.org 661-904-2481

## Plan Summary 2022-2023

### General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten-12, as applicable to the LEA.

iLEAD Hybrid, located in southern California, is a nonclassroom-based, WASC accredited, public charter school with 3,827 TK-12 learners enrolled during the 2021-22 school year. The school opened in 2015, and its current population is 41.1% White; 33% Hispanic or Latino; 10% Two or More Races; 6.1% African American; 5.3% Asian; 3% Not Reported; 1% Filipino; 0.3% American Indian or Alaska Native; and 0.2% Pacific Islander. 37% of iLEAD Hybrid learners qualify for free and reduced meals. The school serves independent study learners in the counties of Los Angeles, Orange, Kern, San Bernardino, and Ventura.

iLEAD Hybrid offers a learner-centered approach to education that focuses on personalized learning options, interdisciplinary project-based learning at its learning studios, and social-emotional learning principles while adhering to the Common Core Standards. Social-Emotional Learning (SEL) is the process through which children and adults understand and manage emotions, set and achieve positive goals, feel and show empathy for others, establish and maintain positive relationships, and make responsible decisions. iLEAD Hybrid’s Schoolwide Learner Outcomes were carefully selected to develop the whole child with a focus on both academic and social-emotional learning. These include: academic rigor, college and career readiness, critical thinking, curiosity, gratitude, grit, growth mindset, optimism, purpose, self control, social intelligence, and zest. Twice a year, learners and facilitators reflect together on student growth in each of these areas through use of the iLEAD Comprehensive Growth Card.

iLEAD Hybrid’s School Programs

1) iLEAD Exploration

iLEAD Exploration is the independent study component of iLEAD Hybrid serving learners in grades TK-12. It is a program that supports educational options and flexibility, as many learners are pursuing outside passions such as sports, theater arts, music, acting, etc. while enrolled in the Exploration program. Exploration meets the needs of families who prefer independent study, personalized learning options for their children under the guidance of a credentialed facilitator. All learners work with facilitators to select a standards-based curriculum that supports their learning style. Additionally, many of the learners take courses at vetted and approved educational vendors throughout Southern California and have access to online courses. The OC Studio serves learners in grades K-8, offering in-person classes twice a week. Science and social studies topics are explored through project-based learning, book studies, and learning fairs.

Through the guidance of academic counselors, Exploration’s high school program continues to prepare learners for college and career through college-prep a-g coursework, AP classes, Career Technical Education (CTE), college credit courses, and other work-based learning opportunities.

The iLEAD Exploration program offers many engaging activities for family involvement. Some of these events include Parent University webinars, a talent show, book clubs, science fairs, and end of year celebrations.

## 2) iLEAD Antelope Valley

iLEAD Antelope Valley (AV) serves independent study learners in grades TK-8. This hybrid independent study option offers interdisciplinary project-based learning under the guidance of a grade-level credentialed facilitator. Learners attend direct, in-person instruction two days per week at the Lancaster studio. The studio also offers many enrichment activities throughout the year to develop community and showcase learning. School staff cultivates community through school events such as its Fall Festival and Winter Production.

## 3) iLEAD Hybrid Antelope Valley Exploration

iLEAD Hybrid Antelope Valley Exploration utilizes innovative methods of delivering quality project-based and social-emotional learning to independent study learners in grades TK-8. Developed as a result of the COVID-19 pandemic and new California charter legislation, the program provides guidance to families who prefer academic support through an independent study program. Learners are assigned a credentialed facilitator according to grade level spans where they utilize projects and a core curriculum. Instructional funds are used to support and enhance each learner's individualized learning plan with extracurriculars and enrichment classes. Workshops are offered twice a week in the areas of art, physical education, STEAM, performing arts, yoga, mindfulness, thematic units incorporating language arts, math, science, and social studies, and remedial help in math and ELA.

All three programs within iLEAD Hybrid utilize thoughtfully-designed personal learning environments and have implemented professional learning on diversity, equity, and inclusion. It is iLEAD Hybrid's goal to build an engaging and rigorous educational experience with a focus on each learner's unique strengths to cultivate a love for learning. School staff works with each learner to develop an individualized learning plan with an emphasis on academic and SEL goals. The staff also incorporates a variety of methods and best practices including professional learning, implementation of intentional teaching strategies, analysis of learner performance data, Multi-Tiered Systems of Support (MTSS), and the revision of instruction as necessary to educate all learners and address the unique needs of English Learners (2.3%), Students with Disabilities (13.8%), Socioeconomically Disadvantaged (37.4%), those experiencing Homelessness (less than 1%), and Foster Youth (less than 1%). At iLEAD Hybrid, personalized learning includes supporting English learners with integrated and designated language support during the school day and Students with Disabilities according to the needs of their individualized education plans providing them with the least restrictive environment possible.

Learner performance and achievement are measured by a variety of summative and formative assessments that are aligned to state standards and reflect proficiency measures required by the California Assessment of Student Performance and Progress (CAASPP). To support instructional decision making, the school utilizes NWEA MAP (Measures of Academic Progress), an adaptive assessment tool approved by the California Department of Education (CDE), as one of several measures to monitor learner progress throughout the year.

Depending on the program and grade level span, iLEAD Hybrid also provides numerous school activities and events such as clubs, enrichment classes, workshops, webinars, community events, and aerospace opportunities.

# Reflections: Successes

A description of successes and/or progress based on a review of the California School Dashboard (Dashboard) and local data.

During the 2021-22 school year, iLEAD Hybrid successfully:

- Launched its newest program, iLEAD Hybrid AV Exploration, with enrollment ending at 144.
- Awarded 60 graduates the Golden Merit Diploma and 3 graduates the State Seal of Biliteracy.
- Implemented the SLOgan campaign, where a specific Schoolwide Learner Outcome was the central focus of the month.
- Trained all staff in diversity, equity and inclusion.
- Opened a second curriculum library in Acton.
- Implemented MTSS to support, monitor and track all learners.
- Encouraged learners to participate in state testing (and had its highest participation rate in the school's history).
- Hosted its second, highly successful college fair.
- Reclassified 15.2% of EL learners during the 2020-21 school year.

- Made significant campus repairs at its AV studio.
- Supported families through engaging school events and synchronous instruction resulting in a low chronic absenteeism rate.

## Reflections: Identified Need

A description of any areas that need significant improvement based on a review of Dashboard and local data, including any areas of low performance and significant performance gaps among student groups on Dashboard indicators, and any steps taken to address those areas.

With the most recent data on the CA School Dashboard still reflecting 2019 data (due to it being suspended during the COVID-19 pandemic), the school maintains its emphasis on the identified needs from 2021-22. This includes:

-Academic Achievement: ELA

iLEAD Hybrid was 15.1 points below standard on the 2019 CA School Dashboard (the state was 2.5 points below standard)

On the CA School Dashboard, African American and White are in the orange tier.

-Academic Achievement: Math

iLEAD Hybrid was 68.9 points below standard on the 2019 CA School Dashboard (the state was 33.5 points below standard)

On the CA School Dashboard, African American, Socioeconomically Disadvantaged, and Students With Disabilities are in the red tier, and Hispanic and White are in the orange tier.

-Improve CAASPP test participation

-Increase the percentage of learners graduating as prepared

The 2019 CA School Dashboard shows that 25.8% of iLEAD Hybrid learners graduated as prepared (compared to the state's percentage of 44.1%).

-Improve graduation rates for iLEAD Hybrid

The 2019 CA School Dashboard shows that 69.9% of iLEAD Hybrid learners graduated (compared to the state's percentage of 85.8%).

Four additional identified needs involve:

-Ensuring the social-emotional well-being of learners are being met as a result of the pandemic.

-Ongoing monitoring of teacher credentialing.

-Increase professional development opportunities for staff.

-Recruitment and retention of staff as a result of the pandemic.

## LCAP Highlights

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

Goal 1: Provide optimal conditions of learning through providing basic services, implementation of California Content Standards (CCS), and access to an academic and educational program as outlined in iLEAD Hybrid's Charter.

Key Features: The actions and services supporting goal #1 provide full funding for credentialed and classified staff salaries to support all student groups. It supplies all learners with personalized learning options through Project Based Learning coursework and/or curriculum aligned to state standards, as well as technology to increase learner engagement and success. It provides for a clean, safe, and well-maintained campus. School staff will receive professional learning on topics such as diversity, equity and inclusion, PBL, SEL, best practices, and academic content to increase the effectiveness of instruction to learners. Using MTSS, the school will support learners with enrichment and/or intervention strategies as needed in their academic and social emotional learning.

Goal 2: Provide all learners with a rigorous, creative, and broad curriculum to maximize academic achievement and college/career readiness.

Key Features: The actions and services supporting goal #2 enable school staff to further develop and utilize internal monitoring systems to support academic and social-emotional growth and achievement across student groups including EL learners, socioeconomically disadvantaged, foster youth and those experiencing homelessness. This includes analysis of academic and SEL data to close achievement gaps in ELA and math. Action steps to support ongoing high school program development for college and career readiness (as indicated on the CA School Dashboard) will expand high school opportunities for learners.

Goal 3: Generate active engagement between parents, families and the school as well as connections with the community, to promote learner achievement and communication among all educational partners.

Key Features: The actions and services supporting goal #3 include ongoing educational partner engagement and the fostering of connectedness through school/community events and activities. It also includes supporting the mental health and wellness of all learners. Additional services and/or resources will be provided to EL learners, socioeconomically disadvantaged, foster youth, and those experiencing homelessness based on individual needs.

# Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

## *Schools Identified*

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

None.

## *Support for Identified Schools*

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

Not applicable.

## *Monitoring and Evaluating Effectiveness*

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

Not applicable.

# Engaging Educational Partners

A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP.

iLEAD Hybrid is committed to the meaningful engagement of its educational partners in the development of the LCAP. For the annual update, feedback from families, learners, community members, board members, learners, and iLEAD Hybrid staff and leadership was utilized to evaluate program effectiveness and address the state priorities. Upon careful examination of the input received, action steps under iLEAD Hybrid's three existing goals were maintained, expanded or modified to further learner achievement and continue the development of program offerings.

During the 2021-22 school year, monthly parent meetings were held at iLEAD AV, while iLEAD Exploration held three virtual town hall meetings over the course of the year. This allowed opportunity for school staff and families to connect regarding the school program. Informal feedback was also received by families through monthly learning period meetings and at schoolwide events. ELAC meetings were held on 10/7/21 and 2/9/22 to provide an open forum for questions and feedback on the EL program. Additionally, monthly EL collaborations with the EL coordinators across iLEAD Schools provided the opportunity for sharing ideas gathered from facilitator and family feedback on how to improve the English learner program. The WASC mid-cycle visit occurred in the spring of 2022 and focus groups (including parents, learners, school staff, leadership, and other community members) met to reflect on their mid-cycle report prior to the visit. Feedback was also received from the WASC visit itself.

iLEAD Exploration conducted staff surveys twice during the 2021-22 school year to gather feedback on general operations and leadership. Twice a year, learners and staff completed the iLEAD Comprehensive Growth Card, a measure of learner growth in the Schoolwide Learner Outcomes, as well as their progress towards academic and social-emotional goals. Additionally, staff and leadership meetings were held monthly to discuss the program, learner progress, and gather/reflect on suggestions for improvements. Parent and learner surveys regarding aspects of the program were sent in the spring of 2022 to solicit feedback. These surveys addressed specific



aspects of the LCAP (the eight state priorities for the creation of potential action steps). Various learner clubs allowed opportunities for discussion and feedback. Additionally, in the spring of 2022, iLEAD Schools' Equity Task Force also conducted listening sessions and/or facilitated surveys of staff, leadership and learners.

Monthly board meetings were held virtually with the opportunity for anyone from the public to attend (including staff, parents and learners). On June 22, 2022, a public hearing was held for additional feedback before the LCAP was board approved on June 29, 2022.

### A summary of the feedback provided by specific educational partners.

As a result of the pandemic, families and staff observed an increased number of learners experiencing feelings of depression, anxiety and/or in need of other mental health support. Learners also reflected this sentiment through self-evaluation on the iLEAD Comprehensive Growth Card. There is varying feedback on the rigor of academics, as indicated by parent surveys, learner achievement of academic goals, staff feedback and the 2019 CA School Dashboard data. Academic data on internal benchmarks and the 2019 CA State Dashboard show areas for growth, and learners are benefitting from additional tutoring and academic resources provided through synchronous instruction and more frequent check-ins. The WASC mid-cycle report and visit provided areas of focus that were also included in the LCAP. Areas for improvement include: college career readiness, graduation rates, recruitment and retainment of qualified staff, ongoing refinement of the MTSS process, and utilizing effective processes to measure and track all learner achievement. The high school team continues to work closely with all learners to increase college and career readiness, and are seeing a need to increase the number of community partnerships provided to unduplicated leaders.

### A description of the aspects of the LCAP that were influenced by specific input from educational partners.

Diversity, Equity, and Inclusion, MTSS, and Staff Retention (Goal 1): There is an ongoing need for building awareness in the area of diversity, equity and inclusion. School staff continue to work on developing MTSS so that all struggling learners are receiving the support needed. As a result of the pandemic, there is also a need to increase the retention rate of staff.

Academic Achievement and College-Career Readiness (Goal 2): The high school team is dedicated to increasing the number of learners who are graduated as prepared, and school staff is working to refine their monitoring processes to ensure achievement for all learners.

Social-Emotional Well-Being and Learner Engagement (Goal 3): Putting social-emotional needs first is critical, as it affects academic achievement and learner engagement. Families of low income, foster/homeless and EL learners could benefit from additional counseling support and community resources.

# Goals and Actions

## Goal

Goal #	Description
1	Provide optimal conditions of learning through providing basic services, implementation of California Content Standards (CCS), and access to an academic and educational program as outlined in iLEAD Hybrid's charter.

An explanation of why the LEA has developed this goal.

All learners are entitled to a rigorous and broad course of study, highly qualified teachers, standards-based learning/curriculum, current technology, well-maintained schools, and individualized support. Thus, the purpose of this goal is to provide optimal conditions of learning for all learners, ensuring access with appropriate supports and multiple forms of intervention based on each learner's need(s). Providing equity for all learners addresses the fact that not all students learn in the same ways, and many have individualized needs compared with their peers. Ongoing professional learning in diversity, equity and inclusion, best practices in education, as well as iLEAD cultural pieces to include social-emotional learning, will further improve the development of adaptive, inclusive learning environments.

This goal addresses the following State Priorities:  
Priority 1: Basic Services (Conditions of Learning)  
Priority 2: State Standards (Conditions of Learning)  
Priority 7: Course Access (Conditions of Learning)

## Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023-2024
SARC	2019-20 SARC: 16 Misassignments of Teachers of English Learners 18 Total Teacher Misassignments	2020-21 SARC: 16 Misassignments of Teachers of English Learners 18 Total Teacher Misassignments			0 Misassignments of Teachers 0 Misassignments of EL Learners
CA School Dashboard Local Indicator: Percent Of Students Without Access To Their Own Copies Of	2019 CA School Dashboard Local Indicator: 0% Percent Of Students Without Access To Their	2019 CA School Dashboard Local Indicator: 0% Percent Of Students Without Access To Their			0% Percent Of Students Without Access To Their Own Copies Of Standards-Aligned Instructional Materials For Use At School And At Home

Standards-Aligned Instructional Materials For Use At School And At Home	Own Copies Of Standards-Aligned Instructional Materials For Use At School And At Home	Own Copies Of Standards-Aligned Instructional Materials For Use At School And At Home			
SARC	<p>2019-20: The school was rated with a "good" status as measured by the Facility Inspections Tools (FIT) on the School Accountability Report Card (SARC).</p> <p>2020-21: The school was rated with a ""good"" status as measured by the Facility Inspections Tools (FIT) on the School Accountability Report Card (SARC).</p>	2020-21: The school was rated with a "good" status as measured by the Facility Inspections Tools (FIT) on the School Accountability Report Card (SARC).			The school will be rated with a "good" status as measured by the Facility Inspections Tools (FIT) on the School Accountability Report Card (SARC).
2019 CA School Dashboard Local Indicator: Implementation of Academic Standards	2019 CA School Dashboard Local Indicators: Implementation of Academic Standards: Standard Met	2019 CA School Dashboard Local Indicators: Implementation of Academic Standards: Standard Met			Implementation of Academic Standards: Standard Met
CA School Dashboard: English Learner Progress	2019 English Learner Progress: 51.3% making progress towards English language proficiency	2019 English Learner Progress: 51.3% making progress towards English language proficiency			English Learner Progress: 55% making progress towards English language proficiency
Professional Learning Attendance	2019-20: 100% of staff have engaged in professional learning to improve learner outcomes.	2020-21: 100% of staff have engaged in professional learning to improve learner outcomes.			100% of staff will have engaged in professional learning to improve learner outcomes.

CA School Dashboard Local Indicator: Access to a Broad Course of Study	2019 CA School Dashboard: Access to a Broad Course of Study: Standard Met	2019 CA School Dashboard: Access to a Broad Course of Study: Standard Met			Access to a Broad Course of Study: Standard Met
CA School Dashboard Local Indicator: Basics: Teachers, Instructional Materials, Facilities	2019 CA School Dashboard Local Indicator: Basics: Teachers, Instructional Materials, Facilities: Standard Met	2019 CA School Dashboard Local Indicator: Basics: Teachers, Instructional Materials, Facilities: Standard Met			Basics: Teachers, Instructional Materials, Facilities: Standard Met
Paycom	2020-21: 85.93% staff retention rate	2020-21: 85.93% staff retention rate			89% staff retention rate
CA School Dashboard: College/Career Levels and Measures Report and Data	Based on the 2019 CA School Dashboard: A-G: 18.1% fulfilled the A-G measure College Credit Courses: 25.3% fulfilled the college credit measure AP: 6% fulfilled the AP measure CTE: 0% fulfilled the CTE measure	Based on the 2019 CA School Dashboard: A-G: 18.1% fulfilled the A-G measure College Credit Courses: 25.3% fulfilled the college credit measure AP: 6% fulfilled the AP measure CTE: 0% fulfilled the CTE measure			A-G: 21% fulfilled the A-G measure College Credit Courses: 30% fulfilled the college credit measure AP: 8% fulfilled the AP measure CTE: 2% fulfilled the CTE measure
Panorama Survey	2021: 96% of iLEAD Exploration and 67% of iLEAD AV parents/guardians feel the curriculum, courses, and resources available through the school are engaging/motivating, meet their learner's needs, and are preparing them for next year.	2022: 96% of iLEAD Exploration and 91% of iLEAD AV parents/guardians feel the curriculum, courses, and resources available through the school are engaging/motivating, meet their learner's needs, and are preparing them for the next school year.			97% of iLEAD Exploration and 93% of iLEAD AV parents/guardians feel the curriculum, courses, and resources available through the school are engaging/motivating, meet their learner's needs, and are preparing them for the next school year.
MTSS Data	During the 2021-22 school year, 19% of all learners engaged in MTSS returned to tier one upon receiving interventions.	During the 2021-22 school year, 19% of all learners engaged in MTSS returned to tier one upon receiving interventions.			22% of all learners engaged in MTSS reengaged to tier one upon receiving interventions.

# Actions

Action #	Title	Description	Total Funds	Contributing
1	Fully Credentialed and Appropriately Assigned Staff	Recruit, fund, and retain credentialed teachers (base teacher salaries and benefits) who will be assigned to appropriate classrooms in order to provide instruction for all learners. (State Priority #1, WASC Goal 3).	\$16,509,741.00	No
2	High Needs Support Team	Dedicate staff to support unduplicated learners in their academic and social emotional achievement (State Priority #1).	\$1,683,688.00	Yes
3	Access to Standards-Aligned Instructional Materials	School leadership and facilitators will ensure that all learners have access to standards-aligned instructional materials and technology (State Priority #1).	\$9,230,472.00	No
4	School Facilities	The facilities team and onsite staff will ensure all learners and facilitators have clean, safe, innovative spaces in which to conduct onsite learning activities (State Priority #1).	\$575,712.00	No
5	Curriculum Offerings and Implementation of State Standards (repeated expenditure, Goal 1, Action 3)	School staff will research, develop, and/or implement resources and curriculum offerings for a broad course of study that ensures general alignment to the California Content Standards while allowing for freedom of innovation with instruction and/or project design for all learners leading to college and career readiness (State Priorities #2 & #7).	\$0.00	No
6	ELD Implementation of State Standards	The EL Coordinator and school staff will apply professional learning to provide English Learners with support for academic achievement through additional language support, ELlevation progress monitoring system, and other evidence-based resources that support inclusive learning environments (State Priority #2, WASC #1).	\$178,100.00	Yes
7	Professional Learning	All staff will engage in a variety of professional learning on best practices and first best instruction, utilizing the California Content Standards, to increase the effectiveness of instruction to all learners. School staff will also be trained on other iLEAD cultural and instructional practices such as diversity, equity, and inclusion, Restorative Practices, PBL, SEL, Love and Logic, and/or 7 Habits as needed (State Priority #2).	\$1,549,875.00	No
8	Staff Recruitment and Retention	Recruit and retain highly qualified, caring, and skilled educators and staff until retention and recruitment revert to pre-pandemic levels (State Priority #1, WASC #2).	\$21,269.00	No
9	High School Course Access (repeated expenditure, Goal 1, Action 3)	School staff will increase the percentage of high schoolers who complete CA School Dashboard's college and career readiness measures including A-G coursework, college credit courses, AP, and/or CTE (State Priority #7).	\$0.00	No
10	Multi-Tiered Systems of Support	School staff will be provided professional learning to teach/model the iLEAD Learner Outcomes as a framework for a rigorous project-based curriculum. Using MTSS, the school will support all learners with enrichment and/or intervention strategies as needed in their academic and social emotional learning (State Priority #7, WASC #5).	\$2,792,493.00	No

# Goal Analysis for 2021-2022

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Goal #1 was efficiently implemented during the 2021-22 school year. All learners had access to curriculum, technology, and a broad course of study. Staff received professional learner to improve learner outcomes. There were no substantive differences in planned actions and the actual implementation of these actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

During the 2021-22 school year, some of the cost of school staff and/or facilities was reallocated to state and/or federal funds.

An explanation of how effective the specific actions were in making progress toward the goal.

During the 2021-22 school year, several reparations were made to the facilities at the AV studio. MTSS was implemented, with some learners successfully reengaging at tier one. One-to-one technology promoted learner engagement and success. The school implemented synchronous and asynchronous instruction to its learners. Amongst other professional learning, the staff was trained in diversity, equity and inclusion.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

For the 2022-23 school year, the planned goal remains the same. Upon careful analysis of the eight state priorities, the school strategically realigned its actions under each of the three goals so that the state priorities aligned with the goal. Goal one pertains to conditions for learning, which includes Priority 1: Basic Services; Priority 2: State Standards; and Priority 7: Course Access. The school also ensured that all measurable outcomes required by the state were included in this year's LCAP. Upon reflection of prior practice, the school added in an action about MTSS. Any actions under other goals in the LCAP pertaining to professional learning were incorporated under goal one. In the 2021-22 LCAP, there was a financial data entry error that caused all actions to repeat multiple times, so all actions were removed per LACOE's instructions and reentered so that the actions did not repeat themselves.

**A report of the Total Estimated Actual Expenditures for last year’s actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year’s actions may be found in the Contributing Actions Annual Update Table.**

# Goal

Goal #	Description
2	Provide all learners with a rigorous, creative, and broad curriculum to maximize academic achievement and college/career readiness.

An explanation of why the LEA has developed this goal.

This goal emphasizes a continued focus on student achievement across all student groups to include increased ELA and math achievement on both state assessments and NWEA MAP (a California Department of Education (CDE)-approved, internal diagnostic assessment). The goal is to prepare learners academically and social-emotionally through project-based learning and/or personalized learning opportunities that align with state standards. Learner and credentialed teacher (facilitator) feedback on the iLEAD Comprehensive Growth Card, a measure on social-emotional, academic and personal goal-setting, also indicate a need for growth in academic achievement. Additionally, there is a need to concentrate efforts on the percentage of high schoolers graduating as prepared as indicated on the California School Dashboard's college/career indicator.

This goal addresses the following State Priorities:

Priority 4: Pupil Achievement (Pupil Outcomes)

Priority 8: Other Pupil Outcomes (Pupil Outcomes)

## Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023-2024
CA School Dashboard State Indicator: ELA and Math CAASPP Testing Scores DataQuest: School Dashboard Additional Reports and Data - CAASPP Participation Rates  NWEA MAP CGI Index NWEA MAP Participation Rates	All Students 2019 DataQuest: 76% Participation Rate - ELA 77% Participation Rate - Math  All Students 2019 CA School Dashboard ELA: 15.1 points below standard/maintained 2.2 (orange) Math: 68.9 points below standard/declined 6.7 (orange)  NWEA MAP Spring 2022	Same as baseline.			95% CAASPP Participation - ELA & Math CAASPP: Due to suspension of the CA School Dashboard during COVID and use of an alternative testing measure (NWEA MAP) approved by the state of CA, the school will recalibrate CAASPP desired outcomes once spring 2022 CAASPP scores are received in the fall of 2022.  All Students NWEA MAP: 95% Participation ELA & Math All Students NWEA MAP Reading CGI 0 All Students NWEA MAP Math CGI 0

	<p>All Students Participation Rate - Reading 92.93% of iLEAD Exploration and 89.10% of iLEAD AV learners</p> <p>NWEA MAP Spring 2022 All Students Participation Rate - Math 93.16% of iLEAD Exploration and 89.34% of iLEAD AV learners</p> <p>iLEAD Exploration: NWEA MAP Spring 2022 All Students Reading CGI -1.33 NWEA MAP Spring 2022 All Students Math CGI -0.93</p> <p>iLEAD AV: NWEA MAP Spring 2022 All Students Reading CGI -1.74 NWEA MAP Spring 2022 All Students Math CGI -2.09</p>				
CA School Dashboard State Indicator: College and Career Indicator	2019 CA School Dashboard: 25.8% of all students graduated as prepared/declined 16.2% (orange)	Same as baseline.			44.1% of all students graduated as prepared
EL Learners: CA School Dashboard State Indicator: ELA and Math CAASPP Testing Scores DataQuest: School Dashboard Additional Reports	<p>EL Learners 2019 DataQuest: 91% Participation Rate - ELA 89% Participation Rate - Math</p> <p>EL Learners 2019 CA</p>	Same as baseline.			<p>95% CAASPP Participation - ELA &amp; Math</p> <p>CAASPP: Due to suspension of the CA School Dashboard during COVID and use of an alternative testing measure (NWEA MAP) approved by the state of CA, the school will recalibrate CAASPP desired outcomes once spring</p>



and Data - CAASPP Participation Rates  CA School Dashboard State Indicator: College and Career Indicator	School Dashboard: ELA: 41.4 points below standard/increased 50.3 points (yellow) Math: 87.2 points below standard/increased 38 points (yellow)  2019 CA School Dashboard: College and Career Indicator N/A (less than 11 students)				2022 CAASPP scores are received in the fall of 2022. CA School Dashboard: The school will set desired outcome once baseline data is available.
Socioeconomically Disadvantaged: CA School Dashboard State Indicator: ELA and Math CAASPP Testing Scores DataQuest: School Dashboard Additional Reports and Data - CAASPP Participation Rates  CA School Dashboard State Indicator: College and Career Indicator	Socioeconomically Disadvantaged 2019 DataQuest: 79% Participation Rate - ELA 80% Participation Rate - Math  Socioeconomically Disadvantaged 2019 CA School Dashboard: ELA: 46.5 points below standard/increased 8.3 points (yellow) Math: 103.3 points below standard/declined 3.9 points (red)  2019 CA School Dashboard: 14.3% (declined 18.6% - orange) of socioeconomically disadvantaged graduated as prepared	Same as baseline.			95% CAASPP Participation - ELA & Math CAASPP: Due to suspension of the CA School Dashboard during COVID and use of an alternative testing measure (NWEA MAP) approved by the state of CA, the school will recalibrate CAASPP desired outcomes once spring 2022 CAASPP scores are received in the fall of 2022. 35.8% of socioeconomically disadvantaged will graduated as prepared
Foster Youth: CA School Dashboard State Indicator: ELA	Foster Youth 2019 DataQuest: 82% Participation Rate -	Same as baseline.			95% CAASPP Participation - ELA & Math CAASPP: The school will set desired outcome once baseline

and Math CAASPP Testing Scores DataQuest: School Dashboard Additional Reports and Data - CAASPP Participation Rates  CA School Dashboard State Indicator: College and Career Indicator	ELA 82% Participation Rate - Math  Foster Youth 2019 CA School Dashboard: ELA: N/A (less than 11 students) Math: N/A (less than 11 students)  2019 CA School Dashboard: College and Career Indicator: N/A (less than 11 students)				data is available. CA School Dashboard: The school will set desired outcome once baseline data is available.
Students With Disabilities: CA School Dashboard State Indicator: ELA and Math CAASPP Testing Scores DataQuest: School Dashboard Additional Reports and Data - CAASPP Participation Rates  CA School Dashboard State Indicator: College and Career Indicator	Students With Disabilities 2019 DataQuest: 71% Participation Rate - ELA 71% Participation Rate - Math  Students With Disabilities 2019 CA School Dashboard: ELA: 68 points below standard/increased 14.8 points (yellow) Math: 122.3 points below standard/declined 3.6 points (red)  2019 CA School Dashboard: College and Career Indicator: N/A (less than 11 students)	Same as baseline.			95% CAASPP Participation - ELA & Math CAASPP: Due to suspension of the CA School Dashboard during COVID and use of an alternative testing measure (NWEA MAP) approved by the state of CA, the school will recalibrate CAASPP desired outcomes once spring 2022 CAASPP scores are received in the fall of 2022. CA School Dashboard: College and Career Indicator: The school will set desired outcome once baseline data is available.
DataQuest: EL Data: Annual Reclassification Counts and Rates	2019-20: 19.6% reclassification rate	2020-21: 15.2% reclassification rate			18% reclassification rate
					100% of facilitators and 80% of

iLEAD Comprehensive Growth Card	<p>iLEAD Exploration Spring 2022 Participation Rates: 96% of iLEAD Exploration facilitators and K-2 learners (combined) 95% of Exploration facilitators and 3-12 learners (combined)</p> <p>iLEAD AV Spring 2022 Participation Rates: K-2 Facilitators: 100% 3-8 Facilitators: 99% K-2 Learners: 72.4% 3-8 Learners: 74.2%</p> <p>Fall 2021 Results: 61.5% of iLEAD Exploration and 54.8% of iLEAD AV learners achieved their academic ILP goal. 55.5% of iLEAD Exploration and 50.3% of iLEAD AV learners achieved their SEL ILP goal.</p>	Same as baseline.			<p>learners will complete the iLEAD Comprehensive Growth Card.</p> <p>65% of iLEAD Exploration and 60% of iLEAD AV learners achieved their academic ILP goal. 60% of iLEAD Exploration and 55% of iLEAD AV learners achieved their SEL ILP goal.</p>
Data Quest: Four-Year Adjusted Cohort Graduation Rate Report	<p>2019-20 DataQuest: 0% earned Golden State Seal Merit Diploma 0% earned Seal of Biliteracy 6.4% met UC/CSU requirements</p>	<p>2020-21 DataQuest: 47.7% earned Golden State Seal Merit Diploma 1.5% earned Seal of Biliteracy 15.2% met UC/CSU requirements</p>			<p>52% earned Golden State Seal Merit Diploma 4% earned Seal of Biliteracy 22% met UC/CSU requirements</p>

## Actions

Action #	Title	Description	Total Funds	Contributing
1	Student Achievement	School staff will support all learners in their mastery of standards through integrated core projects and/or curriculum as reflected on state assessments and other internal measures.	\$3,237,757.00	No

		School staff will work to increase the percentage of learners who participate in internal and state assessments (State Priority #4, WASC #1).		
2	College and Career Readiness (repeated expenditure, Goal 1, Action 3)	The school will ensure high school graduates are college and career ready based on the CCI indicator by offering AP and A-G classes, college credit courses, state seal of biliteracy, and CTE pathways in order to graduate prepared for college and career as indicated on the CA School Dashboard. Learners will receive counseling and support for college readiness (State Priority #4, WASC #2).	\$0.00	No
3	EL Learner Achievement (repeated expenditure, Goal 1, Action 2)	School staff will support EL learners in their mastery of standards through integrated core projects and/or curriculum as reflected on state assessments and other internal measures. Learners will receive counseling and support for college readiness so that they will graduate prepared as measured on the CA School Dashboard (State Priority #4, WASC #2).	\$0.00	Yes
4	Socioeconomically Disadvantaged Achievement (repeated expenditure, Goal 1, Action 2)	School staff will support socioeconomically disadvantaged learners in their mastery of standards through integrated core projects and/or curriculum as reflected on state assessments and other internal measures. Learners will receive counseling and support for college readiness so that they will graduate prepared as measured on the CA School Dashboard (State Priority #4, WASC #2).	\$0.00	Yes
5	Foster/Homeless Youth Achievement (repeated expenditure, Goal 1, Action 2)	School staff will support foster/homeless learners in their mastery of standards through integrated core projects and/or curriculum as reflected on state assessments and other internal measures. Learners will receive counseling and support for college readiness so that they will graduate prepared as measured on the CA School Dashboard (State Priority #4, WASC #2).	\$0.00	Yes
6	Students with Disabilities Achievement (repeated expenditure, Goal 1, Action 10)	School staff will support students with disabilities in their mastery of standards through integrated core projects and/or curriculum as reflected on state assessments and other internal measures. School staff will work to increase the percentage of learners who participate in internal and state assessments (State Priority #4, WASC #2).	\$0.00	No
7	EL Reclassification (repeated expenditure, Goal 1, Action 2)	The EL Coordinator and other school staff will utilize professional development principles in ELD and regularly analyze data to provide targeted support with a focus on increased English proficiency in reading, listening, speaking, and writing to ensure progress is being made towards reclassification (State Priority #4).	\$0.00	Yes
8	Individual Learning Plan (ILP) (repeated expenditure, Goal 1, Action 1)	Through a variety of strategies including professional development sessions, learner-led conferences and/or learning period meetings, school staff will work with learners to create goals and action plans to improve academic performance and social-emotional learning (SEL). Additionally, school staff will provide SEL strategies to support learners in achieving their personal goals (State Priority #8).	\$0.00	No
9	Other High School Outcomes (repeated expenditure, Goal 1, Action 1)	School staff will maximize opportunities for high schoolers to be recognized for achievements by earning the Golden State Seal Merit Diploma, the State Seal of Biliteracy, and/or the National Merit scholarship (State Priority #8, WASC Goal #2).	\$0.00	No

# Goal Analysis for 2021-2022

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

During the 2021-22 school year, learners were monitored for academic achievement and social-emotional well-being. There were no substantive differences in planned actions and the actual implementation of these actions under goal two.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

For this goal, there was no significant material difference between budgeted expenditures and estimated actual expenditures.

An explanation of how effective the specific actions were in making progress toward the goal.

During the 2021-22 school year, iLEAD Hybrid experienced its highest testing rate participation in the history of the school. The high school program hosted its second college fair and hosted webinars to support college and career readiness. High school counselors engaged with all high school learners. A virtual PBL class was piloted. Learner achievement continues to be monitored across student groups.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

For the 2022-23 school year, the planned goal remains the same. Upon careful analysis of the eight state priorities, the school strategically realigned its actions under each of the three goals so that the state priorities aligned with the goal. Goal two pertains to student outcomes, which includes Priority 4: Pupil Achievement and Priority 8: Other Pupil Outcomes. Any measures pertaining to student achievement elsewhere in the LCAP were placed under this goal. The school also ensured that all measurable outcomes required by the state were included in this year's LCAP. In the 2021-22 LCAP, there was a financial data entry error that caused all actions to repeat multiple times, so all actions were removed per LACOE's instructions and reentered so that the actions did not repeat themselves.

**A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.**

# Goal

Goal #	Description
3	Generate active engagement between parents, families, and the school as well as connections with the community, to promote learner achievement and communication among all educational partners.

## An explanation of why the LEA has developed this goal.

Upon consideration of educational partner feedback on the effects of the COVID-19 pandemic on the school's learners, this goal addresses the need for a strategic focus on learner well-being and family engagement in school activities. The charter school will continue to strengthen, support and expand opportunities for learners to understand how to succeed academically and social-emotionally, develop supportive relationships, foster a positive school culture, and increase school engagement. A renewed emphasis will also be placed on family involvement and parent education to increase learner and family connectedness in a safe, supportive, and stable learning environment.

This goal addresses the following State Priorities:

Priority 3: Parental Involvement (Engagement)

Priority 5: Pupil Engagement (Engagement)

Priority 6: School Climate (Engagement)

## Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023-2024
School Calendar	2020-21: The school holds a minimum of three parent meetings throughout the year.	2021-22: The school held a minimum of three parent meetings throughout the year.			The school held a minimum of three parent meetings throughout the year.
CA School Dashboard Local Indicator: Parent & Family Engagement	2019 CA School Dashboard Local Indicator: Parent & Family Engagement: Standard Met	2019 CA School Dashboard Local Indicator: Parent & Family Engagement: Standard Met			Parent & Family Engagement: Standard Met
CA School Dashboard State Indicator: Graduation Rate CALPADS 8.1b: Middle & High School Drop Out	2019 CA School Dashboard: 69.9% graduation rate (declined 16.2% - orange) 2019-20 CALPADS: High School Dropout	2019 CA School Dashboard: 69.9% graduation rate (declined 16.2% - orange) 2019-20 CALPADS: High School Dropout			75% graduation rate High School Dropout Rate: Maintain less than 1% Middle School Dropout Rate: Less than 1% # community partnerships: 40

Data Counselor Data	Rate: 0.17% Middle School Dropout Rate: 1.8% # community partnerships: 33	Rate: 0.17% Middle School Dropout Rate: 1.8% # community partnerships: 33			
EL Learners: CA School Dashboard State Indicator: Graduation Rate Counselor Data	EL Learners: 2019 CA School Dashboard: EL Graduation rate N/A EL learners and their families receive additional counseling, social emotional, and academic support/resources from school staff.	EL Learners: 2019 CA School Dashboard: EL Graduation rate N/A 2021-22: 100% of EL learners and their families received additional counseling, social emotional, and academic support/resources from school staff.			EL Learners: 2019 CA School Dashboard: EL Graduation Rate will be determined by the school once there is a baseline. 100% of EL learners and their families will receive additional counseling, social emotional, and academic support/resources from school staff.
Foster Youth: CA School Dashboard State Indicator: Graduation Rate Counselor Data	Foster Youth: 2019 CA School Dashboard: Graduation rate N/A Foster youth and their families received additional counseling, social emotional, and academic support/resources from school staff.	Foster Youth: 2019 CA School Dashboard: Graduation rate N/A 100% of foster youth and their families received additional counseling, social emotional, and academic support/resources from school staff.			Foster Youth: 2019 CA School Dashboard: Graduation rate to be determined based on baseline data. 100% of foster youth and their families will receive additional counseling, social emotional, and academic support/resources from school staff.
Socioeconomically Disadvantaged: CA School Dashboard State Indicator: Graduation Rate Counselor Data	Socioeconomically Disadvantaged: 2019 CA School Dashboard: 69% graduated (declined 10.4% - orange) Socioeconomically disadvantaged and their families receive additional counseling, social emotional, and academic support/resources from	Socioeconomically Disadvantaged: 2019 CA School Dashboard: 69% graduated (declined 10.4% - orange) 2021-22: 100% of socioeconomically disadvantaged and their families received additional counseling, social emotional, and academic			Socioeconomically Disadvantaged: CA School Dashboard: 75% graduated 100% of socioeconomically disadvantaged and their families will receive additional counseling, social emotional, and academic support/resources from school staff.

	school staff.	support/resources from school staff.			
CA School Dashboard State Indicator: Chronic Absenteeism CALPADS Report 14.1: Attendance Rate	2019 CA School Dashboard: 0.9% chronic absenteeism rate (maintained 0.3%) 2020-21 Attendance Rate: 100% of learners were absent ten or less days.	2019 CA School Dashboard: 0.9% chronic absenteeism rate (maintained 0.3%) 2020-21 Attendance Rate: 100% of learners were absent ten or less days.			CA School Dashboard: Maintain less than 1% chronic absenteeism Attendance Rate: Maintain 98% or more of learners were absent ten or less days.
CA School Dashboard State Indicator: Suspension Rate DataQuest: Expulsion Rate CA School Dashboard Local Indicator: Local Climate Survey	2019 CA School Dashboard: 0.8% suspended at least once (maintained - blue) 2020-21 Expulsion Rate: 0% CA School Dashboard Local Indicator: Local Climate Survey: Standard Met	2019 CA School Dashboard: 0.8% suspended at least once (maintained - blue) 2020-21 Expulsion Rate: 0% CA School Dashboard Local Indicator: Local Climate Survey: Standard Met			Maintain less than 1% suspension rate. Expulsion Rate: 0% Local Climate Survey: Standard Met
Panorama Learner Survey Data	2022 Panorama Learner Survey: 90% positive School-Teacher Relationships	2022 Panorama Learner Survey: 90% positive School-Teacher Relationships			92% positive School-Teacher Relationships

## Actions

Action #	Title	Description	Total Funds	Contributing
1	Educational Partners	To solicit feedback and provide program updates, school staff will facilitate educational partner events or meetings and conduct an annual survey for input on the school and its programs (State Priority #3).	\$47,218.00	No
2	Family Education	School staff will provide ongoing educational opportunities such as the annual SPED symposium and Parent University webinars for families in order to promote engagement (State Priority #3).	\$300,000.00	No
3	Academic Counseling and Support	School staff will provide academic counseling and resources to promote a high, four-year graduation rate while also lowering the school's dropout rate of high school and middle school learners. The school will also increase the number of community partnerships to support learners and their families (State Priority #5, WASC Goal #2).	\$200,000.00	No



4	EL Academic Counseling and Support	The EL Coordinator and other school staff will provide academic counseling and resources to a high, four-year graduation rate while also lowering the school's dropout rate of its EL high school and middle school learners (State Priority #5, WASC Goal #2).	\$800,000.00	Yes
5	Homeless and Foster Youth Academic Counseling and Support (repeated expenditure, Goal 3, Action 4)	School staff will provide academic counseling and resources to promote a high, four-year graduation rate while also lowering the school's dropout rate of its homeless and foster youth high school and middle school learners (State Priority #5, WASC Goal #2).	\$0.00	Yes
6	Socioeconomically Disadvantaged Academic Counseling and Support (repeated expenditure, Goal 3, Action 4)	School staff will provide academic counseling and resources to promote a high, four-year graduation rate while also lowering the school's dropout rate of its socioeconomically disadvantaged high school and middle school learners (State Priority #5, WASC Goal #2).	\$0.00	Yes
7	School Attendance:	School staff will provide extra support for learners exhibiting challenges with academics and SEL to minimize chronic absenteeism and support a strong attendance rate (State Priority #5).	\$784,585.00	No
8	School Climate (repeated expenditure, Goal 3, Action 7)	iLEAD's staff will personalize learning and develop relationships through the core program to ensure that learners have a safe and nurturing environment while at school. School staff will incorporate strategies from Love & Logic, Restorative Practices, and/or 7 Habits to help maintain safety and a positive school climate, ensuring accountability while reducing the number of suspensions (State Priority #6).	\$0.00	No
9	Learner Engagement	The school will host academic (such as learner-led conferences or showcases of learning), family and community events for learners to share their artistic and academic endeavors with peers, parents and the community (State Priority #6).	\$24,464.00	No

## Goal Analysis for 2021-2022

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Goal three's emphasis is on community, family and learner engagement. There were no substantive differences in planned actions and the actual implementation of these actions under goal three.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

For this goal, there was no significant material difference between budgeted expenditures and estimated actual expenditures.

An explanation of how effective the specific actions were in making progress toward the goal.

iLEAD Hybrid provides many engaging events and activities resulting in low chronic absenteeism, suspension and expulsion rates. Among the activities are webinars, learner-led clubs, Parent Universities, a SPED Symposium, and end of the year celebrations. School leadership engages with families to receive feedback on the

program. Inadequate progress monitoring is effective and thorough.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

For the 2022-23 school year, the planned goal remains the same. Upon careful analysis of the eight state priorities, the school strategically realigned its actions under each of the three goals so that the state priorities aligned with the goal. Goal three pertains to engagement, which includes Priority 3: Parental Involvement, Priority 5: Pupil Engagement, and Priority 6: School Climate. Actions and measures pertaining to high school graduation rates were moved to this goal. The school also ensured that all measurable outcomes required by the state were included in this year's LCAP. In the 2021-22 LCAP, there was a financial data entry error that caused all actions to repeat multiple times, so all actions were removed per LACOE's instructions and reentered so that the actions did not repeat themselves.

**A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.**

# Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students for 2022-2023

Projected LCFF Supplemental and/or Concentration Grants	Projected Additional LCFF Concentration Grant (15 percent)
\$2,661,788.00	

## Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
7.33%	0.00%	\$0.00	7.33%

**The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.**

## Required Descriptions

For each action being provided to an entire school, or across the entire school district or county office of education (COE), an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

When developing each action for iLEAD Hybrid, it was important to first consider the needs of foster youth, English learners, and socioeconomically disadvantaged learners (including those experiencing homelessness) in order to develop a plan on how to increase and improve services to these learners during the 2022-23 school year. School staff can reduce barriers and increase equity and access through evidence-based, trauma-sensitive supports and practices that provide opportunities for success. In order to address achievement gaps in ELA and math, and to help these learners in their academic and SEL achievement (to include college and career), the school plans to implement several actions to target these learners directly, with the goal of increasing their engagement in learning, improving academic support and student achievement, removing barriers to education, addressing social-emotional needs, and promoting school-family connections/partnerships.

More specifically, the unique needs of foster youth include additional academic support/interventions, community resources, counseling support, trauma-sensitive instruction, social-emotional support, individualized learning plans, equity and inclusion, and parent/family assistance. The unique needs of EL learners include English language development, additional academic support/interventions, difficulty accessing curriculum due to language barriers, primary language support, literacy skill building, language acquisition monitoring, community resources, equity and inclusion, social-emotional support, individualized learning plans, family translation services, and parent/family assistance. The unique needs of socioeconomically disadvantaged include additional academic support/interventions, community resources, counseling support, funding to access AP exams, college credit courses, trauma-sensitive instruction, social-emotional support, individualized learning plans, equity and inclusion, and parent/family assistance.

Due to the COVID-19 pandemic, state metrics were suspended for two years on the CA School Dashboard which means no current 2020 or 2021 data (aside from local priorities) was available. Thus, the 2019 Dashboard data included in the LCAP is a baseline, and updated data will be provided to the charter school during the 2022-23 school year (to include state testing results, as the school's learners resumed state testing in the spring of 2022). When compared to all students and the state, the 2019 CA School Dashboard shows the following (note: foster youth did not have a significant population of 11 or more students to provide Dashboard data):

ELA: In the “All Students” category, iLEAD Hybrid learners were 15.1 points below standard overall (the state was 2.5 points below standard), yet iLEAD Hybrid’s English learners were 41.4 points below standard, and socioeconomically disadvantaged were 46.5 points below standard.

Math: In the “All Students” category, iLEAD Hybrid learners were 68.9 points below standard overall (the state was 33.5 points below standard), yet iLEAD Hybrid’s English learners were 87.2 points below standard, and socioeconomically disadvantaged were 103.3 points below standard.

College/Career: 25.8% of all iLEAD Hybrid learners graduated as prepared (compared to 44.1% of all students in the state), yet 14.3% of iLEAD Hybrid’s socioeconomically disadvantaged graduated as prepared (there were not enough EL learners graduating that year to track progress in this area).

Graduation Rate: 69.9% of all iLEAD Hybrid learners graduated (compared to 85.8% of all students in the state), yet 69% of iLEAD Hybrid’s socioeconomically disadvantaged graduated as prepared (there were not enough EL learners graduating that year to track progress in this area).

Chronic Absenteeism: 0.9% of all iLEAD Hybrid learners were chronically absent (compared to 10.1% of all students in the state), yet 1.3% of iLEAD Hybrid’s English learners and 2.1% of socioeconomically disadvantaged were chronically absent.

When creating actions, the school also evaluated NWEA MAP benchmark results, SEL data, counselor/liaison feedback, attendance, and SST information. Additionally, feedback from counselors, facilitators, liaisons, families, learners, office staff, community partners, board members and/or EL collaborations was considered. Through family meetings, discussions at school events, and school surveys, educational partner feedback regarding curriculum/instruction, safety, school culture, and diversity, equity and inclusion (DEI) were also considered to develop a well-rounded plan that ensured the needs of all learners were being met.

In goal one, the school created an action to provide professional learning to include diversity, equity and inclusion. These trainings are principally directed towards identifying any specific needs of unduplicated learners, referring them for additional support as needed (which also ties into the actions in goals two and three) and addressing any discrepancies in diversity, equity and inclusion in the classroom as it relates to curriculum and instruction. School staff will be able to better identify, support and implement practices/resources that increase services to these unduplicated groups.

In goal two, the school plans to monitor these identified student groups both academically and social-emotionally in order to provide additional, targeted support to promote learner achievement and college and career readiness. The school will increase counseling, monitoring and support to ensure unduplicated are utilizing opportunities to take AP classes, A-G classes, college credit courses, earn the state seal of biliteracy, and/or enroll in CTE pathways in order to graduate prepared as indicated on the CA School Dashboard.

In goal three, ongoing family education and additional resources (through counseling support, community partnerships and/or additional resources based on individual need) will be dedicated to support these learners through the guidance of school counselors, liaisons and coordinators. Families of unduplicated learners are often less connected to school and sometimes need additional support on how to support their learners in the home typically resulting in higher rates of chronic absenteeism and lower graduation rates.

A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.

During the 2022-23 school year, the school plans to use supplemental grant funds received under the Local Control Funding Formula to increase and improve the services of these special populations of students as follows:

#### Foster Youth

- Increased direct educational support through evidenced-based instructional strategies provided through professional learning to effectively address educational barriers and unique challenges.
- Targeted academic support through intervention opportunities in order to accelerate learning and address academic achievement gaps in English and math.
- Direct support services from liaisons and coordinators to provide community resources in order to meet each learner’s social-emotional and physical needs.
- Supplemental support and strategies from school counselors to meet academic, social-emotional and physical needs.
- Additional progress monitoring and/or visitations by school staff as needed to ensure progress in school and support positive family-school relationships.
- Support for families through ongoing family education and other planned events to support parents/guardians.

#### English Learners

- Increased direct educational support through evidenced-based instructional strategies provided through professional learning to effectively address educational/language barriers and other unique challenges.
- Targeted academic support through intervention opportunities in order to accelerate learning and address academic achievement gaps in English and math.
- Individualized translation services as needed for families to effectively communicate with school staff.
- Additional language support from ELD facilitators and the EL coordinator.
- Additional support and guidance for Integrated and Designated ELD and ELPAC testing through the use of Ellevation, Brian Pop ELL, and small group instruction.
- Supplemental language development programs and resources to increase literacy and build English proficiency.
- Direct support services from liaisons and coordinators to provide community resources in order to meet each learner's social-emotional and physical needs.
- Supplemental support and strategies from school counselors to meet academic, social-emotional and physical needs.
- Additional progress monitoring and/or visitations by school staff as needed to ensure progress in school and support positive family-school relationships.
- Support for families through ongoing family education and other planned events to support parents/guardians.
- Additional family resources and connections through the EL Quarterly newsletter.

#### Socioeconomically Disadvantaged

- Increased direct educational support through evidenced-based instructional strategies provided through professional learning to effectively address educational barriers and unique challenges.
- Targeted academic support through intervention opportunities in order to accelerate learning and address academic achievement gaps in English and math.
- Direct support services from liaisons and coordinators to provide community resources in order to meet each learner's social-emotional and physical needs.
- Supplemental support and strategies from school counselors to meet academic, social-emotional and physical needs.
- Additional progress monitoring and/or visitations by school staff as needed to ensure progress in school and support positive family-school relationships.
- Support for families through ongoing family education and other planned events to support parents/guardians.
- Supplemental funding for AP exam fees as needed.

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

Not applicable.

<b>Staff-to-student ratios by type of school and concentration of unduplicated students</b>	<b>Schools with a student concentration of 55 percent or less</b>	<b>Schools with a student concentration of greater than 55 percent</b>
Staff-to-student ratio of classified staff providing direct services to students	201:1	
Staff-to-student ratio of certificated staff providing direct services to students	23:1	

# Action Tables

## 2022-2023 Total Planned Expenditures Table

Totals:	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	\$37,935,374.00				\$37,935,374.00	\$18,193,429.00	\$19,741,945.00

Goal #	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
1	1	Fully Credentialed and Appropriately Assigned Staff	All	\$16,509,741.00				\$16,509,741.00
1	2	High Needs Support Team	Low Income, Foster Youth, English learner (EL)	\$1,683,688.00				\$1,683,688.00
1	3	Access to Standards-Aligned Instructional Materials	All	\$9,230,472.00				\$9,230,472.00
1	4	School Facilities	All	\$575,712.00				\$575,712.00
1	5	Curriculum Offerings and Implementation of State Standards (repeated expenditure, Goal 1, Action 3)	All					\$0.00
1	6	ELD Implementation of State Standards	English learner (EL)	\$178,100.00				\$178,100.00
1	7	Professional Learning	All	\$1,549,875.00				\$1,549,875.00
1	8	Staff Recruitment and Retention	All	\$21,269.00				\$21,269.00
1	9	High School Course Access (repeated expenditure, Goal 1, Action 3)	All					\$0.00
1	10	Multi-Tiered Systems of Support	All	\$2,792,493.00				\$2,792,493.00
2	1	Student Achievement	All	\$3,237,757.00				\$3,237,757.00
2	2	College and Career	All					\$0.00

		Readiness (repeated expenditure, Goal 1, Action 3)						
2	3	EL Learner Achievement (repeated expenditure, Goal 1, Action 2)	English learner (EL)					\$0.00
2	4	Socioeconomically Disadvantaged Achievement (repeated expenditure, Goal 1, Action 2)	Low Income					\$0.00
2	5	Foster/Homeless Youth Achievement (repeated expenditure, Goal 1, Action 2)	Foster Youth					\$0.00
2	6	Students with Disabilities Achievement (repeated expenditure, Goal 1, Action 10)	Student with Disabilities (SWD)					\$0.00
2	7	EL Reclassification (repeated expenditure, Goal 1, Action 2)	English learner (EL)					\$0.00
2	8	Individual Learning Plan (ILP) (repeated expenditure, Goal 1, Action 1)	All					\$0.00
2	9	Other High School Outcomes (repeated expenditure, Goal 1, Action 1)	All					\$0.00
3	1	Educational Partners	All	\$47,218.00				\$47,218.00
3	2	Family Education	All	\$300,000.00				\$300,000.00
3	3	Academic Counseling and Support	All	\$200,000.00				\$200,000.00
3	4	EL Academic Counseling and Support	English learner (EL)	\$800,000.00				\$800,000.00
3	5	Homeless and Foster Youth Academic Counseling and Support (repeated expenditure, Goal 3, Action	Foster Youth					\$0.00

		4)						
3	6	Socioeconomically Disadvantaged Academic Counseling and Support (repeated expenditure, Goal 3, Action 4)	Low Income					\$0.00
3	7	School Attendance:	All	\$784,585.00				\$784,585.00
3	8	School Climate (repeated expenditure, Goal 3, Action 7)	All					\$0.00
3	9	Learner Engagement	All	\$24,464.00				\$24,464.00



## 2022-2023 Contributing Actions Table

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover – Percentage (Percentage from prior year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4.Total Planned Contributing Expenditures (LCFF Funds)	5.Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)	Totals by Type	Total LCFF Funds
\$36,315,948.00	\$2,661,788.00	7.33%	0.00% - No Carryover	7.33%	\$2,661,788.00	0.00%	7.33%	<b>Total:</b>	\$2,661,788.00
								<b>LEA-wide Total:</b>	\$2,661,788.00
								<b>Limited Total:</b>	
								<b>Schoolwide Total:</b>	

Goal #	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions(LCFF Funds)	Planned Percentage of Improved Services (%)
1	2	High Needs Support Team	Yes	LEA-wide	Low Income, Foster Youth, English learner (EL)	All Schools	\$1,683,688.00	
1	6	ELD Implementation of State Standards	Yes	LEA-wide	English learner (EL)	All Schools	\$178,100.00	
2	3	EL Learner Achievement (repeated expenditure, Goal 1, Action 2)	Yes	LEA-wide	English learner (EL)	All Schools		
2	4	Socioeconomically Disadvantaged Achievement (repeated expenditure, Goal 1, Action 2)	Yes	LEA-wide	Low Income	All Schools		
2	5	Foster/Homeless Youth Achievement (repeated expenditure, Goal 1, Action 2)	Yes	LEA-wide	Foster Youth	All Schools		
2	7	EL Reclassification (repeated expenditure, Goal 1, Action 2)	Yes	LEA-wide	English learner (EL)	All Schools		
3	4	EL Academic Counseling and Support	Yes	LEA-wide	English learner (EL)	All Schools	\$800,000.00	
3	5	Homeless and Foster Youth Academic Counseling and Support (repeated expenditure, Goal 3, Action 4)	Yes	LEA-wide	Foster Youth	All Schools		
3	6	Socioeconomically Disadvantaged Academic Counseling and Support (repeated expenditure, Goal 3, Action 4)	Yes	LEA-wide	Low Income	All Schools		

# 2021-2022 Annual Update Table

Totals:	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Actual Expenditures (Total Funds)
Totals:	\$35,087,343.00	\$34,194,839.00

Last Year's Goal#	Last Year's Action#	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	1	Scope & Sequence (1000,2000,3000 non contrib)	No	\$20,019,515.00	\$15,297,541.00
1	2	Teacher Credentials (1120) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
1	3	Grade Level Resources (4100s)	No	\$141,008.00	\$141,008.00
1	4	Facilities (4325)	No	\$9,000.00	\$9,209.00
1	5	PD: SLOs (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
1	6	PD: Instruction (1310) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
1	7	Academic Achievement: EL (1000,3000s) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
1	8	Academic Achievement: Foster Youth & Homeless (1000s, 3000s contrib) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
1	9	Academic Achievement: Low Income Learners (1000 3000) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
1	10	Professional Development: DEI (1000s) (repeated expenditure, Goal 1, Action	No	\$0.00	\$0.00

		1)			
1	11	PD: Suicide Prevention (1310) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
1	12	Scope and Sequence ( 1.1 1000-3000 contrib)	Yes	\$1,743,696.00	\$1,743,696.00
1	13	Scope and Sequence ( 1.1 iCA ed supp non contrib 5801)	No	\$894,318.00	\$1,111,435.00
1	14	Scope and Sequence (1.1 5801 iCA supp contrib)	Yes	\$723,417.00	\$725,547.00
1	15	Scope and Sequence (1.1 5852 ica student support)	No	\$3,093,131.00	\$3,708,716.00
1	16	Teacher Credentials (1.2 5807 BTSA cred)	No	\$4,600.00	\$4,600.00
1	17	Grade Level Resources (1.3 4335 )	No	\$6,022,020.00	\$8,605,129.00
1	18	Grade Level Resources 1.3 (4400s)	No	\$400,000.00	\$400,000.00
1	19	Grade Level Resources 1.3 (5200s PD)	No	\$104,769.00	\$149,784.00
1	20	Grade Level resources ( 1.3 5801 iCA shared serv Ed supp)	No	\$483,749.00	\$483,749.00
1	21	Grade Level resources ( 1.3 5801 ica shared serv Makers)	No	\$410,568.00	\$410,568.00
1	22	Grade level resources (1.3 5801 iCA shared serv. contrib) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
1	23	Facilities (1.4 4330 Healthand Safety)	No	\$14,659.00	\$16,721.00
1	24	Facilities ( 1.4 5500s Utilities)	No	\$38,576.00	\$52,512.00
1	25	Facilities ( 1.4 5600s rent...)	No	\$338,032.00	\$577,633.00
1	26	Facilities (1.4 5801 iCA shared serv educ tech supp)	No	\$266,080.00	\$307,973.00
1	27	Facilities (1.4 5801 iCA shared serv Facilities support)	No	\$112,489.00	\$102,007.00

1	28	Pd: Instruction (1.6 1910) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
1	29	PD: Instruction (1.6 5200) (repeated expenditure, Goal 1, Action 3)	No	\$0.00	\$0.00
1	30	PD: Instruction ( 1.6 5801 ica acad coach) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
1	31	Academic Achievement EL (1.7 2120 3000 classified ) (repeated expenditure, Goal 0, Action 1)	Yes	\$0.00	\$0.00
1	32	Academic Achievement EL (1.7 5200 5801 PD DEI , mtss, EL strat) (repeated expenditure, Goal 1, Action 3)	Yes	\$0.00	\$0.00
1	33	Academic Achievement EL (1.7 Cred couns 5852) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
1	34	Academic Achievement EL (1.7 1900,3000 extra duty assig) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
1	35	Academic Achievement EL (1.7 5600 curric libr rent)	Yes	\$50,000.00	\$100,000.00
1	36	Academic Achievement EL (1.7 4400 5840 technology learn platforms)	Yes	\$41,600.00	\$91,600.00
1	37	Academic achievement EL (1.7 4100) (repeated expenditure, Goal 1, Action 3)	Yes	\$0.00	\$0.00
1	38	Academic Achievement EL (1.7 5801 iCA contr serv EL) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
1	39	Academic Achievement EL (1.7 1120, 3000) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00

1	40	Academic Achievement EL (1.7 5801 ica cont serv acad coach) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
1	41	Academic Achievement Homeless and Foster Youth (1.8 2120,3000) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
1	42	Academic Achievement Homeless and Foster Youth (1.8 5200, 5801 PD, DEI, MTSS) (repeated expenditure, Goal 1, Action 3)	No	\$0.00	\$0.00
1	43	Academic Achievement Homeless and Foster Youth (1.8 5852 couns staff) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
1	44	Academic Achievement Homeless and Foster Youth (1.8 1900,3000 extra duty assgn) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
1	45	Academic Achievement Homeless and Foster Youth (1.8 5600 curriculum lib) (repeated expenditure, Goal 1, Action 7)	Yes	\$0.00	\$0.00
1	46	Academic Achievement Homeless and Foster Youth (1.8 4400, 5840 tech learning platforms) (repeated expenditure, Goal 1, Action 7)	Yes	\$0.00	\$0.00
1	47	Academic Achievement Homeless and Foster Youth (1.8 4100 bridges) (repeated expenditure, Goal 1, Action 3)	Yes	\$0.00	\$0.00
1	48	Academic Achievement Homeless and Foster Youth (1.8 5801 ica contract services educ support	Yes	\$0.00	\$0.00

		maker) (repeated expenditure, Goal 1, Action 1)			
1	49	Academic Achievement Homeless and Foster Youth (1.8 1120 3000 EL coord) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
1	50	Academic Achievement: Low Income Learners (1.9 1120 2120 3000) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
1	51	Academic Achievement: low income learners (1.9 5200 5801 PD DEI, MTSS, EL) (repeated expenditure, Goal 1, Action 3)	Yes	\$0.00	\$0.00
1	52	Academic Achievement: Low income (1.9 5852 cred couns) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
1	53	Academic Achievement: low income (1.9 1900 3000 Extra duty assign) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
1	54	Academic Achievement: Low Income (1.9 5600 curr lib rent) (repeated expenditure, Goal 1, Action 7)	Yes	\$0.00	\$0.00
1	55	academic achievement : Low income (1.9 Tech learning platf 4400 5840) (repeated expenditure, Goal 1, Action 7)	Yes	\$0.00	\$0.00
1	56	academic achievement : low income (1.9 bridges 4100) (repeated expenditure, Goal 1, Action 3)	Yes	\$0.00	\$0.00
1	57	academic achievement: low income (1.9 5801 iCA contr servs) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00

1	58	academic achievement : low income (1.9 EL coord 1120 3000) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
1	59	Professional Development DEI (1.10 2120 2120 classrm care team) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
1	60	Professional development DEI (1.10 1310) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
1	61	Professional development DEI (1.10 1910) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
1	62	Professional development DEI (1.10 5801 ica educ support MTSS) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	1	Academic Performance (1000s) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	2	Schoolwide Learning Outcomes (1000s) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	3	Studio Presentations of Learning (5801 ica maker team) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	4	SEL: EL Learners (1000s) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	5	SEL: Foster & Homeless Youth (1000s) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	6	SEL: Low Income Learners (1000s) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	7	Assessments: Participation	No	\$0.00	\$0.00



		(1000s) (repeated expenditure, Goal 1, Action 1)			
2	8	SST (5801 iCA MTSS coaching) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	9	High School: CCI (1310) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	10	High School: CTE (1310) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	11	SEL (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	12	Academic Performance (2.1 4317)	Yes	\$11,038.00	\$11,038.00
2	13	Academic Performance (5801) 2.1 (repeated expenditure, Goal 1, Action 3)	No	\$0.00	\$0.00
2	14	Schoolwide Learning Outcomes (2.2 4317) (repeated expenditure, Goal 2, Action 1)	No	\$0.00	\$0.00
2	15	Schoolwide Learning Outcomes (2.2 5801) (repeated expenditure, Goal 1, Action 3)	No	\$0.00	\$0.00
2	16	studio Presentation of Learning (2.3 5801) (repeated expenditure, Goal 1, Action 3)	No	\$0.00	\$0.00
2	17	SEL: EL Learners (2.4 5801) (repeated expenditure, Goal 1, Action 3)	Yes	\$0.00	\$0.00
2	18	SEL Foster and Homeless Youth (2.5 5801) (repeated expenditure, Goal 1, Action 3)	Yes	\$0.00	\$0.00
2	19	SEL: Low income learners (2.6 5801) (repeated expenditure, Goal 1, Action 3)	Yes	\$0.00	\$0.00
2	20	Assessments: Participation	No	\$0.00	\$0.00

		(2.7. 4100s, 4335, 4430, 5200s, 5801, 5801) (repeated expenditure, Goal 1, Action 3)			
2	21	SEL (2.8 5801) (repeated expenditure, Goal 1, Action 3)	No	\$0.00	\$0.00
2	22	High School: CCI (2.9 5801) (repeated expenditure, Goal 1, Action 3)	No	\$0.00	\$0.00
2	23	High School: CTE (2.10 5801) (repeated expenditure, Goal 1, Action 3)	No	\$0.00	\$0.00
2	24	SEL (2.11 5801) (repeated expenditure, Goal 1, Action 3)	No	\$0.00	\$0.00
2	25	Academic Performance (2.1 1310) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	26	Academic Performance (2.1 5801 ica educ supp and makers) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	27	Schoolwide Learning Outcomes (2.2 1310) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	28	Schoolwide Learning outcomes (2.2 4317) (repeated expenditure, Goal 2, Action 1)	Yes	\$0.00	\$0.00
2	29	Schoolwide Learning Outcomes (2.2 5801 ica educ support makers) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	30	Studio presentations of learning (2.3 1000s) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	31	studio presentations of learning (2.3 1310) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00

2	32	SEL EL learners (2.4 1310) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	33	SEL: EI Learners (2.4 5852 credent.couns) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	34	SEL: EL Learners (2.4 5852 iCA cred couns) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	35	SEL: Foster Youth and Homeless (2.5 1310) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	36	SEL: Foster and Homeless Youth (2.5 5801 cred couns) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	37	SEL: Low Income learners (2.6 1310 ed spec) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	38	SEL: Low Income Learners (2.6 5801 cred couns sped) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	39	Assessments: participation (2.7 4100s) (repeated expenditure, Goal 1, Action 3)	No	\$0.00	\$0.00
2	40	Assessments: participation (2.7 4335 ed matrsls) (repeated expenditure, Goal 1, Action 3)	No	\$0.00	\$0.00
2	41	Assessment: participation (2.7 4330 stu tech) (repeated expenditure, Goal 1, Action 3)	No	\$0.00	\$0.00
2	42	Assessment : Participation (2.7 5200s) (repeated expenditure, Goal 1, Action 3)	No	\$0.00	\$0.00
2	43	Assessment: Participation (2.7 5801 iCA shared serv educ supp) (repeated	No	\$0.00	\$0.00

		expenditure, Goal 1, Action 1)			
2	44	Assessment: participation (2.7 5801 iCA Makers) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	45	SST (2.8 1120 SST coord) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	46	High School: CCI (2.9 5852 cred couns) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	47	High school: CTE (2.10 5852 cred couns) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	48	Academic Performance (2.1 1310) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
3	1	School Communication (4345 printing sup)	No	\$6,287.00	\$7,887.00
3	2	School Events (2110) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
3	3	Stakeholder Meetings (1310) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
3	4	Resource Support: EL Learners (2120 2120 3000) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
3	5	Resource Support: Foster Youth & Homeless (2120 2120 3000) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
3	6	Resource Support: Low Income Learners (2120 2120 3000) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
3	7	Student Engagement (2120 2120 3000) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00

3	8	Graduation Rate (5852 cred couns) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
3	9	School Communication (3.1 5850 stu info system platform)	No	\$158,791.00	\$136,486.00
3	10	School Events (3.2 1000s) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00

## 2021-2022 Contributing Actions Annual Update Table

6.Estimated Actual LCFF Supplemental and/or Concentration Grants (Input Dollar Amount):	4.Total Planned Contributing Expenditures (LCFF Funds)	7.Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)	5.Total Planned Percentage of Improved Services (%)	8.Total Estimated Actual Percentage of Improved Services(%)	Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)
\$2,331,321.00	\$2,569,751.00	\$2,331,321.00	\$238,430.00	0.00%	0.00%	0.00% - No Difference

Last Year's Goal#	Last Year's Action#	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions(Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services(Input Percentage)
1	7	Academic Achievement: EL (1000,3000s) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	8	Academic Achievement: Foster Youth & Homeless (1000s, 3000s contrib) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	9	Academic Achievement: Low Income Learners (1000 3000) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	12	Scope and Sequence ( 1.1 1000-3000 contrib)	Yes	\$1,743,696.00	\$1,405,266.00	0.00%	0.00%
1	14	Scope and Sequence (1.1 5801 iCA supp contrib)	Yes	\$723,417.00	\$723,417.00	0.00%	0.00%
1	22	Grade level resources (1.3 5801 iCA shared serv. contrib) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%

1	31	Academic Achievement EL (1.7 2120 3000 classified ) (repeated expenditure, Goal 0, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	32	Academic Achievement EL (1.7 5200 5801 PD DEI , mtss, EL strat) (repeated expenditure, Goal 1, Action 3)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	33	Academic Achievement EL (1.7 Cred couns 5852) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	34	Academic Achievement EL (1.7 1900,3000 extra duty assig) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	35	Academic Achievement EL (1.7 5600 curric libr rent)	Yes	\$50,000.00	\$100,000.00	0.00%	0.00%
1	36	Academic Achievement EL (1.7 4400 5840 technology learn platforms)	Yes	\$41,600.00	\$91,600.00	0.00%	0.00%
1	37	Academic achievement EL (1.7 4100) (repeated expenditure, Goal 1, Action 3)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	38	Academic Achievement EL (1.7 5801 iCA contr serv EL) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	39	Academic Achievement EL (1.7 1120, 3000) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	40	Academic Achievement EL (1.7 5801 ica cont serv acad coach) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	41	Academic Achievement Homeless and Foster Youth (1.8 2120,3000) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	43	Academic Achievement Homeless and Foster Youth (1.8 5852 couns staff) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%

1	44	Academic Achievement Homeless and Foster Youth (1.8 1900,3000 extra duty assgn) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	45	Academic Achievement Homeless and Foster Youth (1.8 5600 curriculum lib) (repeated expenditure, Goal 1, Action 7)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	46	Academic Achievement Homeless and Foster Youth (1.8 4400, 5840 tech learning platforms) (repeated expenditure, Goal 1, Action 7)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	47	Academic Achievement Homeless and Foster Youth (1.8 4100 bridges) (repeated expenditure, Goal 1, Action 3)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	48	Academic Achievement Homeless and Foster Youth (1.8 5801 ica contract services educ support maker) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	49	Academic Achievement Homeless and Foster Youth (1.8 1120 3000 EL coord) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	50	Academic Achievement: Low Income Learners (1.9 1120 2120 3000) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	51	Academic Achievement: low income learners (1.9 5200 5801 PD DEI, MTSS, EL) (repeated expenditure, Goal 1, Action 3)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	52	Academic Achievement: Low income (1.9 5852 cred couns) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%



1	53	Academic Achievement: low income (1.9 1900 3000 Extra duty assign) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	54	Academic Achievement: Low Income (1.9 5600 curr lib rent) (repeated expenditure, Goal 1, Action 7)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	55	academic achievement : Low income (1.9 Tech learning platf 4400 5840) (repeated expenditure, Goal 1, Action 7)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	56	academic achievement : low income (1.9 bridges 4100) (repeated expenditure, Goal 1, Action 3)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	57	academic achievement: low income (1.9 5801 iCA contr servs) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	58	academic achievement : low income (1.9 EL coord 1120 3000) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	59	Professional Development DEI (1.10 2120 2120 classrm care team) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	12	Academic Performance (2.1 4317)	Yes	\$11,038.00	\$11,038.00	0.00%	0.00%
2	17	SEL: EL Learners (2.4 5801) (repeated expenditure, Goal 1, Action 3)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	18	SEL Foster and Homeless Youth (2.5 5801) (repeated expenditure, Goal 1, Action 3)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	19	SEL: Low income learners (2.6 5801) (repeated expenditure, Goal 1, Action 3)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	28	Schoolwide Learning outcomes (2.2 4317) (repeated expenditure, Goal 2, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%

3	4	Resource Support: EL Learners (2120 2120 3000) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
3	5	Resource Support: Foster Youth & Homeless (2120 2120 3000) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
3	6	Resource Support: Low Income Learners (2120 2120 3000) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
3	7	Student Engagement (2120 2120 3000) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%

## 2021-2022 LCFF Carryover Table

9.Estimated Actual LCFF Base Grant (Input Dollar Amount)	6. Estimated Actual LCFF Supplemental and/or Concentration Grants	LCFF Carryover – Percentage (Percentage from prior year)	10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	8.Total Estimated Actual Percentage of Improved Services(%)	11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	12. LCFF Carryover – Dollar Amount (Subtract 11 from 10 and multiply by 9)	13. LCFF Carryover – Percentage (12 divided by 9)
\$33,092,327.00	\$2,331,321.00	0.00%	7.04%	\$2,331,321.00	0.00%	7.04%	\$0.00 - No Carryover	0.00% - No Carryover

# Instructions

[Plan Summary](#)

[Engaging Educational Partners](#)

[Goals and Actions](#)

[Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students](#)

*For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at [lcff@cde.ca.gov](mailto:lcff@cde.ca.gov).*

## Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning (California *Education Code* [EC] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.
- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (EC Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.
- **Accountability and Compliance:** The LCAP serves an important accountability function because aspects of the LCAP template require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:
  - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (EC Section 52064[b][4-6]).

- Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (*EC* sections 52064[b][1] and [2]).
- Annually reviewing and updating the LCAP to reflect progress toward the goals (*EC* Section 52064[b][7]).

The LCAP template, like each LEA's final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which should: (a) reflect comprehensive strategic planning (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in *EC* sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity's budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2021–22, 2022–23, and 2023–24 school years reflects statutory changes made through Assembly Bill 1840 (Committee on Budget), Chapter 243, Statutes of 2018. These statutory changes enhance transparency regarding expenditures on actions included in the LCAP, including actions that contribute to meeting the requirement to increase or improve services for foster youth, English learners, and low-income students, and to streamline the information presented within the LCAP to make adopted LCAPs more accessible for educational partners and the public.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA's diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

Given present performance across the state priorities and on indicators in the California School Dashboard (Dashboard), how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions that the LEA believes, based on input gathered from educational partners, research, and experience, will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP, but may include information about effective practices when developing the LCAP and completing the LCAP itself. Additionally, information is included at the beginning of each section emphasizing the purpose that each section serves.

## Plan Summary

### Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to provide a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included in the subsequent sections of the LCAP.

### Requirements and Instructions

**General Information** – Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA. For example, information about an LEA in terms of geography, enrollment, or employment, the number and size of specific schools, recent community challenges, and other such information as an LEA wishes to include can enable a reader to more fully understand an LEA's LCAP.

**Reflections: Successes** – Based on a review of performance on the state indicators and local performance indicators included in the Dashboard, progress toward LCAP goals, local self-assessment tools, input from educational partners, and any other information, what progress is the LEA most proud of and how does the LEA plan to maintain or build upon that success? This may include identifying specific examples of how past increases or improvements in services for foster youth, English learners, and low-income students have led to improved performance for these students.

**Reflections: Identified Need** – Referring to the Dashboard, identify: (a) any state indicator for which overall performance was in the “Red” or “Orange” performance category or any local indicator where the LEA received a “Not Met” or “Not Met for Two or More Years” rating AND (b) any state indicator for which performance for any student group was two or more performance levels below the “all student” performance. What steps is the LEA planning to take to address these areas of low performance and performance gaps? An LEA that is required to include a goal to address one or more consistently low-performing student groups or low-performing schools must identify that it is required to include this goal and must also identify the applicable student group(s) and/or school(s). Other needs may be identified using locally collected data including data collected to inform the self-reflection tools and reporting local indicators on the Dashboard.

**LCAP Highlights** – Identify and briefly summarize the key features of this year's LCAP.

**Comprehensive Support and Improvement** – An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

- **Schools Identified:** Identify the schools within the LEA that have been identified for CSI.
- **Support for Identified Schools:** Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.
- **Monitoring and Evaluating Effectiveness:** Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

## Engaging Educational Partners

### Purpose

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, accountability, and improvement across the state priorities and locally identified priorities (*EC* Section 52064[e][1]). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

Statute and regulations specify the educational partners that school districts and COEs must consult when developing the LCAP: teachers, principals, administrators, other school personnel, local bargaining units of the LEA, parents, and students. Before adopting the LCAP, school districts and COEs must share it with the Parent Advisory Committee and, if applicable, to its English Learner Parent Advisory Committee. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

Statute requires charter schools to consult with teachers, principals, administrators, other school personnel, parents, and students in developing the LCAP. The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals and actions.

Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the following web page of the CDE's website: <https://www.cde.ca.gov/re/lc/>.

# Requirements and Instructions

Below is an excerpt from the 2018–19 *Guide for Annual Audits of K–12 Local Education Agencies and State Compliance Reporting*, which is provided to highlight the legal requirements for engagement of educational partners in the LCAP development process:

## **Local Control and Accountability Plan:**

For county offices of education and school districts only, verify the LEA:

- a) Presented the local control and accountability plan to the parent advisory committee in accordance with Education Code section 52062(a)(1) or 52068(a)(1), as appropriate.
- b) If applicable, presented the local control and accountability plan to the English learner parent advisory committee, in accordance with Education Code section 52062(a)(2) or 52068(a)(2), as appropriate.
- c) Notified members of the public of the opportunity to submit comments regarding specific actions and expenditures proposed to be included in the local control and accountability plan in accordance with Education Code section 52062(a)(3) or 52068(a)(3), as appropriate.
- d) Held at least one public hearing in accordance with Education Code section 52062(b)(1) or 52068(b)(1), as appropriate.
- e) Adopted the local control and accountability plan in a public meeting in accordance with Education Code section 52062(b)(2) or 52068(b)(2), as appropriate.

**Prompt 1:** “A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP.”

Describe the engagement process used by the LEA to involve educational partners in the development of the LCAP, including, at a minimum, describing how the LEA met its obligation to consult with all statutorily required educational partners as applicable to the type of LEA. A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA’s philosophical approach to engaging its educational partners.

**Prompt 2:** “A summary of the feedback provided by specific educational partners.”

Describe and summarize the feedback provided by specific educational partners. A sufficient response to this prompt will indicate ideas, trends, or inputs that emerged from an analysis of the feedback received from educational partners.



**Prompt 3:** “A description of the aspects of the LCAP that were influenced by specific input from educational partners.”

A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. The response must describe aspects of the LCAP that were influenced by or developed in response to the educational partner feedback described in response to Prompt 2. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP. For the purposes of this prompt, “aspects” of an LCAP that may have been influenced by educational partner input can include, but are not necessarily limited to:

- Inclusion of a goal or decision to pursue a Focus Goal (as described below)
- Inclusion of metrics other than the statutorily required metrics
- Determination of the desired outcome on one or more metrics
- Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
- Inclusion of action(s) or a group of actions
- Elimination of action(s) or group of actions
- Changes to the level of proposed expenditures for one or more actions
- Inclusion of action(s) as contributing to increased or improved services for unduplicated students
- Determination of effectiveness of the specific actions to achieve the goal
- Determination of material differences in expenditures
- Determination of changes made to a goal for the ensuing LCAP year based on the annual update process
- Determination of challenges or successes in the implementation of actions

## Goals and Actions

### Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal should be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

# Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs should consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard in determining whether and how to prioritize its goals within the LCAP.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- **Focus Goal:** A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.
- **Broad Goal:** A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.
- **Maintenance of Progress Goal:** A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

At a minimum, the LCAP must address all LCFF priorities and associated metrics.

## ***Focus Goal(s)***

**Goal Description:** The description provided for a Focus Goal must be specific, measurable, and time bound. An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach. The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

**Explanation of why the LEA has developed this goal:** Explain why the LEA has chosen to prioritize this goal. An explanation must be based on Dashboard data or other locally collected data. LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners. LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

## ***Broad Goal***

**Goal Description:** Describe what the LEA plans to achieve through the actions included in the goal. The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal. The goal description organizes the actions and expected outcomes in a cohesive and consistent manner. A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

**Explanation of why the LEA has developed this goal:** Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

### ***Maintenance of Progress Goal***

**Goal Description:** Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP. Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP. The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

**Explanation of why the LEA has developed this goal:** Explain how the actions will sustain the progress exemplified by the related metrics.

### ***Required Goals***

In general, LEAs have flexibility in determining what goals to include in the LCAP and what those goals will address; however, beginning with the development of the 2022–23 LCAP, LEAs that meet certain criteria are required to include a specific goal in their LCAP.

**Consistently low-performing student group(s) criteria:** An LEA is eligible for Differentiated Assistance for three or more consecutive years based on the performance of the same student group or groups in the Dashboard. A list of the LEAs required to include a goal in the LCAP based on student group performance, and the student group(s) that lead to identification, may be found on the CDE’s Local Control Funding Formula web page at <https://www.cde.ca.gov/fq/aa/lc/>.

- **Consistently low-performing student group(s) goal requirement:** An LEA meeting the consistently low-performing student group(s) criteria must include a goal in its LCAP focused on improving the performance of the student group or groups that led to the LEA’s eligibility for Differentiated Assistance. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, this student group or groups. An LEA required to address multiple student groups is not required to have a goal to address each student group; however, each student group must be specifically addressed in the goal. This requirement may not be met by combining this required goal with another goal.
- **Goal Description:** Describe the outcomes the LEA plans to achieve to address the needs of, and improve outcomes for, the student group or groups that led to the LEA’s eligibility for Differentiated Assistance.
- **Explanation of why the LEA has developed this goal:** Explain why the LEA is required to develop this goal, including identifying the student group(s) that lead to the LEA being required to develop this goal, how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the student group(s), and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes identified in the goal description.

**Low-performing school(s) criteria:** The following criteria only applies to a school district or COE with two or more schools; it does not apply to a single-school district. A school district or COE has one or more schools that, for two consecutive years, received the two lowest performance levels on all but one of the state indicators for which the school(s) receive performance levels in the Dashboard and the performance of the “All Students” student group for the LEA is at least one performance level higher in all of those indicators. A list of the LEAs required to include a goal in the LCAP based on school performance, and the school(s) that lead to identification, may be found on the CDE’s Local Control Funding Formula web page at <https://www.cde.ca.gov/fq/aa/lc/>.

- **Low-performing school(s) goal requirement:** A school district or COE meeting the low-performing school(s) criteria must include a goal in its LCAP focusing on addressing the disparities in performance between the school(s) and the LEA as a whole. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, the students enrolled at the low-performing school or schools. An LEA required to address multiple schools is not required to have a goal to address each school; however, each school must be specifically addressed in the goal. This requirement may not be met by combining this goal with another goal.
- **Goal Description:** Describe what outcomes the LEA plans to achieve to address the disparities in performance between the students enrolled at the low-performing school(s) and the students enrolled at the LEA as a whole.
- **Explanation of why the LEA has developed this goal:** Explain why the LEA is required to develop this goal, including identifying the schools(s) that lead to the LEA being required to develop this goal; how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the school(s); and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes for students enrolled at the low-performing school or schools identified in the goal description.

### ***Measuring and Reporting Results:***

For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes. LEAs are encouraged to identify metrics for specific student groups, as appropriate, including expected outcomes that would reflect narrowing of any existing performance gaps.

Include in the baseline column the most recent data associated with this metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2019 Dashboard for the baseline of a metric only if that data represents the most recent available (e.g., high school graduation rate).

Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS. Because final 2020–21 outcomes on some metrics may not be computable at the time the 2021–24 LCAP is adopted (e.g., graduation rate, suspension rate), the most recent data available may include a point in time calculation taken each year on the same date for comparability purposes.

The baseline data shall remain unchanged throughout the three-year LCAP.

Complete the table as follows:

- **Metric:** Indicate how progress is being measured using a metric.
- **Baseline:** Enter the baseline when completing the LCAP for 2021–22. As described above, the baseline is the most recent data associated with a metric. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 1 Outcome:** When completing the LCAP for 2022–23, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 2 Outcome:** When completing the LCAP for 2023–24, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 3 Outcome:** When completing the LCAP for 2024–25, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above. The 2024–25 LCAP will be the first year in the next three-year cycle. Completing this column will be part of the Annual Update for that year.
- **Desired Outcome for 2023–24:** When completing the first year of the LCAP, enter the desired outcome for the relevant metric the LEA expects to achieve by the end of the 2023–24 LCAP year.

Timeline for completing the “**Measuring and Reporting Results**” part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for Year 3 (2023–24)
Enter information in this box when completing the LCAP for <b>2021–22</b> .	Enter information in this box when completing the LCAP for <b>2021–22</b> .	Enter information in this box when completing the LCAP for <b>2022–23</b> . Leave blank until then.	Enter information in this box when completing the LCAP for <b>2023–24</b> . Leave blank until then.	Enter information in this box when completing the LCAP for <b>2024–25</b> . Leave blank until then.	Enter information in this box when completing the LCAP for <b>2021–22</b> or when adding a new metric.

The metrics may be quantitative or qualitative; but at minimum, an LEA's LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year as applicable to the type of LEA. To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant self-reflection tool for local indicators within the Dashboard.

**Actions:** Enter the action number. Provide a short title for the action. This title will also appear in the action tables. Provide a description of the action. Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the summary tables. Indicate whether the action contributes to meeting the increase or improved services requirement as described in the Increased or Improved Services section using a "Y" for Yes or an "N" for No. (**Note:** for each such action offered on an LEA-wide or schoolwide basis, the LEA will need to provide additional information in the Increased or Improved Summary Section to address the requirements in *California Code of Regulations*, Title 5 [5 CCR] Section 15496(b) in the Increased or Improved Services Section of the LCAP).

**Actions for English Learners:** School districts, COEs, and charter schools that have a numerically significant English learner student subgroup must include specific actions in the LCAP related to, at a minimum, the language acquisition programs, as defined in *EC* Section 306, provided to students and professional development activities specific to English learners.

**Actions for Foster Youth:** School districts, COEs, and charter schools that have a numerically significant Foster Youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to Foster Youth students.

## **Goal Analysis:**

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective in achieving the goal. Respond to the prompts as instructed.

- Describe the overall implementation of the actions to achieve the articulated goal. Include a discussion of relevant challenges and successes experienced with the implementation process. This must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.
- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.
- Describe the effectiveness of the specific actions to achieve the articulated goal as measured by the LEA. In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal. When responding to this prompt, LEAs

may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.

- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.

## Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

### Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA's description in this section must align with the actions included in the Goals and Actions section as contributing.

### Requirements and Instructions

***Projected LCFF Supplemental and/or Concentration Grants:*** Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of low income, foster youth, and English learner students.

***Projected Additional LCFF Concentration Grant (15 percent):*** Specify the amount of additional LCFF concentration grant add-on funding, as described in *EC* Section 42238.02, that the LEA estimates it will receive in the coming year.

***Projected Percentage to Increase or Improve Services for the Coming School Year:*** Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 *CCR* Section 15496(a)(7).

***LCFF Carryover — Percentage:*** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

**LCFF Carryover — Dollar:** Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero (\$0).

**Total Percentage to Increase or Improve Services for the Coming School Year:** Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEAs percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 CCR Section 15496(a)(7).

**Required Descriptions:**

**For each action being provided to an entire school, or across the entire school district or COE, an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.**

For each action included in the Goals and Actions section as contributing to the increased or improved services requirement for unduplicated pupils and provided on an LEA-wide or schoolwide basis, the LEA must include an explanation consistent with 5 CCR Section 15496(b). For any such actions continued into the 2021–24 LCAP from the 2017–2020 LCAP, the LEA must determine whether or not the action was effective as expected, and this determination must reflect evidence of outcome data or actual implementation to date.

**Principally Directed and Effective:** An LEA demonstrates how an action is principally directed towards and effective in meeting the LEA's goals for unduplicated students when the LEA explains how:

- It considers the needs, conditions, or circumstances of its unduplicated pupils;
- The action, or aspect(s) of the action (including, for example, its design, content, methods, or location), is based on these considerations; and
- The action is intended to help achieve an expected measurable outcome of the associated goal.

As such, the response provided in this section may rely on a needs assessment of unduplicated students.

Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient. Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increase or improve services standard because enrolling students is not the same as serving students.

For example, if an LEA determines that low-income students have a significantly lower attendance rate than the attendance rate for all students, it might justify LEA-wide or schoolwide actions to address this area of need in the following way:



After assessing the needs, conditions, and circumstances of our low-income students, we learned that the attendance rate of our low-income students is 7 percent lower than the attendance rate for all students. (Needs, Conditions, Circumstances [Principally Directed])

In order to address this condition of our low-income students, we will develop and implement a new attendance program that is designed to address some of the major causes of absenteeism, including lack of reliable transportation and food, as well as a school climate that does not emphasize the importance of attendance. Goal N, Actions X, Y, and Z provide additional transportation and nutritional resources as well as a districtwide educational campaign on the benefits of high attendance rates. (Contributing Action[s])

These actions are being provided on an LEA-wide basis and we expect/hope that all students with less than a 100 percent attendance rate will benefit. However, because of the significantly lower attendance rate of low-income students, and because the actions meet needs most associated with the chronic stresses and experiences of a socio-economically disadvantaged status, we expect that the attendance rate for our low-income students will increase significantly more than the average attendance rate of all other students. (Measurable Outcomes [Effective In])

**COEs and Charter Schools:** Describe how actions included as contributing to meeting the increased or improved services requirement on an LEA-wide basis are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above. In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

## **For School Districts Only:**

### **Actions Provided on an LEA-Wide Basis:**

***Unduplicated Percentage > 55 percent:*** For school districts with an unduplicated pupil percentage of 55 percent or more, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above.

***Unduplicated Percentage < 55 percent:*** For school districts with an unduplicated pupil percentage of less than 55 percent, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities. Also describe how the actions **are the most effective use of the funds** to meet these goals for its unduplicated pupils. Provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

### **Actions Provided on a Schoolwide Basis:**

School Districts must identify in the description those actions being funded and provided on a schoolwide basis, and include the required description supporting the use of the funds on a schoolwide basis.

**For schools with 40 percent or more enrollment of unduplicated pupils:** Describe how these actions are principally directed to and effective in meeting its goals for its unduplicated pupils in the state and any local priorities.

**For school districts expending funds on a schoolwide basis at a school with less than 40 percent enrollment of unduplicated pupils:** Describe how these actions are principally directed to and how the actions are the most effective use of the funds to meet its goals for foster youth, English learners, and low-income students in the state and any local priorities.

**A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.**

Consistent with the requirements of 5 CCR Section 15496, describe how services provided for unduplicated pupils are increased or improved by at least the percentage calculated as compared to the services provided for all students in the LCAP year. To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are included in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided on an LEA-wide or schoolwide basis or provided on a limited basis to unduplicated students. A limited action is an action that only serves foster youth, English learners, and/or low-income students. This description must address how these action(s) are expected to result in the required proportional increase or improvement in services for unduplicated pupils as compared to the services the LEA provides to all students for the relevant LCAP year.

For any action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage. See the instructions for determining the Planned Percentage of Improved Services for information on calculating the Percentage of Improved Services.

**A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.**

An LEA that receives the additional concentration grant add-on described in EC Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.

Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.

An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.

In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of full time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.
- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

## Action Tables

Complete the Data Entry Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Data Entry Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. With the exception of the Data Entry Table, the word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)
- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2022–23 LCAP, 2022–23 will be the coming LCAP Year and 2021–22 will be the current LCAP Year.

## Data Entry Table

The Data Entry Table may be included in the LCAP as adopted by the local governing board or governing body, but is not required to be included. In the Data Entry Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year:** Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant:** Provide the total amount of LCFF funding the LEA estimates it will receive for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 CCR Section 15496(a)(8).

See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF apportionment calculations.

- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will receive on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 CCR Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.

- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover — Percentage. This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.
- **Goal #:** Enter the LCAP Goal number for the action.
- **Action #:** Enter the action's number as indicated in the LCAP Goal.
- **Action Title:** Provide a title of the action.
- **Student Group(s):** Indicate the student group or groups who will be the primary beneficiary of the action by entering "All," or by entering a specific student group or groups.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services.
- If "Yes" is entered into the Contributing column, then complete the following columns:
  - **Scope:** The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.
  - **Unduplicated Student Group(s):** Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
  - **Location:** Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate "All Schools." If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter "Specific Schools" or "Specific Grade Spans." Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.

- **Time Span:** Enter “ongoing” if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter “1 Year,” or “2 Years,” or “6 Months.”
- **Total Personnel:** Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel:** This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.
- **LCFF Funds:** Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA’s total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
  - **Note:** For an action to contribute towards meeting the increased or improved services requirement it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds:** Enter the total amount of Other State Funds utilized to implement this action, if any.
- **Local Funds:** Enter the total amount of Local Funds utilized to implement this action, if any.
- **Federal Funds:** Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds:** This amount is automatically calculated based on amounts entered in the previous four columns.
- **Planned Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.
  - As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which the LEA estimates would cost \$165,000.

Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Service for the action.

## Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the 'Contributing to Increased or Improved Services?' column will need to be checked to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses.

## Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures:** Enter the total estimated actual expenditures to implement this action, if any.

## Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the 'Contributing to Increased or Improved Services?' column to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- **Estimated Actual Expenditures for Contributing Actions:** Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.
- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).

- Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been \$169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of \$169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

## LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant:** Provide the total amount of LCFF funding the LEA estimates it will receive for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 CCR Section 15496(a)(8).
- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 CCR Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

## Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

### ***Contributing Actions Table***

- 4. Total Planned Contributing Expenditures (LCFF Funds)
  - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column
- 5. Total Planned Percentage of Improved Services
  - This percentage is the total of the Planned Percentage of Improved Services column
- Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)



- This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

### ***Contributing Actions Annual Update Table***

Pursuant to *EC* Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- 6. Estimated Actual LCFF Supplemental and Concentration Grants
  - This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- 4. Total Planned Contributing Expenditures (LCFF Funds)
  - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)
- 7. Total Estimated Actual Expenditures for Contributing Actions
  - This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds)
- Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)
  - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4)
- 5. Total Planned Percentage of Improved Services (%)
  - This amount is the total of the Planned Percentage of Improved Services column
- 8. Total Estimated Actual Percentage of Improved Services (%)
  - This amount is the total of the Estimated Actual Percentage of Improved Services column
- Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)

- This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8)

### ***LCFF Carryover Table***

- 10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)
  - This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.
- 11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)
  - This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).
- 12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)
  - If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.  
  
The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.
- 13. LCFF Carryover — Percentage (12 divided by 9)
  - This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education  
January 2022



## **ILEAD Hybrid**

**CDS: 1975309031987**

### **FY 2022/2023 Budget Narrative**

Provided within are the following documents in conjunction with the Preliminary Budget for the 2022/2023 school year.

- 2022/2023 Preliminary Budget Alternative Form and original signed Form Certification.
- A Multi-Year Projection (MYP) 2022/2023, and two out years, 2023/2024, and 2024/2025
- Excel file copy of the 2022/2023 Preliminary Budget FCMAT Calculator.
- Cash flow projection for 2022/2023
- Form Debt

This provides a written explanation of enrollment and average daily attendance (ADA), revenue, expense, deficit spending, fund balance, reserves, debt, and cash, and addresses changes in anticipated enrollment, average daily attendance, revenues, and expenses. Accompanying this written narrative are the following documents:

#### **Enrollment/Average Daily Attendance (ADA)**

The projected enrollment and average daily attendance for are as follows:

	<b><u>Estimated Actuals</u></b> <b><u>FY 2021-22</u></b>	<b><u>Preliminary Budget</u></b> <b><u>FY 2022-23</u></b>
Enrollment	3,832	3,907
Total ADA	3,769.04	3,829.14

Certified P-2 was used for the Estimated Actuals calculations.

Growth of 5 ADA is projected for the charter school.

Enrollment at iLEAD Hybrid was at 3,962 as of June 17, 2022, with budgeted enrollment at 3,907 for the FY 22/23 school year, allowing for some attrition during the summer. iLEAD Hybrid has



traditionally grown over the summer, and a revised budget is enacted in the fall to reflect actual enrollment once the school year commences.

## Revenue

	<b>Estimated Actuals</b>	<b>Preliminary Budget</b>
	<b>FY 2021-22</b>	<b>FY 2022-23</b>
8011 - State Funding - Current Year LCFF	34,593,348	36,046,836
8012 - State Funding - EPA	766,012	765,828
8096 - State Funding - Property Taxes	2,062,985	2,165,072
8181 - Federal Special Education - Entitlement	455,933	495,875
8220 - Federal Child Nutrition Programs	53,528	57,575
8290 - Federal Revenue - All Other Federal Revenue (Title I, II, IV)	365,601	505,409
8291 - Federal Revenue - Other Revenue (ESSER II, ESSER III, ESSER ELO)	124,637	2,250,000
8311 - Other State Apportionments - Special Education	2,582,795	2,997,224
8312 - Other State Apportionments - Special Education Mental Health	86,504	38,301
8520 - State Child Nutrition	2,321	2,995
8550 - State Mandated Costs	153,634	89,282
8560 - State Lottery	762,170	873,254
8590 - All Other State Revenues (ELO, TK Funds, Educator Effectiveness)	11,592	960,274
8690 - Misc Local Income	2,306,729	5,000
<b>Total Revenue</b>	<b>44,327,788</b>	<b>47,252,925</b>

The Charter School is a recipient of several restricted federal and state revenues including State and Federal Nutrition funds, Title I, II, and IV, ESSER II, ESSER III, ELO-G, State and Federal Special Education Funds. The school has detailed spending plans in place for each of the special funding sources and complies with reporting requirements as needs. All revenue calculations are based



on either the most recent version of the FCMAT calculator (LCFF), or prior year per pupil funding factors listed in the most recent iteration of the School Services of California Dartboard, CDE notices and exhibits, or SELPA guidance documents.

Funding factors used to generate the projected revenue were derived from the LCFF Calculator, as well as School Services of California Dartboard, and EL Dorado Charter SELPA, and are included below:

### Expenses

The charter maintains a reasonable range of budgeted expenditures. Total personnel expenditures (1000s – 3000s) are \$23,625,079, and are divided among certificated salaries (\$15,390,936), classified salaries (\$2,160,027), and employee benefits (\$6,074,116). Books and instructional supplies (4000s) total \$10,625,499. Other services and operating expenses (5000s) comprise \$11,852,689 of total expenditures, with the majority of expenditures in the 5000s allocated for rent, utilities, service fees.

<b>EXPENDITURES</b>		<b><u>Estimated Actuals 2021-22</u></b>	<b><u>Preliminary Budget 2022-23</u></b>
<b>Personnel</b>			
1000	Certificated Salaries	14,203,523	15,390,936
2000	Classified Salaries	1,882,173	2,160,027
3101	State Teachers Retirement System (STRS)	2,364,130	2,939,669
3000	Non-STRS Employee Benefits	1,645,155	3,134,447
	<b>Total Personnel</b>	<b>4,009,285</b>	<b>6,074,116</b>
<b>Books and Supplies</b>			
4100	Curriculum & Education Software	259,409	290,693
4200	Books and Reference Materials	486	403
4300	Materials and Supplies	8,341,001	9,939,590
4400	Equipment and Supplies	266,757	335,189
4700	Food Supplies	54,772	59,624
	<b>Total Books and Supplies</b>	<b>8,922,425</b>	<b>10,625,499</b>



<b>Services and Operations</b>			
5200	Travel and Conferences	41,388	127,000
5300	Dues and Memberships	75,508	78,000
5400	Insurance	153,816	154,849
5500	Operations - Utilities, Waste Disposal, Janitorial, Security	58,193	59,045
5600	Facilities - Rent, Maintenance, Repairs	350,348	408,974
5800	Professional Services, Operating Expenditures, Student Services	10,487,447	10,915,715
5900	Communications - Phone, Internet, Postage	104,489	109,106
6000	Depreciation Expense - Equipment		
	<b>Total Services and Operations</b>	<b>11,271,189</b>	<b>11,852,689</b>
	<b>Total Expenditures</b>	<b>40,288,595</b>	<b>46,103,267</b>

### **Debt**

The charter school has repaid all debt that was formerly owed through the ASAP TRAN program, as well as the CSFA Revolving Loan Program, and has Paycheck Protection Program (PPP), with no debts at this time.

### **Deficit Spending**

The Charter School does not anticipate deficit spending. There are no Notices of Assignments. There is no assignment or commitment of any end balance monies at this time.

Net income for FY 22/23 is projected at \$1,149,558, or 2.5% of FY22/23 Expense.

The iLEAD Hybrid fund balance (unaudited) at June 30, 2022 is estimated to be \$5,712,211, exceeding the 5% set-aside for economic uncertainty.