



## MEETING AGENDA - iLEAD Lancaster 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 main office of the school between 9:00 am and 3:30 pm.

### Meeting

<b>Meeting Date</b>	Thursday, June 30, 2022
<b>Start Time</b>	6:00 PM
<b>End Time</b>	7:00 PM
<b>Location</b>	This meeting will take place virtually. You may join us at: Zoom <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:** 6/30/2022

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1.5. Approve Minutes

**Due date:** 6/30/2022

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#### Documents

- Minutes-2022-06-23-v2.pdf
- 

#### 2. Public Comments

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##### 2.1. Public Comments

The public may address the iLEAD Lancaster 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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#### 3. Discussion And Reports

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##### 3.1. 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 Lancaster CHARTER SCHOOLS - Form 990 2020 Client Copy.pdf
- 

## 4. Action Items

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### 4.1. 2021-2022 Annual Independent Auditor Agreement

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

**Due date:** 6/30/2022

#### Documents

- iLEAD Lancaster - 22 CLA Audit Engagement Letter.pdf
- 

### 4.2. Educational Protection Account Resolution

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

**Due date:** 6/30/2022

#### Documents

- FY22.23 iLEAD Lancaster EPA Resolution .pdf
- 

### 4.3. LCAP

Discuss and take action regarding the 2022 - 2025 LCAP.

**Due date:** 6/30/2022

#### Documents

- 21-24 iLEAD Lancaster DRAFT LCAP.pdf
- 

### 4.4. 21-22 Estimated Actuals and Multyear School Budget

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

**Due date:** 6/30/2022

#### Documents

- 2022-23 iLEAD Lancaster Preliminary Budget Alternative Form and MYP.pdf
- 

### 4.5. Revised Cell Phone Policy

Discuss and take action regarding the revised Cell Phone policy.

**Due date:** 6/30/2022

#### Documents

- Revised - Cell Phone Policy- Lancaster.docx (1).pdf
- 

### 4.6. 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:** 6/30/2022

#### Documents

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



#### 4.7. Revised iLEAD CA Service Agreement

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

**Due date:** 6/30/2022

##### Documents

- iCA Updated Service Agreement 22-23.pdf
  - 2022-2023 iCA Strategic Goals and Accomplishments 21-22.pptx.pdf
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#### 4.8. iCA Special Education Shared Service Agreement

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

**Due date:** 6/30/2022

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#### 4.9. 2022 - 2023 Board Meeting Dates

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

**Due date:** 6/30/2022

##### Documents

- Draft - 2022-2023 Board Calendar -iLEAD Lancaster.pdf
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#### 4.10. 2022-2023 Insurance Policies

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

**Due date:** 6/30/2022

##### Documents

- Lancaster Board Resolution - Insurance Policy 2022-2023.pdf
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### 5. Board Comments

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#### 5.1. Board Comments

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### 6. Closing Items

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#### 6.1. Next Meeting Date

Our next regularly scheduled Board Meeting will be announced.

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#### 6.2. 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 Lancaster Board

### Meeting

<b>Date</b>	Thursday, June 23, 2022
<b>Started</b>	6:05 PM
<b>Ended</b>	7:18 PM
<b>Location</b>	This meeting will be held virtually. You may join us at: Zoom <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>	Kim Lytle
<b>Recorder</b>	KeKe Montoya

### Minutes

## 1. Opening Items

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### 1.1. Call The Meeting To Order

The meeting was called to order at 6:05 PM.

**Status:** Completed

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### 1.2. Roll Call

All Board Members were 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

Motioned: Beth

Seconded: LaTorra

Unanimously Approved

**Due date:**

**Status:** Completed

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### 1.5. Approve Minutes

Motioned: LaNeshae

Seconded: Beth

Unanimously Approved



**Due date:**

**Status:** Completed

Documents

- Minutes-2022-05-12-v2 (1).pdf
- 

## 2. Closed Session

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### 2.1. Conference with Legal Counsel - Anticipated Litigation

Gov. Code section 54956.9(d)(2): 1 Matter

Closed Session took place from 6:08 PM to 7:10 PM.

**Status:** Completed

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### 2.2. Public Employee Performance Evaluation

Gov. Code section 54957(b)(1): School Director

**Status:** Completed

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## 3. Report of Closed Session

Nothing was reported from the Closed Session - No Vote Taken.

LaNeshae is absent after the Closed Session concluded.

**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 LCAP. No public comments made.

**Status:** Completed

Documents

- iLEAD Lancaster DRAFT LCAP.pdf
  - Lancaster FY22.23 Preliminary Budget for Board Presentation.pdf
- 

## 5. Public Comments

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### 5.1. Public Comments

The public may address the iLEAD Lancaster 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 comments were made.

**Status:** Completed

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## 6. Consent Items

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### 6.1. Personnel Report

Motioned: LaTorra

Seconded: Beth

Unanimously Approved

**Due date:**

**Status:** Completed

Documents

- \_Personnel Report\_Lancaster 6.14.2022.pdf

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### 6.2. Check Register

Motioned: LaTorra

Seconded: Beth

Unanimously Approved

**Due date:**

**Status:** Completed

Documents

- Lancaster Payment Register\_20220615.pdf

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

Motioned: LaTorra

Seconded: Beth

Unanimously Approved

**Due date:**

**Status:** Completed

Documents

- iLEAD Lancaster - AB 361 Emergency Legislation Regarding Brown Act Meeting Requirements (8).pdf

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## 7. Action Items

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### 7.1. School Director Employment Agreement

Discuss and take action regarding the School Director employment agreement.

Latorra reported the School Director's Employment would be extended throughout the 2022-2023 school year with a 5% pay increase bringing her annual pay to \$129,018.96. She will be entitled to participate in the employee benefit program at the same rate of employer pay as all current employees which currently is at \$650 per month.

Motioned: LaTorra

Seconded: Beth



Unanimously Approved

**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 presented the Transitional Kindergarten Implementation Plan.

Motioned: LaTorra

Seconded: Beth

Unanimously Approved

**Due date:**

**Status:** Completed

Documents

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

## 7.3. Admissions and Enrollment Policy

Discuss and take action regarding Admissions and Enrollment Policy.

Cassandra presented the Admissions and Enrollment Policy.

Motioned: LaTorra

Seconded: Beth

Unanimously Approved

**Due date:**

**Status:** Completed

Documents

- iLEAD Lancaster Admissions and Enrollment Policy.pdf
- 

## 7.4. 2022 - 2023 Family Guidebook

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

Cassandra presented the 2022-2023 Family Guidebook.

Motioned: LaTorra

Seconded: Beth

Unanimously Approved

**Due date:**

**Status:** Completed

Documents

- 2022-2023 iLEAD Lancaster Family Guidebook .pdf
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## 8. Board Comments

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### 8.1. Board Comments

LaTorra thanked everyone behind the scenes for their hard work and a job well done.

**Status:** Completed

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## 9. Closing Items

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### 9.1. Next Meeting Date

Our next regularly scheduled meeting will be held on Thursday, June 30, 2022 at 6:00 PM.

Our next regularly scheduled Board meeting will be held on Thursday, June 30, 2022 at 6:00 P.

**Status:** Completed

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### 9.2. Adjournment

The meeting was adjourned at 7:18 PM.

**Status:** Completed

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CliftonLarsonAllen LLP  
CLAconnect.com

**ILEAD CHARTER SCHOOLS**  
**FORM 990 INCOME TAX RETURN**  
**FOR YEAR ENDED JUNE 30, 2021**



CliftonLarsonAllen LLP  
CLAconnect.com

ILEAD CHARTER SCHOOLS  
254 EAST AVENUE K-4  
LANCASTER, CA 93535

ILEAD CHARTER SCHOOLS:

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 CHARTER SCHOOLS****45-4768181**

Name and title of officer or person subject to tax

**LATORRA SAXTON****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>10,479,618.</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 **22100**  
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)

Form **990**Department of the Treasury  
Internal Revenue Service**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** Check if applicable:

- ☐ Address change  
☐ Name change  
☐ Initial return  
☐ Final return/terminated  
☐ Amended return  
☐ Application pending

**C** Name of organization**ILEAD CHARTER SCHOOLS**Doing business as **ILEAD LANCASTER CHARTER SCHOOL**

Number and street (or P.O. box if mail is not delivered to street address)

**254 EAST AVENUE K-4**

Room/suite

City or town, state or province, country, and ZIP or foreign postal code

**LANCASTER, CA 93535****F** Name and address of principal officer: **LATORRA SAXTON****254 EAST AVENUE K-4, LANCASTER, CA 93535****D** Employer identification number**45-4768181****E** Telephone number**661-722-4287****G** Gross receipts \$ **10,479,618.****H(a)** Is this a group returnfor subordinates? ..... ☐ Yes ☒ No**H(b)** Are all subordinates included? ☐ Yes ☐ No

If "No," attach a list. See instructions

**H(c)** Group exemption number ▶**I** Tax-exempt status: ☒ 501(c)(3) ☐ 501(c) ( ) (insert no.) ☐ 4947(a)(1) or ☐ 527**J** Website: ▶ **WWW.ILEADCHARTERSCHOOL.ORG****K** Form of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other ▶**L** Year of formation: **2012** **M** State of legal domicile: **CA****Part I Summary**

<b>Activities &amp; Governance</b>	<b>1</b>	Briefly describe the organization's mission or most significant activities: <b>ILEAD LANCASTER IS A CHARTER SCHOOL SERVING STUDENTS IN K-8TH GRADE.</b>		
	<b>2</b>	Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	<b>3</b>	Number of voting members of the governing body (Part VI, line 1a)	<b>3</b>	
	<b>4</b>	Number of independent voting members of the governing body (Part VI, line 1b)	<b>3</b>	
	<b>5</b>	Total number of individuals employed in calendar year 2020 (Part V, line 2a)	<b>118</b>	
	<b>6</b>	Total number of volunteers (estimate if necessary)	<b>3</b>	
	<b>7a</b>	Total unrelated business revenue from Part VIII, column (C), line 12	<b>0.</b>	
<b>7b</b>	Net unrelated business taxable income from Form 990-T, Part I, line 11	<b>0.</b>		
<b>Revenue</b>	<b>8</b>	Contributions and grants (Part VIII, line 1h)	<b>Prior Year</b> <b>8,658,032.</b>	<b>Current Year</b> <b>10,476,094.</b>
	<b>9</b>	Program service revenue (Part VIII, line 2g)	<b>0.</b>	<b>0.</b>
	<b>10</b>	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	<b>366.</b>	<b>0.</b>
	<b>11</b>	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	<b>893,933.</b>	<b>3,524.</b>
	<b>12</b>	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	<b>9,552,331.</b>	<b>10,479,618.</b>
	<b>Expenses</b>	<b>13</b>	Grants and similar amounts paid (Part IX, column (A), lines 1-3)	<b>0.</b>
<b>14</b>		Benefits paid to or for members (Part IX, column (A), line 4)	<b>0.</b>	<b>0.</b>
<b>15</b>		Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	<b>4,810,384.</b>	<b>4,718,719.</b>
<b>16a</b>		Professional fundraising fees (Part IX, column (A), line 11e)	<b>0.</b>	<b>0.</b>
<b>b</b>		Total fundraising expenses (Part IX, column (D), line 25) ▶ <b>0.</b>		
<b>17</b>		Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	<b>3,138,043.</b>	<b>4,797,075.</b>
<b>18</b>		Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	<b>7,948,427.</b>	<b>9,515,794.</b>
<b>19</b>	Revenue less expenses. Subtract line 18 from line 12	<b>1,603,904.</b>	<b>963,824.</b>	
<b>Net Assets or Fund Balances</b>	<b>20</b>	Total assets (Part X, line 16)	<b>Beginning of Current Year</b> <b>4,185,362.</b>	<b>End of Year</b> <b>7,716,419.</b>
	<b>21</b>	Total liabilities (Part X, line 26)	<b>1,340,028.</b>	<b>3,907,261.</b>
	<b>22</b>	Net assets or fund balances. Subtract line 21 from line 20	<b>2,845,334.</b>	<b>3,809,158.</b>

**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.

<b>Sign Here</b>	Signature of officer	Date			
	<b>LATORRA SAXTON, PRESIDENT</b> Type or print name and title				
<b>Paid Preparer Use Only</b>	Print/Type preparer's name <b>WADE MCMULLEN</b>	Preparer's signature <b>WADE MCMULLEN</b>	Date <b>05/11/22</b>	Check if self-employed <input type="checkbox"/>	PTIN <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 GLEN DORA, CA 91740</b>	Phone no. (626) <b>857-7300</b>			

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

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

**THE MISSION OF ILEAD LANCASTER CHARTER SCHOOL IS TO EMPOWER STUDENTS TO BECOME CONSCIENTIOUS, COMPASSIONATE, AND RESPONSIBLE CITIZENS OF THE WORLD.**

**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 \$ 7,326,541. including grants of \$ ) (Revenue \$ 3,524. )

**ILEAD LANCASTER CREATES OPEN, FUN MULTIAGE K-8 LEARNING ENVIRONMENTS THAT PROMOTE DEEPER UNDERSTANDING AND CELEBRATE INDEPENDENT CRITICAL THINKING, COOPERATION, AND THE DEVELOPMENT OF CRUCIAL 21ST-CENTURY SKILLS. ILEAD LANCASTER'S MISSION IS TO PROVIDE A LASTING EDUCATIONAL EXPERIENCE THAT PREPARES YOUR LEARNER FOR HIGHER EDUCATION AND LIFELONG SUCCESS. DURING THE JUNE 30, 2021 YEAR END, ILEAD LANCASTER SERVED APPROXIMATELY 800 STUDENTS IN K-8TH GRADE AND HAD APPROXIMATELY 175 INSTRUCTIONAL DAYS.**

**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 **7,326,541.**Form **990** (2020)

**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>	38
<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> 118		
<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

☒ X

**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	3													
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		3												
<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**  
**254 EAST AVENUE K-4, LANCASTER, CA 93535**



**Part VII** Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(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>								115,813.	0.	20,102.
<b>c Total from continuation sheets to Part VII, Section A</b>								0.	0.	0.
<b>d Total (add lines 1b and 1c)</b>								115,813.	0.	20,102.

**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 **1**

- 3** Did the organization list any **former** officer, director, trustee, key employee, or highest compensated employee on line 1a? *If "Yes," complete Schedule J for such individual*
- 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? *If "Yes," complete Schedule J for such individual*
- 5** Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? *If "Yes," complete Schedule J for such person*

	Yes	No
3		X
4		X
5		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.

(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>	10,434,441.				
	<b>f</b> All other contributions, gifts, grants, and similar amounts not included above ...	<b>1f</b>	41,653.				
	<b>g</b> Noncash contributions included in lines 1a-1f	<b>1g</b>	\$				
	<b>h Total.</b> Add lines 1a-1f .....				10,476,094.		
<b>Program Service Revenue</b>			<b>Business Code</b>				
	<b>2 a</b> .....						
	<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 .....						
<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 .....						
		(i) Real	(ii) Personal				
	<b>6 a</b> Gross rents .....	<b>6a</b>					
	<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) .....						
		(i) Securities	(ii) Other				
	<b>7 a</b> Gross amount from sales of assets other than inventory .....	<b>7a</b>					
	<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>Business Code</b>				
	<b>11 a</b> OTHER REVENUE .....	611710		3,524.	3,524.		
	<b>b</b> .....						
	<b>c</b> .....						
	<b>d</b> All other revenue .....						
	<b>e Total.</b> Add lines 11a-11d .....				3,524.		
<b>12 Total revenue.</b> See instructions .....				10,479,618.	3,524.	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	136,782.	136,782.		
<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	3,625,436.	3,332,043.	293,393.	
<b>8</b> Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	393,025.	393,025.		
<b>9</b> Other employee benefits	447,275.	430,969.	16,306.	
<b>10</b> Payroll taxes	116,201.	110,243.	5,958.	
<b>11</b> Fees for services (nonemployees):				
<b>a</b> Management				
<b>b</b> Legal	125,398.		125,398.	
<b>c</b> Accounting	12,261.		12,261.	
<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.)	2,381,023.	755,940.	1,625,083.	
<b>12</b> Advertising and promotion	4,280.		4,280.	
<b>13</b> Office expenses	11,850.	11,850.		
<b>14</b> Information technology	293,921.	293,921.		
<b>15</b> Royalties				
<b>16</b> Occupancy	1,119,887.	1,119,887.		
<b>17</b> Travel	1,308.	1,308.		
<b>18</b> Payments of travel or entertainment expenses for any federal, state, or local public officials				
<b>19</b> Conferences, conventions, and meetings	26,709.	26,709.		
<b>20</b> Interest				
<b>21</b> Payments to affiliates				
<b>22</b> Depreciation, depletion, and amortization	52,034.	52,034.		
<b>23</b> Insurance	97,818.		97,818.	
<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>	518,496.	518,496.		
<b>b</b> <b>OPERATING EXPENSE</b>	152,090.	143,334.	8,756.	
<b>c</b>				
<b>d</b>				
<b>e</b> All other expenses				
<b>25</b> Total functional expenses. Add lines 1 through 24e	9,515,794.	7,326,541.	2,189,253.	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 .....	2,830,487.	<b>1</b>	4,240,526.
	<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 .....	967,310.	<b>4</b>	3,206,213.
	<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 .....	65,851.	<b>9</b>	
	<b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D .....	<b>10a</b> 715,945.		
	<b>b</b> Less: accumulated depreciation .....	<b>10b</b> 446,265.		
		321,714.	<b>10c</b>	269,680.
	<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) .....	4,185,362.	<b>16</b>	7,716,419.	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses .....	372,561.	<b>17</b>	1,769,910.
	<b>18</b> Grants payable .....		<b>18</b>	
	<b>19</b> Deferred revenue .....		<b>19</b>	478,581.
	<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>	5,553.
	<b>24</b> Unsecured notes and loans payable to unrelated third parties .....	967,467.	<b>24</b>	1,653,217.
	<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 .....	1,340,028.	<b>26</b>	3,907,261.
<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 .....	2,845,334.	<b>27</b>	3,809,158.
	<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> .....	2,845,334.	<b>32</b>	3,809,158.
	<b>33</b> <b>Total liabilities and net assets/fund balances</b> .....	4,185,362.	<b>33</b>	7,716,419.

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**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>	10,479,618.
<b>2</b>	Total expenses (must equal Part IX, column (A), line 25)	<b>2</b>	9,515,794.
<b>3</b>	Revenue less expenses. Subtract line 2 from line 1	<b>3</b>	963,824.
<b>4</b>	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	<b>4</b>	2,845,334.
<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>	3,809,158.

**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>	

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**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 .....		
<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 .....		
<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 .....		
<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 .....		
<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 .....		

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**

	Yes	No
<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.

**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 D**  
**(Form 990)**Department of the Treasury  
Internal Revenue Service**Supplemental Financial Statements**

▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.**  
▶ **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**

I LEAD CHARTER SCHOOLS

**Employer identification number**

45-4768181

**Part I****Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.** Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year .....		
2 Aggregate value of contributions to (during year) .....		
3 Aggregate value of grants from (during year) .....		
4 Aggregate value at end of year .....		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? .....	<input type="checkbox"/> Yes	<input type="checkbox"/> No
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? .....	<input type="checkbox"/> Yes	<input type="checkbox"/> No

**Part II****Conservation Easements.** Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).  
☐ Preservation of land for public use (for example, recreation or education) ☐ Preservation of a historically important land area  
☐ Protection of natural habitat ☐ Preservation of a certified historic structure  
☐ Preservation of open space

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Tax Year
a Total number of conservation easements .....	2a
b Total acreage restricted by conservation easements .....	2b
c Number of conservation easements on a certified historic structure included in (a) .....	2c
d Number of conservation easements included in (c) acquired after 7/25/06, and not on a historic structure listed in the National Register .....	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶ .....

4 Number of states where property subject to conservation easement is located ▶ .....

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? .....

☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ .....

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ \$ .....

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? .....

☐ Yes ☐ No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

**Part III****Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide in Part XIII the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenue included on Form 990, Part VIII, line 1 .....

▶ \$ .....

(ii) Assets included in Form 990, Part X .....

▶ \$ .....

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items:

a Revenue included on Form 990, Part VIII, line 1 .....

▶ \$ .....

b Assets included in Form 990, Part X .....

▶ \$ .....

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

Schedule D (Form 990) 2020

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets** (continued)

3 Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply):

a ☐ Public exhibition

d ☐ Loan or exchange program

b ☐ Scholarly research

e ☐ Other \_\_\_\_\_

c ☐ Preservation for future generations

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets

to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

**Part IV Escrow and Custodial Arrangements.** Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII and complete the following table:

c Beginning balance

d Additions during the year

e Distributions during the year

f Ending balance

	Amount
1c	
1d	
1e	
1f	

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII ☐

**Part V Endowment Funds.** Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

a Board designated or quasi-endowment ☐ %

b Permanent endowment ☐ %

c Term endowment ☐ %

The percentages on lines 2a, 2b, and 2c should equal 100%.

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

(i) Unrelated organizations

(ii) Related organizations

	Yes	No
3a(i)		
3a(ii)		
3b		

b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? ☐

4 Describe in Part XIII the intended uses of the organization's endowment funds.

**Part VI Land, Buildings, and Equipment.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings		312,763.	118,569.	194,194.
c Leasehold improvements		26,200.	6,841.	19,359.
d Equipment		376,982.	320,855.	56,127.
e Other				
<b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				269,680.

Schedule D (Form 990) 2020

**Part VII Investments - Other Securities.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives .....		
(2) Closely held equity interests .....		
(3) Other .....		
(A) .....		
(B) .....		
(C) .....		
(D) .....		
(E) .....		
(F) .....		
(G) .....		
(H) .....		
<b>Total.</b> (Col. (b) must equal Form 990, Part X, col. (B) line 12.) ▶		

**Part VIII Investments - Program Related.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) .....		
(2) .....		
(3) .....		
(4) .....		
(5) .....		
(6) .....		
(7) .....		
(8) .....		
(9) .....		
<b>Total.</b> (Col. (b) must equal Form 990, Part X, col. (B) line 13.) ▶		

**Part IX Other Assets.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1) .....	
(2) .....	
(3) .....	
(4) .....	
(5) .....	
(6) .....	
(7) .....	
(8) .....	
(9) .....	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 15.) ▶	

**Part X Other Liabilities.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes .....	
(2) .....	
(3) .....	
(4) .....	
(5) .....	
(6) .....	
(7) .....	
(8) .....	
(9) .....	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶	

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII ... ☐

Schedule D (Form 990) 2020

<b>Part XI</b>	<b>Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.</b>
----------------	--

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

<b>1</b>	Total revenue, gains, and other support per audited financial statements .....		<b>1</b>	
<b>2</b>	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
<b>a</b>	Net unrealized gains (losses) on investments .....	<b>2a</b>		
<b>b</b>	Donated services and use of facilities .....	<b>2b</b>		
<b>c</b>	Recoveries of prior year grants .....	<b>2c</b>		
<b>d</b>	Other (Describe in Part XIII.) .....	<b>2d</b>		
<b>e</b>	Add lines <b>2a</b> through <b>2d</b> .....		<b>2e</b>	
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b> .....		<b>3</b>	
<b>4</b>	Amounts included on Form 990, Part VIII, line 12, but not on line 1:			
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b .....	<b>4a</b>		
<b>b</b>	Other (Describe in Part XIII.) .....	<b>4b</b>		
<b>c</b>	Add lines <b>4a</b> and <b>4b</b> .....		<b>4c</b>	
<b>5</b>	Total revenue. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 12.) .....		<b>5</b>	

<b>Part XII</b>	<b>Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.</b>
-----------------	--

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

<b>1</b>	Total expenses and losses per audited financial statements .....		<b>1</b>	
<b>2</b>	Amounts included on line 1 but not on Form 990, Part IX, line 25:			
<b>a</b>	Donated services and use of facilities .....	<b>2a</b>		
<b>b</b>	Prior year adjustments .....	<b>2b</b>		
<b>c</b>	Other losses .....	<b>2c</b>		
<b>d</b>	Other (Describe in Part XIII.) .....	<b>2d</b>		
<b>e</b>	Add lines <b>2a</b> through <b>2d</b> .....		<b>2e</b>	
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b> .....		<b>3</b>	
<b>4</b>	Amounts included on Form 990, Part IX, line 25, but not on line 1:			
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b .....	<b>4a</b>		
<b>b</b>	Other (Describe in Part XIII.) .....	<b>4b</b>		
<b>c</b>	Add lines <b>4a</b> and <b>4b</b> .....		<b>4c</b>	
<b>5</b>	Total expenses. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 18.) .....		<b>5</b>	

**Part XIII Supplemental Information.**

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

[illegible]

**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 CHARTER SCHOOLS**

Employer identification number

**45-4768181**

**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:**

AS A PUBLIC CHARTER SCHOOL, THE CHARTER SCHOOL RECEIVES A PER ADA FEE FROM THE CALIFORNIA DEPARTMENT OF EDUCATION FOR EVERY PUPIL ATTENDING THE SCHOOL. ADDITIONALLY, CHARTER IS ELIGIBLE FOR LOCAL, STATE, FEDERAL PROGRAMS, AND CALIFORNIA LOTTERY FUNDS. DURING THE YEAR ENDED JUNE 30, 2021, THE SCHOOL RECEIVED PPP LOAN FORGIVENESS FROM THE US SMALL BUSINESS ADMINISTRATION.

**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 CHARTER SCHOOLS

Employer identification number

45-4768181

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

THE CHARTER SCHOOL IS A MEMBER OF A CHARTER MANAGEMENT ORGANIZATION - ILEAD  
SCHOOLS 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:

IN CONNECTION WITH ANY ACTUAL OR POSSIBLE CONFLICT OF INTEREST, AN  
INTERESTED PERSON MUST DISCLOSE THE EXISTENCE OF THE FINANCIAL INTEREST AND  
BE GIVEN THE OPPORTUNITY TO DISCLOSE ALL MATERIAL FACTS TO THE DIRECTORS  
AND MEMBERS OF COMMITTEES CONSIDERING THE PROPOSED TRANSACTION OR  
ARRANGEMENT. THE BOARD SHALL DECIDE IF A CONFLICT OF INTEREST EXISTS.

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

THE EXECUTIVE DIRECTOR'S PAY IS DETERMINED BASED ON DATA PROVIDED BY

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

Schedule O (Form 990 or 990-EZ) 2020



Name of the organization

ILEAD CHARTER SCHOOLS

Employer identification number

45-4768181

EXTERNAL CHARTER MANAGEMENT ORGANIZATIONS AND THROUGH COMPARISON STUDIES OF OTHER CHARTER SCHOOLS. THE BOARD MUST VOTE TO APPROVE THE EXECUTIVE DIRECTOR'S COMPENSATION AS A DIRECT ACTION. THE OFFICERS' AND KEY EMPLOYEES' PAY IS DETERMINE BASED ON DATA PROVIDED BY EXTERNAL CHARTER MANAGEMENT ORGANIZATIONS AND THROUGH COMPARISON STUDIES OF OTHER CHARTER SCHOOLS. THE BOARD MUST VOTE TO APPROVE THE OFFICERS' AND KEY EMPLOYEES' COMPENSATION AS A DIRECT ACTION.

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

THESE DOCUMENTS ARE AVAILABLE TO THE PUBLIC UPON REQUEST.

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

OTHER FEES FOR SERVICE:

PROGRAM SERVICE EXPENSES	755,940.
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MANAGEMENT AND GENERAL EXPENSES	1,625,083.
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FUNDRAISING EXPENSES	0.
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TOTAL EXPENSES	2,381,023.
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TOTAL OTHER FEES ON FORM 990, PART IX, LINE 11G, COL A	2,381,023.
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2020

# California Exempt Organization Annual Information Return

199

Calendar Year 2020 or fiscal year beginning (mm/dd/yyyy) <b>07/01/2020</b> , and ending (mm/dd/yyyy) <b>06/30/2021</b>	
Corporation/Organization name <b>ILEAD CHARTER SCHOOLS</b>	California corporation number <b>3411279</b>
Additional information. See instructions.	FEIN <b>45-4768181</b>
Street address (suite or room) <b>254 EAST AVENUE K-4</b>	PMB no.
City <b>LANCASTER</b>	State <b>CA</b> ZIP code <b>93535</b>
Foreign country name	Foreign province/state/county Foreign postal code

<b>A</b> First return ..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>B</b> Amended return ..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>C</b> IRC Section 4947(a)(1) trust ..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>D</b> Final information return? • <input type="checkbox"/> Dissolved <input type="checkbox"/> Surrendered (Withdrawn) <input type="checkbox"/> Merged/Reorganized Enter date: (mm/dd/yyyy) ..... <b>E</b> Check accounting method: (1) <input type="checkbox"/> Cash (2) <input checked="" type="checkbox"/> Accrual (3) <input type="checkbox"/> Other <b>F</b> Federal return filed? (1) • <input type="checkbox"/> 990T (2) • <input type="checkbox"/> 990PF (3) • <input type="checkbox"/> Sch H (990) (4) <input checked="" type="checkbox"/> Other 990 series <b>G</b> Is this a group filing? See instructions ..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>H</b> Is this organization in a group exemption ..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," what is the parent's name? .....	<b>I</b> Did the organization have any changes to its guidelines not reported to the FTB? See instructions ..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>J</b> If exempt under R&TC Section 23701d, has the organization engaged in political activities? See instructions. .... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>K</b> Is the organization exempt under R&TC Section 23701g? • <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," enter the gross receipts from nonmember sources \$ ..... <b>L</b> Is the organization a limited liability company? ..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>M</b> Did the organization file Form 100 or Form 109 to report taxable income? ..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>N</b> Is the organization under audit by the IRS or has the IRS audited in a prior year? ..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>O</b> Is federal Form 1023/1024 pending? ..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Date filed with IRS .....
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**Part I Complete Part I unless not required to file this form. See General Information B and C.**

<b>Receipts and Revenues</b>	1 Gross sales or receipts from other sources. From Side 2, Part II, line 8 .....	1	3,524	00
	2 Gross dues and assessments from members and affiliates .....	2		00
	3 Gross contributions, gifts, grants, and similar amounts received .....	3	10,476,094	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 .....	4	10,479,618	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 .....	7		00
	8 Total gross income. Subtract line 7 from line 4 .....	8	10,479,618	00
<b>Expenses</b>	9 Total expenses and disbursements. From Side 2, Part II, line 18 .....	9	9,515,794	00
	10 Excess of receipts over expenses and disbursements. Subtract line 9 from line 8 .....	10	963,824	00
<b>Filing Fee</b>	11 Total payments .....	11		00
	12 Use tax. See General Information K .....	12		00
	13 Payments balance. If line 11 is more than line 12, subtract line 12 from line 11 .....	13		00
	14 Use tax balance. If line 12 is more than line 11, subtract line 11 from line 12 .....	14		00
	15 Penalties and Interest. See General Information J .....	15		00
	16 <b>Balance due.</b> Add line 12 and line 15. Then subtract line 11 from the result .....	16		00
<b>Sign Here</b>	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>661-722-4287</b>
<b>Paid Preparer's Use Only</b>	Preparer's signature <b>WADE MCMULLEN</b>	Date <b>05/11/22</b>	Check if self-employed <input type="checkbox"/>	• PTIN <b>P00541671</b>
	Firm's name (or yours, if self-employed) and address <b>CLIFTONLARSONALLEN LLP 2210 EAST ROUTE 66 GLEN DORA, CA 91740</b>			• 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	•	7	3,524	00
	8	<b>Total</b> gross sales or receipts from other sources. Add line 1 through line 7. Enter here and on Side 1, Part I, line 1	•	8	3,524	00
	9	Contributions, gifts, grants, and similar amounts paid	•	9		00
	10	Disbursements to or for members	•	10		00
	11	Compensation of officers, directors, and trustees	•	11	136,782	00
	12	Other salaries and wages	•	12	3,625,436	00
	13	Interest	•	13		00
	14	Taxes	•	14	116,201	00
	15	Rents	•	15	1,119,887	00
	16	Depreciation and depletion (See instructions)	•	16	52,034	00
	17	Other expenses and disbursements	•	17	4,465,454	00
	18	<b>Total</b> expenses and disbursements. Add line 9 through line 17. Enter here and on Side 1, Part I, line 9	•	18	9,515,794	00

**Schedule L Balance Sheet**

		Beginning of taxable year		End of taxable year	
Assets		(a)	(b)	(c)	(d)
1 Cash			2,830,487	•	4,240,526
2 Net accounts receivable			967,310	•	3,206,213
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		715,945		715,945	
b Less accumulated depreciation		( 394,231 )	321,714	( 446,265 )	269,680
11 Land				•	
12 Other assets	STMT 4		65,851	•	
13 <b>Total assets</b>			4,185,362		7,716,419
<b>Liabilities and net worth</b>					
14 Accounts payable			372,561	•	1,769,910
15 Contributions, gifts, or grants payable				•	
16 Bonds and notes payable				•	
17 Mortgages payable				•	5,553
18 Other liabilities	STMT 5		967,467		2,131,798
19 Capital stock or principal fund				•	
20 Paid-in or capital surplus. Attach reconciliation				•	
21 Retained earnings or income fund			2,845,334	•	3,809,158
22 <b>Total liabilities and net worth</b>			4,185,362		7,716,419

**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	•	963,824	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		963,824
6 Total. Add line 1 through line 5		963,824			

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CA 199	OTHER INCOME	STATEMENT 1
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DESCRIPTION	AMOUNT
OTHER REVENUE	3,524.
TOTAL TO FORM 199, PART II, LINE 7	3,524.

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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
NYKOLE KENT 254 EAST AVENUE K-4 LANCASTER, CA 93535	DIRECTOR 40.00	136,782.
LATORRA SAXTON 254 EAST AVENUE K-4 LANCASTER, CA 93535	PRESIDENT 2.00	0.
BETH CARR-KNUDSON 254 EAST AVENUE K-4 LANCASTER, CA 93535	TREASURER 2.00	0.
LEE SMITH 254 EAST AVENUE K-4 LANCASTER, CA 93535	SECRETARY 2.00	0.
TOTAL TO FORM 199, PART II, LINE 11		136,782.

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CA 199	OTHER EXPENSES	STATEMENT 3
DESCRIPTION		AMOUNT
INSTRUCTIONAL MATERIALS		518,496.
OPERATING EXPENSE		152,090.
PENSION PLAN CONTRIBUTIONS		393,025.
OTHER EMPLOYEE BENEFITS		447,275.
LEGAL FEES		125,398.
ACCOUNTING FEES		12,261.
OTHER PROFESSIONAL FEES		2,381,023.
ADVERTISING AND PROMOTION		4,280.
OFFICE EXPENSES		11,850.
INFORMATION TECHNOLOGY		293,921.
TRAVEL		1,308.
CONFERENCES AND CONVENTIONS		26,709.
INSURANCE		97,818.
TOTAL TO FORM 199, PART II, LINE 17		4,465,454.

CA 199	OTHER ASSETS	STATEMENT 4
DESCRIPTION	BEG. OF YEAR	END OF YEAR
PREPAID EXPENSES AND DEFERRED CHARGES	65,851.	0.
TOTAL TO FORM 199, SCHEDULE L, LINE 12	65,851.	0.

CA 199	OTHER LIABILITIES	STATEMENT 5
DESCRIPTION	BEG. OF YEAR	END OF YEAR
DEFERRED REVENUE	0.	478,581.
UNSECURED NOTES AND LOANS PAYABLE	967,467.	1,653,217.
TOTAL TO FORM 199, SCHEDULE L, LINE 18	967,467.	2,131,798.

CA 199	FUND BALANCES	STATEMENT 6
DESCRIPTION	BEG. OF YEAR	END OF YEAR
NET ASSETS WITHOUT DONOR RESTRICTIONS	2,845,334.	3,809,158.
TOTAL TO FORM 199, SCHEDULE L, LINE 21	2,845,334.	3,809,158.

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

Exempt Organization name

Identifying number

**ILEAD CHARTER SCHOOLS****45-4768181****Part I Electronic Return Information** (whole dollars only)

<b>1</b>	Total gross receipts (Form 199, line 4)	<b>1</b>	<u>10,479,618</u>
<b>2</b>	Total gross income (Form 199, line 8)	<b>2</b>	<u>10,479,618</u>
<b>3</b>	Total expenses and disbursements (Form 199, line 9)	<b>3</b>	<u>9,515,794</u>

**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 Lancaster  
254 E. Avenue K-4  
Lancaster, CA 93535

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 Lancaster ("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 Lancaster.

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

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

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

To: iLEAD Lancaster 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 Lancaster participates in the Maker Learning Network Insurance Programs, which includes Risk Management and Insurance Policy Procurement and oversight.

<b>ILEAD Lancaster</b>	<b>Premium Indications</b>
General Liability	\$9,454.40
Excess Liability	\$8,455.21
Educators Legal Liability	\$15,200.53
Excess Educators Legal	\$3,453.13
Cyber	\$3,035.51
Crime	\$256.39
Student Accident	\$2,344.53
Property	\$66,610.62
<b>Total Allocated</b>	<b>\$108,810.31</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 Lancaster 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: \_\_\_\_\_

iLEAD Lancaster  
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 Lancaster;
2. In compliance with Article XIII, Section 36(e), with the California Constitution, the governing board of the iLEAD Lancaster has determined to spend the monies received from the Education Protection Act as attached.

Dated: \_\_\_\_\_

\_\_\_\_\_  
Board Member

\_\_\_\_\_  
Board Member

\_\_\_\_\_  
Board Member

\_\_\_\_\_  
Board Member



iLEAD Lancaster  
254 E. Ave K-4  
Lancaster,  
CA93535

Education Protection Account Budget Object Codes: 2022/2023 (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
EPA Estimated Funding Determination for 2022/2023		\$1,648,438



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

**Charter School Certification**

Charter School Name:	iLEAD Lancaster
CDS #:	19 64667 0125559
Charter Approving Entity:	Acton-Agua Dulce Unified School Dsitric
County:	Los Angeles
Charter #:	1376

For information regarding this report, please contact:

For Approving Entity:

Name \_\_\_\_\_  
Title \_\_\_\_\_  
Telephone \_\_\_\_\_  
E-mail address \_\_\_\_\_

For Charter School:

iLEAD Lancaster  
Name \_\_\_\_\_  
Nykole Kent  
Title \_\_\_\_\_  
Director  
Telephone \_\_\_\_\_  
661-722-4287  
E-mail address \_\_\_\_\_  
nykole.kent@ileadlancaster.org

To the entity that approved the charter school:

  x   ) 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

  x   ) 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:

  x   ) 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 Lancaster  
CDS #: 19 64667 0125559  
Charter Approving Entity: Acton-Aqua Dulce Unified School District  
County: Los Angeles  
Charter #: 1376

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	4,624,559	5,492,829		5,492,829	868,270
Education Protection Account - Current Year	8012	1,648,438	1,774,574		1,774,574	126,136
State Aid - Prior Years	8019	0	0		0	0
Transfer of Charter Schools in Lieu of Property Taxes	8096	737,902	794,365		794,365	56,463
Other LCFF Transfers	8091, 8097	0	0		0	0
<b>Total, LCFF Sources</b>		<b>7,010,899</b>	<b>8,061,768</b>		<b>8,061,768</b>	<b>1,050,869</b>
2. Federal Revenues (see NOTE on last page)						
No Child Left Behind	8290	0		0	0	0
Special Education - Federal	8181, 8182	111,130		86,000	86,000	(25,130)
Child Nutrition - Federal	8220	154,000		154,000	154,000	0
Other Federal Revenues	8290	251,460		2,266,460	2,266,460	2,015,000
<b>Total, Federal Revenues</b>		<b>516,590</b>	<b>0</b>	<b>2,506,460</b>	<b>2,506,460</b>	<b>1,989,870</b>
3. Other State Revenues						
Special Education - State	StateRevSE	502,567		633,794	633,794	131,227
Child Nutrition Programs	8520	9,768		9,768	9,768	0
Mandated Costs Reimbursements	8550	12,615	12,908		12,908	293
Lottery - Unrestricted and Instructional Materials	8560	137,267	107,512	52,954	160,466	23,199
Low Performing Student Block Grant	8590	746,759		0	0	(746,759)
All Other State Revenues	StateRevAO	583,945	809,359	583,945	1,393,304	809,359
<b>Total, Other State Revenues</b>		<b>1,992,921</b>	<b>929,779</b>	<b>1,280,461</b>	<b>2,210,240</b>	<b>217,319</b>
4. Other Local Revenues						

Transfers from Sponsoring LEAs to Charter Schools	8791	0	0		0	0
All Other Local Revenues	LocalRevAO	36,802	0	0	0	(36,802)
<b>Total, Local Revenues</b>		<b>36,802</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>(36,802)</b>
<b>5. TOTAL REVENUES</b>		<b>9,557,212</b>	<b>8,991,547</b>	<b>3,786,921</b>	<b>12,778,468</b>	<b>3,221,256</b>
<b>B. EXPENDITURES</b>						
<b>1. Certificated Salaries</b>						
Teachers' Salaries	1100	2,525,713	224,358	2,521,690	2,746,048	220,335
Certificated Pupil Support Salaries	1200	68,491	170,750	43,726	214,476	145,985
Certificated Supervisors' and Administrators' Salaries	1300	188,144	239,847	0	239,847	51,703
Other Certificated Salaries	1900	31,188	0	0	0	(31,188)
<b>Total, Certificated Salaries</b>		<b>2,813,536</b>	<b>634,955</b>	<b>2,565,416</b>	<b>3,200,371</b>	<b>386,835</b>
<b>2. Non-certificated Salaries</b>						
Instructional Aides' Salaries	2100	406,378	433,337	313,167	746,504	340,126
Non-certificated Support Salaries	2200	135,374	0	214,890	214,890	79,516
Non-certificated Supervisors' and Administrators' Sal.	2300	0	0	0	0	0
Clerical and Office Salaries	2400	260,943	120,893	125,587	246,480	(14,463)
Other Non-certificated Salaries	2900	314,824	333,591	100,000	433,591	118,767
<b>Total, Non-certificated Salaries</b>		<b>1,117,519</b>	<b>887,821</b>	<b>753,644</b>	<b>1,641,465</b>	<b>523,946</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)
<b>3. Employee Benefits</b>						
STRS	3101-3102	430,713	460,220	151,051	611,271	180,558
PERS	3201-3202	0	0	0	0	0
OASDI / Medicare / Alternative	3301-3302	138,596	132,106	35,166	167,272	28,676
Health and Welfare Benefits	3401-3402	346,176	402,405	5,160	407,565	61,389
Unemployment Insurance	3501-3502	31,020	25,605	0	25,605	(5,415)
Workers' Compensation Insurance	3601-3602	0	0	0	0	0
Retiree Benefits	3701-3702	0	0	0	0	0
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>946,505</b>	<b>1,020,336</b>	<b>191,377</b>	<b>1,211,713</b>	<b>265,208</b>
<b>4. Books and Supplies</b>						
Approved Textbooks and Core Curricula Materials	4100	135,210	65,116	6,429	71,545	(63,665)
Books and Other Reference Materials	4200		0	1,000	1,000	1,000
Materials and Supplies	4300	387,427	296,515	292,878	589,393	201,966
Noncapitalized Equipment	4400	257,875	40,000	540,754	580,754	322,879
Food	4700	122,027	335	163,940	164,275	42,248
<b>Total, Books and Supplies</b>		<b>902,539</b>	<b>401,966</b>	<b>1,005,001</b>	<b>1,406,967</b>	<b>504,428</b>

5. Services and Other Operating Expenditures						
Subagreements for Services	5100	0	0	0	0	0
Travel and Conferences	5200	71,146	97,199	117,801	215,000	143,854
Dues and Memberships	5300	39,107	92,819	0	92,819	53,712
Insurance	5400	60,511	65,325	0	65,325	4,814
Operations and Housekeeping Services	5500	123,904	124,963	0	124,963	1,059
Rentals, Leases, Repairs, and Noncap. Improvements	5600	989,963	936,087	0	936,087	(53,876)
Professional/Consulting Services and Operating Expend.	5800	2,131,478	2,496,177	762,647	3,258,824	1,127,346
Communications	5900	35,857	38,754	0	38,754	2,897
<b>Total, Services and Other Operating Expenditures</b>		<b>3,451,966</b>	<b>3,851,324</b>	<b>880,448</b>	<b>4,731,772</b>	<b>1,279,806</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>9,232,065</b>	<b>6,796,402</b>	<b>5,395,886</b>	<b>12,192,288</b>	<b>2,960,223</b>
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPEND. BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)		325,147	2,195,145	(1,608,965)	586,180	
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	0	0	0	0
4. TOTAL OTHER FINANCING SOURCES / USES		0	0	0	0	0
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)		325,147	2,195,145	(1,608,965)	586,180	0
F. FUND BALANCE, RESERVES						
1. Beginning Fund Balance						
a. As of July 1	9791	3,544,987	3,870,134		3,870,134	325,147
b. Adjustments/Restatements to Beginning Balance	9793, 9795	0			0	0
c. Adjusted Beginning Balance		3,544,987	3,870,134	0	3,870,134	
2. Ending Fund Balance, Oct 31 (E + F.1.c.)		3,870,134	6,065,279	(1,608,965)	4,456,314	586,180
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	3,408,531	5,455,665	(1,608,965)	3,846,700	
Legally Restricted Balance	9740	0		0	0	
Designated for Economic Uncertainties	9770	461,603	609,614		609,614	
Other Designations	9775, 9780	0	0	0	0	
Net Investment in Capital Assests (Accrual Basis Only)	9796	0	0	0	0	
Undesignated / Unappropriated Amount	9790	0	0	0	0	586,180

# CHARTER SCHOOL MULTI-YEAR PROJECTION - ALTERNATIVE FORM

Charter School Name: iLEAD Lancaster  
 CDS #: 19 64667 0125559  
 Charter Approving Entity: Acton-Agua Dulce Unified School District  
 County: Los Angeles  
 Charter #: 1376  
 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	5,492,829		5,492,829	5,880,752
Education Protection Account - Current Year	8012	1,774,574		1,774,574	1,782,136
State Aid - Prior Years	8019	0		0	
Transfer of Charter Schools in Lieu of Property Taxes	8096	794,365		794,365	797,750
Other LCFF Transfers	8091, 8097	0		0	0
<b>Total, LCFF Sources</b>		<b>8,061,768</b>		<b>8,061,768</b>	<b>8,460,638</b>
2. Federal Revenues					
No Child Left Behind	8290		0	0	0
Special Education - Federal	8181, 8182		86,000	86,000	87,975
Child Nutrition - Federal	8220		154,000	154,000	157,080
Other Federal Revenues	8290	0	2,266,460	2,266,460	259,004
<b>Total, Federal Revenues</b>		<b>0</b>	<b>2,506,460</b>	<b>2,506,460</b>	<b>504,059</b>
3. Other State Revenues					
Special Education - State	StateRevSE		633,794	633,794	634,145
Child Nutrition Programs	8520		9,768	9,768	9,963
Mandated Costs Reimbursements	8550	12,908		12,908	13,666
Lottery - Unrestricted and Instructional Materials	8560	107,512	52,954	160,466	161,194
Low Performing Student Block Grant	8590	0	0	0	0
All Other State Revenues	StateRevAO	809,359	583,945	1,393,304	1,428,136
<b>Total, Other State Revenues</b>		<b>929,779</b>	<b>1,280,461</b>	<b>2,210,240</b>	<b>2,247,104</b>
4. Other Local Revenues					
Transfers from Sponsoring LEAs to Charter Schools	8791	0		0	0
All Other Local Revenues	LocalRevAO	0	0	0	0
<b>Total, Local Revenues</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>



<b>5. TOTAL REVENUES</b>		<b>8,991,547</b>	<b>3,786,921</b>	<b>12,778,468</b>	<b>11,211,801</b>	<b>11,741,322</b>
<b>B. EXPENDITURES</b>						
<b>1. Certificated Salaries</b>						
Teachers' Salaries	1100	224,358	2,521,690	2,746,048	2,800,969	2,856,988
Certificated Pupil Support Salaries	1200	170,750	43,726	214,476	218,766	223,141
Certificated Supervisors' and Administrators' Salaries	1300	239,847	0	239,847	244,644	249,537
Other Certificated Salaries	1900	0	0	0	0	0
<b>Total, Certificated Salaries</b>		<b>634,955</b>	<b>2,565,416</b>	<b>3,200,371</b>	<b>3,264,378</b>	<b>3,329,666</b>
<b>2. Non-certificated Salaries</b>						
Instructional Aides' Salaries	2100	433,337	313,167	746,504	761,434	776,663
Non-certificated Support Salaries	2200	0	214,890	214,890	219,188	223,572
Non-certificated Supervisors' and Administrators' Sal.	2300	0	0	0	0	0
Clerical and Office Salaries	2400	120,893	125,587	246,480	251,410	256,438
Other Non-certificated Salaries	2900	333,591	100,000	433,591	442,263	451,108
<b>Total, Non-certificated Salaries</b>		<b>887,821</b>	<b>753,644</b>	<b>1,641,465</b>	<b>1,674,294</b>	<b>1,707,780</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	460,220	151,051	611,271	623,496	635,966
PERS	3201-3202	0	0	0	0	0
OASDI / Medicare / Alternative	3301-3302	132,106	35,166	167,272	170,617	174,030
Health and Welfare Benefits	3401-3402	402,405	5,160	407,565	415,716	424,031
Unemployment Insurance	3501-3502	25,605	0	25,605	26,117	26,639
Workers' Compensation Insurance	3601-3602	0	0	0	0	0
Retiree Benefits	3701-3702	0	0	0	0	0
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>1,020,336</b>	<b>191,377</b>	<b>1,211,713</b>	<b>1,235,947</b>	<b>1,260,666</b>
<b>4. Books and Supplies</b>						
Approved Textbooks and Core Curricula Materials	4100	65,116	6,429	71,545	72,976	74,435
Books and Other Reference Materials	4200	0	1,000	1,000		
Materials and Supplies	4300	296,515	292,878	589,393	175,000	178,500
Noncapitalized Equipment	4400	40,000	540,754	580,754	220,000	224,400
Food	4700	335	163,940	164,275	167,561	170,912
<b>Total, Books and Supplies</b>		<b>401,966</b>	<b>1,005,001</b>	<b>1,406,967</b>	<b>635,536</b>	<b>648,247</b>
<b>5. Services and Other Operating Expenditures</b>						
Subagreements for Services	5100	0	0	0	0	0
Travel and Conferences	5200	97,199	117,801	215,000	219,300	223,686

Dues and Memberships	5300	92,819	0	92,819	94,675	96,569
Insurance	5400	65,325	0	65,325	66,632	67,964
Operations and Housekeeping Services	5500	124,963	0	124,963	127,462	130,012
Rentals, Leases, Repairs, and Noncap. Improvements	5600	936,087	0	936,087	954,809	973,905
Professional/Consulting Services and Operating Expend.	5800	2,496,177	762,647	3,258,824	2,574,000	2,625,480
Communications	5900	38,754	0	38,754	39,529	40,320
<b>Total, Services and Other Operating Expenditures</b>		<b>3,851,324</b>	<b>880,448</b>	<b>4,731,772</b>	<b>4,076,407</b>	<b>4,157,936</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>6,796,402</b>	<b>5,395,886</b>	<b>12,192,288</b>	<b>10,886,564</b>	<b>11,104,295</b>
<b>C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPEND. BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)</b>		<b>2,195,145</b>	<b>(1,608,965)</b>	<b>586,180</b>	<b>325,237</b>	<b>637,026</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	0	0	0	0	0

<b>4. TOTAL OTHER FINANCING SOURCES / USES</b>		0	0	0	0	0
<b>E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)</b>		2,195,145	(1,608,965)	586,180	325,237	637,026
<b>F. FUND BALANCE, RESERVES</b>						
1. Beginning Fund Balance		0	0			
a. As of July 1	9791	3,870,134	0	3,870,134	4,456,314	4,781,551
b. Adjustments/Restatements to Beginning Balance	9793, 9795	0	0	0	0	0
c. Adjusted Beginning Balance		3,870,134	0	3,870,134	4,456,314	4,781,551
<b>2. Ending Fund Balance, Oct 31 (E + F.1.c.)</b>		<b>6,065,279</b>	<b>(1,608,965)</b>	<b>4,456,314</b>	<b>4,781,551</b>	<b>5,418,578</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	5,455,665	(1,608,965)	3,846,700	1,637,810	0
Legally Restricted Balance	9740		0	0	0	0
Designated for Economic Uncertainties	9770	609,614		609,614	621,755	634,190
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	2,521,986	4,784,388



## iLEAD Lancaster

### *Employee BYOD Cell Phone Policy*

#### *Board Approved:*

iLEAD Lancaster extends its employees the privilege of using smartphone and tablets of their choosing at work for their convenience. iLEAD Lancaster reserves the right to revoke this privilege if users do not follow BYOD agreement outlined below as well as the School Communication and Technology Use Policy outlined in the Employee Guidebook. Additionally, employees whose job duties require them to use a cell phone for business purposes are eligible for a monthly reimbursement. This agreement is intended to outline the terms of the monthly reimbursement and to protect the security and integrity of iLEAD Lancaster data and technology infrastructure.

- 1. Policy:** Employees whose job duties include the need for cell phone will receive a reimbursement to cover business-related costs associated with using their personal cell phone.
  - a. iLEAD Lancaster will not provide a reimbursement of an amount greater than the employee's current service plan.
  - b. The cell phone service is personally owned and may be 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. Employees who are able to use such alternative means for all communications necessitated by their job duties, and therefore do not need to use their cell phones for work purposes, are not eligible to receive the cell phone reimbursement.
- 2. Cell Phone Reimbursement:**
  - a. **Eligibility:** Employees eligible for a cell phone reimbursement generally include department heads, supervisors, and full-time employees whose job duties regularly require emergency call back, irregular work hours or other job-related factors that require the employee to utilize a cell phone to perform their job duties. If any employee not otherwise eligible for cell phone reimbursement under this policy believes that he or she believes that he or she needs to use a personal cell phone to conduct iLEAD Lancaster business,

the employee should contact his or her department head immediately to discuss whether he or she qualifies for a reimbursement.

- b. Reimbursement Amount: The standard monthly cell phone reimbursement amount shall be as follows for all iLEAD Lancaster Employees unless job classification, work location, and duties do not require employee-provided cell phone reimbursement or reimbursement at different rate.

**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. Reimbursement Payment: The approved cell phone reimbursement will be included in the employee's paycheck as a monthly stipend, provided the employee attests to the amount being less than the cost of their cell phone service. The reimbursement 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 reimbursed for work related usage of their personal cell phones are encouraged to consult with their department head, and should be prepared to submit their detailed cell phone bill indicating which charges and calls are business-related for reimbursement of actual charges that exceed the reimbursement amount.

### **3. Department Supervisor Responsibilities:**

- a. Determine if reimbursements should be changed, continued, discontinued, or if an additional amount is needed;
- b. Notify Employee Services if the employee no longer requires a benefit due to responsibility changes or termination.

### **4. Employee Responsibilities:**

- 1. Any employee who receives a cell phone reimbursement must provide their department head and the School's 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 reimbursement must maintain an active cell phone contract for the life of the reimbursement.
- 4. iLEAD Lancaster will not be responsible for any fees associated with any change or cancellation of the employee's cell phone plan. For example, if an employee resigns, and no longer wants to retain the current cell phone contract for

- personal purposes, any cancellation charges will be the employee's responsibility.
5. Employee acknowledges iLEAD Lancaster Employment Guidebook- the phone numbers of employees who receive the cell phone reimbursement will be added to the iLEAD Lancaster email signature line, business cards, published in an internal iLEAD Lancaster 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 Members are not eligible for a cell phone reimbursement, and should submit requests for reimbursement for any properly reimbursable expenses pursuant to the procedures outlined in their individual contracts with iLEAD Lancaster.

## **6. Acceptable Use of Company-Owned Devices and Electronic Resources:**

- a. iLEAD Lancaster defines acceptable business use as activities that directly or indirectly support the business of iLEAD Lancaster.
- b. Employees may be blocked from accessing certain websites during work hours/ while connected to the corporate network at the discretion of iLEAD Lancaster.
- c. Devices may not be used at any time to:
  - Store or transmit illicit (i.e. pornographic, obscene or sexually explicit) materials.
  - In any manner illegal (i.e. contrary to local state, or federal laws)
  - In any way that is harassing or offensive on the basis of any protected category, abusive, or threatening, defamatory, or intentionally damaging or violating the privacy of information of others.
  - Employees may use their mobile device to access the following company- owned resources: email, calendars, contracts, documents, etc.
  - Employees do not have any expectation of personal privacy in any matters stored in, created, received, or sent using company-owned devices or electronic resources.
  - iLEAD Lancaster 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. Connectivity issues are not supported by the iLEAD Lancaster IT Department; employees should contact the device manufacturer or their carrier for operating system or hardware-related issues.

## **8. Security**

- a. It is strongly encouraged that employees install "Find My Phone" application or another loss prevention application in case of loss or theft. It is the responsibility of the employee to change passwords on all iLEAD

Lancaster Schools 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 Lancaster Schools is to be removed from device.



# iLEAD Lancaster

## Employee Guidebook

Board Approved ~~June 24, 2021~~ [insert date]



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## INTRODUCTION

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Welcome to iLEAD Lancaster!

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 School Director or Employee Services.

The information contained in this Guidebook applies to all employees at iLEAD Lancaster (“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 the Administration. 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

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### 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 and 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 School 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

---

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-school trip, business-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 Complaint 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 School Director, submit the complaint directly to 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 the Administration or 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 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.

## 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 net 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 ~~the~~ 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~~LEAD 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 School Director. It is recommended that any such gifts be filtered through the School 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 School 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. 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 ABUSE OR NEGLECT ~~AND ABUSE~~ REPORTING

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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. ~~The reporter should not contact the child's parents. There is no duty for the reporter to 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, ~~the~~ iLEAD School 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 ~~ALCOHOL~~ ALCOHOL 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 or~~ the employee or 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 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 using ~~his/her~~ iLEAD's ~~issued equipment~~ Communications Systems. It is strictly prohibited to use ~~another employee's any 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 ~~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 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~~Sschool-related confidential communications. This prohibition applies both during and after your employment with iLEAD.
- Do not post confidential information (as defined in this ~~Handbook~~ Guidebook) 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 affiliating 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 the Administration 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 the Administration.

Current and former employees, or employee representatives, may also request inspection through the use of an iLEAD-provided request form. Please contact the Administration 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 the Administration.

### 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:

Length of Workday in Hours	# of Meal Periods	Explanation
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0 to ≤ 5	0	An employee who works 5 hours or less in a workday is not entitled to a meal period.
> 5 to ≤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:

Which Meal Period	When
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 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:

<b>Length of Work Period in Hours</b>	<b># of Rest Periods</b>	<b>Explanation</b>
0 to < 3.5	0	An employee whose work period is less than 3.5 hours is not entitled to a rest period.
$\geq 3.5$ to $\leq 6$	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 $\leq 10$	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 $\leq 14$	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 the Administration 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 Administration 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 the Administration or Employee Services. iLEAD will respond accordingly, generally within two business days.

If any employee believes that ~~he or she has~~they 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 a predetermined salary, hourly basis, etc.) will have paydays scheduled

on the 5<sup>th</sup> and 20<sup>th</sup> of each month (see Administration 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 the Administration to the extent possible. If it is not possible to arrange your absence or tardiness in advance, you must notify the Administration 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

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As a commitment to our team's professional growth, iLEAD holds minimum days on Fridays to allow for professional development, collaboration opportunities and meetings. All full-time salaried staff, including teachers, ~~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 development opportunities will be offered throughout the year. Teaching staff ~~is-are~~ required to attend all professional development opportunities prior to the start of the school year. Teaching staff ~~is-are~~ encouraged to visit other charter schools (as appropriate), attend applicable conferences, and conduct a research activity/presentation and other approved professional 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~~  
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 the Administration. Purchase Orders 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 18 days (or 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:* 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 18 days (or 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 the Administration.

### 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 Administration. 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.

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## 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 the Administration as far in advance as possible. To open the lines of communication, while on leave, we ask employees to keep in contact with the Administration and notify the Administration if the date to return to work changes. If an employee's leave expires and the employee fails to return to work without contacting the Administration, 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 the Administration 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 the Administration. 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. ~~f~~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 with a “serious health condition”;
3. (CFRA ONLY) the care of the employee’s parent-in-law, grandparent, grandchild, sibling or registered domestic partner with a “serious health condition”;
4. the “serious health condition” of the employee;
5. (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
6. 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 paragraphs (2) and (3) above only if due to a serious health condition, your spouse, child, parent, parent-in-law, grandparent, grandchild, sibling, or registered domestic partner 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 (34) 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 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 Administration. 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 the Administration.

## 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 the Administration. 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 the Administration 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. 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:

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 of or to a position~~ with equivalent seniority 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 ~~is it~~ has been presented to you, that you have discussed it with the Administration,

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 the Administration. 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 the Administration. 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-me~~ 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]

## ATTACHMENT A

### MAKER SERVICES:

#### TIER 1 Curriculum, Instruction and ~~Assessment~~ Engagement

- ~~Training, coaching and support in the iLEAD model of Project Based Learning (PBL) with a focus on PBL culture, the iLEAD Design Guide for planning, assessments, best practices, academic rigor and the integration of state and organizational learner outcomes (standards, 7 Habits, iLEAD Learner Outcomes.)~~ Duplicative so removed and fine tuned below
- Provide professional learning to support full implementation of the iLEAD instructional model as identified in the iLEAD Design Element Alignment Lens (iDEAL).
- Coaching and support with the planning and execution of Project Based Learning/Problem Based Learning individual projects, by including building individual and team capacity, project ideas, project tune ups (tuning, Critical Friends protocols), and guidance through specific organization-wide projects such as *Dream Up to Space*, *Soaring Aeronautics*, *The Personal Project*, *Mini PCR*, *Math Identity Project*, etc.
- Provide monthly new facilitator onboarding
- Curriculum training, coaching and support of specific content-based programs focusing on rigorous TK-12 literacy, math, science, humanities/social studies, and STEAM (Science, Technology, Engineering, Arts, and Math) programs, which includes implementing all elements of the iLEAD model.
- Training, coaching and support of school leaders, classroom staff, and other staff in the development of a positive and supportive school culture, including but not limited to the ~~iLEAD Design Element Alignment Lens~~ through the iDEAL process.
- Training, coaching and support with school-wide self-study and program assessments, using the ~~iLEAD Design Element Alignment Lens (iDEAL)~~ iDEAL process for optimization and goal-setting purposes.
- Training, coaching and support of iLEAD's iRESPECT model of classroom management and climate, including 7 Habits, Love and Logic, and ~~iRESPECT~~ Restorative Practices.
- Professional learning is provided on-site and remotely, to support full implementation of the iLEAD instructional model with fidelity as defined in iDEAL.
- ~~Implementation and support for a variety of regular formative benchmark assessments in core subject areas such as NWEA MAP testing, writing literacy as well as any summative State.~~ Duplicative, listed below in Measuring Effectiveness
- ~~Training, coaching and support in the area of data analysis and assessments, utilizing the iLEAD data protocol.~~ Moved to Measuring Effectiveness section
- ~~Development, implementation, and sustainability of monthly data protocols with the key focus on utilization of the collected data in order to inform and aid in the improvement of the instructional program as well as individual learner achievement.~~ Moved to Measuring Effectiveness section



- ~~• Coordination for participation in the GALLUP poll and employee badging system.~~  
Moved to Measuring Effectiveness section with new wording
- ~~• Access to *Being Makers* website education resources and PBL project bank.~~ Moved to Measuring Effectiveness section
- Support family engagement through providing training to families to better understand aspects of iLEAD's educational model. Moved here from Extra Curricular and School Support

#### ~~PROGRAM ASSESSMENT~~ **MEASURING EFFECTIVENESS** New title and section moved up to be with Makers

- Implementation and support for a variety of regular formative benchmark assessments in core subject areas such as NWEA MAP testing, writing, and literacy, as well as any summative state-mandated assessments.
- Development, implementation and sustainability of ~~monthly data protocols~~ regularly scheduled data meetings with the key focus on utilization of the collected data in order to inform and set goals to aid in the improvement of the instructional program as well as individual learner achievement.
- Training, coaching and support in the area of data analysis and assessments, ~~utilizing the iLEAD data protocol.~~
- ~~• Development, implementation, and sustainability of monthly data protocols with the key focus on utilization of the collected data in order to inform and aid in the improvement of the instructional program as well as individual learner achievement.~~ Duplicative so removed
- Collaboration with educational partners in the self-evaluation of the iLEAD instructional model implementation with fidelity. Documenting and reporting of the model implementation for the school board and authorizing agency.
- ~~• Coordination of participation in the GALLUP poll and the employee badging system for professional learning opportunities.~~
- Design, coordinate, and collect survey data to improve practices
- Access to the *Being Makers* website education resources, iLEAD Science and Aerospace Projects website, Mathemagical Mindsets website, Brightspace educational resources, and PBL project bank.

#### ~~OTHER EDUCATIONAL SUPPORT SERVICES~~ **ADDITIONAL LEARNER SUPPORT SERVICES:**

- Training, coaching and support, and assistance with monitoring and assistance operating programs and compliance for English Learners.
- Training, coaching, and assistance with monitoring programs and compliance for Foster and Homeless Youth.
- Training, coaching and support, and assistance with monitoring Student Support programs programs and compliance of programs that provide additional learner support.



Key:  
Purple: change noted  
Blue: new  
Black strikethrough: removed

- Representation at required SELPA meetings (such as CEO Council, Executive Council, PLC, etc.)
- Assist<sup>ance</sup> with SELPA communications
- Assistance through due process and mediation when necessary, including communications with legal counsel.
- ~~Assist with monitoring data and fixing errors in SEIS (Special Education Information System) to ensure data is uploaded correctly into state system~~ In <sup>iCA SPED Agreement</sup>
- Support and training to promote equity, diversity <sup>and inclusion amongst learners, staff and other educational partners.</sup>
- Develop <sup>and/or assist with implementing</sup> Multi-Tiered Systems of Support (MTSS)
- ~~Support with Upper School programs may include UC A-G approval process and annual updating, agreements with Community Colleges and Universities, IB accreditation support, NCAA accreditation, WIOA/Job Corp partnerships, CTE pathway development, and academic counselor collabs.~~ <sup>Moved to Special Program section below</sup>
- ~~Support WASC accreditation and renewal~~ <sup>Moved to Compliance and Reporting section below</sup>
- ~~Support with charter approval and renewal~~ <sup>Duplicative of service in School, Community and Authorizer Relations around renewal work</sup>

#### **SPECIAL PROGRAMS:** <sup>New section</sup>

- ~~Support with Upper School programs may include UC A-G approval process and annual updating, agreements with Community College and Universities, IB accreditation support, NCAA accreditation, WIOA/Job Corp partnerships, CTE pathway development, and academic counselor collabs.~~ <sup>Reworked below</sup>
- Support with Upper School programs, which may include college/career indicators (UC A-G approval, College Credit Courses, college/career pathways, IB accreditation support, AP testing, graduation rates, etc.) and provide academic counselor support.
- Support accreditation, partnerships and approvals, which may include NCAA accreditation, WIOA partnerships, and work-based learning.
- Support schools in international educational opportunities such as international field studies, cross-cultural opportunities and projects with schools in other countries.
- Support schools in development and implementation of dual language immersion programs.
- Support schools in the development and implementation of play-based learning.

## LEADERSHIP SUPPORT:

- Leadership coaching of **the** school and ~~site~~**program** directors with the focus on leadership roles and responsibilities, building of the professional culture, co-leadership and staff support, community relations, resource management, board relations, reflective supervision, site maintenance and other leadership elements.
- Coaching for Leadership Residents to build capacity as a future School Director and support current role at school with best practices.
- Training provided through participation in monthly Leadership Connections, School Director Collaborative, ~~on-going~~ **ongoing** leadership coaching, and reflective supervision which includes assisting site leaders in development.
- Support School Directors with goals developed through reflective supervision with their school's governing board. At the end of the year, a recommendation will be prepared by iCA of the site leader's progress toward goals to assist the board in its review and evaluation of the **program director**.

## ~~PROGRAM ASSESSMENT:~~ Entire section moved up to top by Makers

## ~~EXTRACURRICULAR AND SCHOOL SUPPORT:~~

- ~~Advise and provide guidance in development, growth and maintenance of the school's extracurricular programs including sports, clubs and other groups.~~
- ~~Advise and support the school director and staff in the establishment and maintenance of support groups such as booster clubs and other parent support groups.~~
- ~~Provide guidance and support in the planning and development of school and program wide philanthropic fundraising efforts.~~
- ~~Support family engagement through providing training to families to better understand aspects of the iLEAD educational model.~~ This was moved up to section on Makers

## **SCHOOL, COMMUNITY AND AUTHORIZER RELATIONS**

- Support development and maintenance of community relations which could include local and national politicians, local chambers of commerce, local business and community leaders, local and regional media outlets (i.e., "Eye of the Valley" weekly iLEAD radio show)
- Professional educational writing services to highlight and promote school programs, activities and achievements both internally via network platforms and intranet and externally via the Being Makers website and outside professional periodicals such as *Getting Smart-Innovations in Learning* (among others).

Key:

Purple: change noted

Blue: new

Black strikethrough: removed

- Development and curation of relationships with the state and national charter organizations including but not limited to CSDC, CCSA, ACSA, NAPCS, etc.
- Development and maintenance of relationships with charter authorizing agencies, including communication and coordination of compliance, monitoring, and renewal.
- Planning, hosting, and execution of the Annual iLEAD California All-Staff Retreat, including hospitality, team building, and annual school year launch.  
Moved up from Other Services section

~~HUMAN RESOURCES~~ **EMPLOYEE SERVICES:** Changed title, moved it up from below, and reworked section to reflect all services provided

## COMPLIANCE

- Setup and maintenance of the employee files, facilitate establishment of policies and procedures to help ensure compliance with state and federal requirements.
- Establish employment policies and procedures that align to state and federal compliance.

## EMPLOYEE RELATIONS

- When new positions are created and/or if a current position evolves, support with creating and maintaining job descriptions for sites to reflect accurate duties.
- Provide coaching on ~~human resource~~ employee service matters.
- Assistance with employee relations, reflective supervision, employee evaluation, process guidance and pre-mediation services to address employee grievances.
- Coordination of the new teacher induction process.
- Compensation/Pay Analysis
- Monitoring and advising on the process in the compliance requirements of California educator licensing, credentialing, and enforcement of validity and renewal.
- Employee survey creation, collection and analysis
- ~~Creating and maintaining job descriptions~~

## ON/OFF BOARDING, LEAVES, AND WORKER'S COMPENSATION

- Facilitate ~~the~~ hiring and onboarding. As applicable, verification and tracking of DOJ clearance, TB tests, as well as credential information.
- Staff induction including onboarding, benefits enrollment (when applicable), and enrollment in appropriate platforms including email, communication platforms, LMS, etc.
- Facilitate off-boarding of employees of employment termination.
- Develop employment agreements for in-state and out-of-state personnel.
- Facilitate employee leaves and medical issues.

- Facilitate employee process for worker's compensation.

## PAYROLL

- Payroll setup, processing, payroll accounting, payroll reporting and payroll record maintenance as well as processing of the W2 and 1099 forms.
- Time accounting
- Payroll accounting and reporting (W2 and 1095)

## BENEFITS

- Assistance in employee enrollment into employee benefit plans, and assist employees in benefit questions and issues.
- Assistance and support in obtaining quotes, implementation, administration and processing of the employee benefits (health, dental, vision, life insurance, etc.) and retirement plans.

## TALENT ACQUISITION

- Coordinate, organize and execute hiring events (such as Star Search and Leadership Café) on school campuses or at an iCA space.
- Assistance and support in recruitment of the Client's school director and other leadership staff, including posting job descriptions, monitoring applications, applicant searches, vetting and presenting candidates to the client's school's governing board and/or school leadership.
- Assistance and support in recruitment of ~~facilitators, Special Education staff, Care Team etc.,~~ staff, including creating job descriptions, posting job descriptions, monitoring applications, and vetting and presenting candidates to the school leadership.

## TECHNOLOGY FUNCTIONS:

- Development of network infrastructure and design. Voice Over Internet Phone solutions, purchase, and deployment. Serve as a point of contact with network and infrastructure vendors.
- Maintain network security, maintenance, troubleshooting and infrastructure updates. Serve as point of contact with the school's internet service provider and equipment vendors, including web security software.
- Assistance in the development of technology policies. i.e. "Bring Your Own Device" and "Internet Use Policy"
- Implement and administer platforms and systems to include G-Suite email system, student information system, learning management system, user account monitoring and platform setup and maintenance support.
- Provide technical support via ticket system, coordinating with site staff and local vendors or contractors for additional device and infrastructure support when needed.

- Act as primary contact/vendor relations for required platforms and systems. Coordinate with compliance on other recommended platforms and systems.
- Oversee employee and learner IT onboarding/offboarding processes.
- Provide staff, learners and families with online testing technical support.
- Assist sites with inventory management, including device updates, refresh schedule and procurement.
- Serve as Category One ERate Coordinator, working closely with the site and the contracted ERate Consultant.

#### **BOARD SUPPORT:**

- Support board members and school staff teams in relationship building, governance processes required by CA Public Schools, and board meeting procedures.
- Training for board members about their role and effective board governance as well as assistance to board on policy development based on requirements and best practices.
- Training and support for board members on IT board platforms used to govern.
- Attendance at governing board meetings in person, over the phone or online in order to present vital school data to allow board members to make informed decisions. ~~the year to date financial statements and analysis of the school's financial position as well as the provision of the operator report.~~
- Assistance to governing board in timely preparation of required notices and board agendas pursuant to Ralph M. Brown Act as well as provision of the platform to publish board meeting agendas, record board meeting minutes and maintain board meeting archives.
- ~~Prepare reports for the Boards to allow them to make informed decisions.~~
- Coordination with the school's consultants and legal counsel for the governing board as needed.
- Publish, store, archive all documents related to board meetings and school documents.
- Support to file the corporate Statement of Information and updates as needed.

**ACCOUNTING AND FINANCIAL SERVICES:** Section was reworked to add headers and fine tune, old section is listed below with strikethrough. No services were removed

- **Payroll Accounting.** Review payroll entries and post payroll to the general ledger. Review employee coding in compliance with funding requirements.
- **Benefits Accounting.** Review benefits invoices and post journal entries. Review employee coding in compliance with funding requirements.
- **Accounts Receivable and Payable.** Reviewing and processing invoices and payments, collections, deposits and transaction recording according to the generally accepted accounting practices and standards. Assist school staff in the process of verification of received goods and services. Provide technical training and support to staff on compliant purchase and procurement processes and procedures.

- **Annual Tax Reporting.** Prepare and submit accounts payable vendor' 1099s. Support the nonprofit corporation and the auditor in preparing Form 990 and California FTB Form 199 tax-exempt organization annual filing. Support with oversight of additional common annual corporate filings, as needed.
- **General Ledger Maintenance and Reconciliation.** Setup and maintenance of organization's chart of accounts and general ledger. Prepare monthly bank reconciliation(s), journal entries and balance sheet reconciliation.
- **Internal Controls, Fiscal Policies.** Provide technical training and support on accounting procedures and best practices for financial risk management services related to the review and implementation of the Client's policies; including training on internal controls. Provide guidance and advice on fiscal compliance and best practices to school site staff.
- **Budget Development and Forecasting.** Support in budgeting and forecasting through preparation and provision of the annual and monthly budgets, updated monthly budget forecasts, development of multi-year projections, development of cash flow projections and budget revisions, managing of cash flow and lines of credit, as applicable.
- **Board Reporting.** Provide regular financial reporting to school's board.
- **Authorizer Financial Reporting.** Preparation and filing of the preliminary budget, first and second interim, estimated actuals, and unaudited actuals reports based upon governing board approval, as applicable and as mandated by authorizing agency.
- **Federal and State Systems & Reporting.** Development and preparation of the additional financial reports required for federal, state and authorizing agency reporting, as applicable, such as LCAP, federal and state grant fund financial reports, as well as special education compliance and reporting. Develop systems and processes to assist schools in compliance with federal funds, as applicable, including systems for time accounting, tracking use of federal funds.
- **Audit Support.** Review auditor contract; preparation of financial documents for the auditors and assistance to the auditors to help ensure a smooth and timely audit process. Coordinate and support annual financial audit.
- **Accounting Platform & Reporting System.** Set up and maintain core financial accounting platforms and additional components designated as necessary.
- **Bonds, Loans, Special Projects Support.** Option Project Services fees to be determined at the time of the project for additional financial projects, such as optional or one-time state or federal funds, bonds, loans, grants.
- **Developing Financing, Capital, Credit.** Assistance and support to client as needed in obtaining additional financing in the form of a line of credit, working capital cash flow, and capital leases or long-term debt.
- **Strategic Financial Planning Support.** Strategic support, coordination, and assistance to client in charter renewal, and cooperation in authorizing agency and program audits. Consult with client leadership regarding strategic planning, with a

Key:

Purple: change noted

Blue: new

Black strikethrough: removed

focus on the evaluation of financial resources, budget scenario development, and growth potential.

- ~~Accounts receivable and payable services consisting of reviewing and processing invoices and payments, collections, deposits and transaction recording according to the generally accepted accounting practices and standards. Payroll accounting. Provide technical training and support to staff on compliant accounts payable and receivable systems, processes, and procedures.~~
- ~~Purchase order processing, assist school staff in the process of verification of received goods and services and evaluation of the vendor performance and quality of services. Provide technical training and support to staff on compliant purchase and procurement processes and procedures~~
- ~~Setup and maintenance of organization's chart of accounts and general ledger, monthly bank reconciliation, journal entries and balance sheet reconciliation. Provide technical training and support on accounting procedures and best practices for financial risk management and internal controls to support clean audits. Coordinate and support annual financial audit.~~
- ~~Risk management services related to the review and implementation of the Client's policies; including training on internal controls.~~
- ~~Prepare and submit 1099s~~
- ~~Support in budgeting and forecasting through preparation and provision of the annual and monthly budgets, updated monthly budget forecasts, development of multi-year projections, development of cash flow projections and budget revisions, managing of cash flow and lines of credit, as applicable. Strategic support, coordination, and assistance to client in charter renewal, and cooperation in authorizing agency and program audits. Consult with client leadership regarding strategic planning, with a focus on the evaluation of financial resources, budget scenario development, and growth potential.~~
- ~~Preparation and filing of the preliminary budget, first and second interim, estimated actuals, and unaudited actuals reports based upon governing board approval, as applicable and as mandated by authorizing agency~~
- ~~Assistance and support to client as needed in obtaining additional financing in the form of a line of credit, working capital cash flow, and capital leases or long-term debt.~~
- ~~Assist in additional financial projects, such as optional or one-time state or federal funds, bonds, loans, grants. Option Project Services fees to be determined at the time of the project.~~
- ~~Review auditor contract, preparation of financial documents for the auditors and assistance to the auditors to help ensure a smooth and timely audit process.~~
- ~~Support the nonprofit corporation and the auditor in preparing Form 990 and California FTB Form 199 tax-exempt organization annual filing.~~
- ~~Support to file the corporate Statement of Information and updates as needed.~~

- ~~● Development and preparation of the additional financial reports required for federal, state and authorizing agency reporting, as applicable, such as LCAP, federal and state grant fund financial reports, as well as special education compliance and reporting.~~
- ~~● Develop systems and processes to assist schools in compliance with federal funds, as applicable, including systems for time accounting, tracking use of federal funds~~

## COMPLIANCE AND REPORTING:

- Assistance with the development of the internal attendance recording procedures, quarterly attendance data analysis and provision of the attendance reports to the authorizing agency, as applicable.
- Maintenance, preparation and filing of state reporting through the CALPADS system for Fall 1, Fall 2, and End of Year reporting. In addition, preparation and filing of CBEDS reporting and Civil Rights Reporting.
- Technical training and support with the Student Information System
- Support and guidance with the development of the School Accountability Report Card (SARC)
- Support and guidance with the development of the Local Control Accountability Plan (LCAP)
- Support WASC accreditation and renewal
- Support NCAA accreditation
- Support preparing all state and local required paperwork
- ATSI and Differentiated Assistance support
- Liaison between contracted service and school to ensure compliance with the National School Lunch Program (NSLP)

## FACILITIES:

### SAFETY COORDINATION AND SUPPORT

- Emergency Operation Plan (EOP) compliance and support
- Support ~~Oversee~~ and monitor monthly, semester and quarterly drills and compliance checklists
- Provide document detailing utilities and contracted services for each site
- Set up appointments and oversee fire certifications and renewals

### OPERATION; **S** AND MAINTENANCE

- Assistance and support in establishing procedures for school and/or administrative facility operations and uses of space, monitoring use of space, performing minor facility maintenance and repairs.



Key:  
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Blue: new  
Black strikethrough: removed

- Assistance with vendor search and contract negotiations for facility maintenance and repair, cleaning, logistics and transportation services for the school, as applicable.
- ~~Establish and implement a~~ ~~Creating~~ ~~process~~ ~~to vet contracted services~~ ~~producing in order~~ ~~to produce~~ a list of reputable service providers.

~~OTHER SERVICES:~~ This item was moved up to School, Community and Authorizer Relations

- ~~• Planning, hosting, and execution of the Annual iLEAD California All-Staff Retreat, including hospitality, team building, and annual school year launch.~~



# iCA Accomplishments 2021-2022



# Accomplishments: Makers



- Project and Initiative Focused
  - Culture task force and initiatives
  - NGSS tools and support training
  - PBL Design Guide/PBL New Director support to develop PBL acumen/ Completed PBL Works Innovative Leader Program
  - Chart the course for what PBL can look like in a homeschool environment (with AV, OC Studio, and “Big Exploration”), elementary PBL for iLEAD Online and virtual project, DreamUp to Space
  - CA Regional Data Improvement Science Cycle (focus on improving PBL practices using data points)
  - Arts Integration through TEAL
- Data Driven
  - Soft rollout of iDEAL with each school site
  - Data Stories, Director Slide Deck
  - Revamped Data Meetings Process for better efficiency, a higher level of comprehensiveness and effectiveness
  - Supported all testing (NWEA, CAASPP) increasing participation rates at all sites
- Learner Engagement and Success
  - Two learner teams from 4 sites collaborated with UCLA scientists at their lab for post flight analysis of experiments that returned from the International Space Station
  - Two learner teams from 3 sites have met all year for experiment optimization in preparation for experiments launching to ISS in Oct 22
  - iLEAD Student Aerospace Projects: 5 of our programs participated in Soaring Aeronautics with 100 learners participating; 2 sites ran miniPCR and Genes in Space
- Educational Partner Engagement
  - Year-long webinar on each of the iLEAD Learner Outcomes for Exploration families
  - Six-session live & recorded webinar on parenting strategies for ALL families
  - Women in Aerospace Panel; Advisory Council for Exploratorium partners, Creative Learning Systems
- Collaboration and Support
  - MATH: Streamlining math programs across the sites (Bridges and CPM); math collaborative sessions across sites; improved math scores and daily practices; targeted weekly math coaching and support; iLEAD math website; created math videos to support facilitators
  - STEAM opportunities presented to Directors to plan for and budget for 22-23
  - Partnered with SPED Department to model and train in co-teaching in our schools



# Accomplishments: Learner Support



- Continued to move more student support related-service providers and assessors in-house to directly support learners and families and decrease outside provider costs
- Increased behavioral support to directors, special education staff, general education staff across all six schools..
- Supported 800+ learners through the assessment process across all six schools.
- Decreased number of SPED due process / mediation cases across all six schools.
- Increased compliance processes in regards to CALPADS, Child Find, and SEIS.
- Parent and staff webinars provided bi-weekly by occupational therapists, speech therapists, psychologists, mental health counselors, behavior therapists and education specialists.
- Supported directors with disproportionately compliance ,
- Increased communication and support with directors through weekly check-ins, Think Tanks, Zoom calls, and site visits.
- Trainings all on Brightspace asynchronous and synchronous trainings for every department.
- Increased behavioral support on campuses for learners struggling with the return from COVID.
- Provided SST and 504 support for all six schools.
- Increased MTSS supports for all six schools and increased response to intervention supports for all learners
  - Tier One: Occupational Therapy; Speech Sound and Language Development; Orton-Gillingham Intervention; Lunch Bunch; Parent Webinars; M-F Counselor Office Hours for staff/families
  - Tier Two: Social / Emotional Groups; Speech and Language Intervention
  - Tier Three: Speech and Language Intervention
- Completed 6th Annual Student Support Symposium available to all faculty, staff, and families
- Fine tuned and carried out star search process with HR to staff all schools with student support certified staff and interns.
- Submitted plans to the SELPA for Learning Loss funds for Special Education learners, which was an increased financial support to all school sites.
- SMAA reporting that resulted in additional revenue for each site.

# Accomplishments: EL, Foster, Homeless Youth



- EL, Foster, Homeless Annual Notifications and ELPAC Results
- Built EL Documents Folders for each site
- Foster Reports to Sites and shared resources throughout the year
- Updated school websites with Homeless Youth Information and Resources
- LTEL Family Notifications
- ELAC at iLEAD Hybrid, iLEAD Lancaster, and SCVi
- Increased Reclassification Rates at Empower, SCVi, Lancaster, Online, Agua Dulce, and Hybrid
- Building relationships with support people at LACOE for Foster and Homeless Youth
- ELLEVATION and Brain Pop ELL trainings
- Continuing search for Designated ELD curriculum
- Welcomed new EL Coordinators at Online, Agua Dulce, AV, and SCVi
- Weekly Pathways checks to correct any misidentified learners
- Initial ELPAC testing throughout the year
- Summative ELPAC testing from Feb 1-May 3
- Alternate Summative ELPAC given first time this year
- Monthly EL Collabs to build community and capacity around EL policies and programs



# Accomplishments: Special Programs



- Dual Language Program at SCVi -
  - Expanded grades
  - Codified program and wrote master plan
  - developed and prepared for full implementation in 22-23 school year
  - Joined the CDE Visiting teacher program to bring in teachers from Spain and Mexico for the 22-23 school year
- Title Program
  - Set up 1st year title programs for 5 schools
    - School Site Councils developed
    - SPSAs approved
    - Pars for all employees working with learners in the program
    - Budgeting, monitoring, and quarterly CMDRC reporting
- Career/Technical Education program codified
- One Time Covid Relief funds (State and Federal)
  - Writing approving, and implementation support of school plans (ELO-G, ESSER, IPI)
  - Budgeting and monitoring one time funds for all 6 schools
  - Bi-monthly AB130 reporting, quarterly Esser reporting, annual Esser reporting
  - Trained school staff
- Universal TK
  - Adoption of policies for Admission, adoption of UPK plan for school sites
  - Assistance in compliance for credentialing, budgeting, planning, curriculum, etc.
- PARSEC Go implementation - data platform
- High School Programs: GSSMD and Biliteracy supported, SCVi AP testing set up, SCOIR accounts for all schools up and running, iAD IB Application for Candidacy completed
- ELO-P: Planning and implementing required ELO-P program for three schools to have an additional 9 hours and 30 extra days for TK-6 grade unduplicated learners starting July 2022 summer school

# Accomplishments: Diversity, Equity and Inclusion



- Through collaboration with Restorative Equity Partnership, the year two task force was divided into five action teams:
  - Learner-Centered Support
  - Recruiting, Hiring and Retention
  - Opportunity and Access
  - Professional Learning
  - School and Community Relationships
- Initial Equity training has been provided for all instructional staff (new staff trained each year)
- Each team collaborated to develop an educational partner survey or listening session for their specified area
- Listening sessions and surveys were conducted and analyzed to determine the best direction for the 2022-23 school year.
- Next year, there will be an emphasis on supporting site directors at the school level.



# Accomplishments: Leadership/Site Support



- Organization of important documents into a site dashboard for ease of use and location for directors to easily obtain
- Monthly support for site directors through individual Operations collabs, Director Check Ins, and SDC
- Monthly support for office staff through individual site collabs and OMC
- Support for sites on state reporting and student information system
  - Support for school lottery and enrollment/registration
- Monthly Counselor Collab support
- iAD High School planning and support
- Hybrid AV Exploration school planning, implementation, and support
- Independent Study Collab to implement new legislation
- Universal Pre Kindergarten Collab
- ELO-P support and Implementation
- Collaboration to further develop data protocols, director support, and educational partner meetings for the 2022-23 year.
- Weekly site visits
- Leadership substitutes
- New Director and Counselor Calendar development for 22-23 school year
- Facilitated instruction virtually to provide support for COVID Independent Study learners taking this off of sites
- Cognitive Coaching



# Accomplishments: School, Community, & Authorizer Relations



- Maintained strong relationships with and served as point of contact for school authorizers
- Completed Annual review with authorizers for each charter (FCMAT report, board meetings, authorizer meetings)
- Originated iCA newsletter
- Screened and answered options@ and info@ emails leading to enrollment
- Hosted a weekly radio show spotlighting our schools and programs (the show airs to Santa Clarita, Agua Dulce, and across Lancaster and streams online).  
*\*The show has been so successful that the station owners give us a second hour for free!*
- Represented iLEAD in the Lancaster, Santa Clarita, & Acton Agua Dulce communities at community events and with local community and elected leaders.  
(We have nurtured **strong** relationships with our 2 CA Assembly members, CA State Senator, US Congressman, City Councilmembers, local school board members, Chambers of Commerce, etc.)
- Represented SCVi (and iLEAD) on the Santa Clarita Sister Cities Executive Board and at community events.
- Coordinated iLEAD's partnership with Create California on CA State Arts Education Advocacy
- Represented iCA STEAM at the following conferences: AIAA ASCEND, CA Charter School Conference, National Science Teacher Association Conference, SXSW, Edweb, Edweek, International Astronautical Congress, AIAA
- Increased our community partnerships with aerospace and science experts in NASA, US Air Force, US Space Force, local aviation community
- Published weekly articles/periodicals on PBL, SEL, and other pedagogical practices (Making Magic articles)
- Partnered with NAACP to bring Black History Month celebration to SCVi
- Served as a community representative to various other committees and boards (Regional Arts Education Liaison, Arts for LA steering committee, Arts for Santa Clarita board president, LA County Arts Coordinators Monthly Collab, California Arts Council, National Guild for Community Arts Education, etc.)
- Represented iLEAD on the Los Angeles Arts Ed Collective (grants, coaching, create career pathways development etc.)

# Accomplishments: Employee Services



- OVERALL - the Collaborative culture built within the team and the push to support clients and iCA organizations.
- Job Description project - Progress, audit and “completion” in sight.
- Facilitator Credentialing - Awareness, monitoring and evaluation of process.
- Employee Service growth- identify areas of need and improvement (Support positions in the areas of Benefits, On-Boarding, Payroll, and Leadership).
- Successful Collaboration between Federal funding and Grant programs and ES in order to achieve federal compliance.
- Kept steady the level of professionalism and integrity when dealing with Employee Relations, and employee support (All sub department) matters.
- Supported clients in their most desperate need.



# Accomplishments: Technology



- Technology Support
  - Tickets: 12,971, Avg First Reply Time: 2.99 hours
  - Implemented an MDM platform for our window devices
  - Opened our Apple SSA/GSX account
  - In-depth inventory audits as devices return from distance learning
  - Project management/automation for improved IT onboarding
  - Platform audit, restructure, and integrations
  - Collaborating with site directors to develop their technology budgets
  - Exploration learner technology process streamlined - devices enrolled in management platform & filtered
- EdTech
  - LMS adoption and implementation with year 1 learnings ready to adapt and adjust for year 2 to better serve schools
  - Digital Citizenship/Leadership for K-5 with 6-12 and staff support in development
  - Maker and student support collaboration for ed tech initiatives and professional learning through new platform

# Accomplishments: Board Support



- Board Member Teams Are Cohesive At Each Of The Schools That We Support
  - Each Board Member Has A Voice, Is Engaged, & Seeks Understanding To Govern The School
- School Directors Have Relationships With Their Board Members
  - Emails, Invitations, Phone Calls, Continual Sharing Of Vital Information To Allow Board Members To Make Informed Decisions To Govern and Celebrate The Learners
- iCA Assisted To Boards On Policy Development Based On Requirements And Best Practices
  - Sp Ed - IEE Policies and Procedures, SPED Shared Services Updated, Mental Health Policy Renewal
  - Policies- Admissions and Enrollment Policy, Independent Study Policy , Revised Uniform Complaint Revision, , Equity Policy, PE Policy, School Records Retention and Disposal Policy, Learner Records Maintenance, Retention, and Destruction Policy, Revised Title IX Policy, Learner Residency Policy
- iCA Team Supported The OnBoarding Of 3 New Board Members and The OffBoarding Of 5 Board Members For The Schools That We Support
  - OnBoarding - Technology Platforms, Public/Authorizer/County/CSDC Notice, Governance and Board Meeting Training
  - OffBoarding - Removal From Technology Platforms, Public/Authorizer/County Notice, Service Plaques
- iCA Team Supported 38 Regularly Scheduled Board Meetings and 22 Special Board Meetings For The Schools That We Support



# Accomplishments: Accounting & Financial Support



- **Revenue/Cash flow** - Cash is stable for all six schools and iLEAD California
  - Tracked \$62+ Million in federal/state/local revenue for fiscal operations of 6 schools, 1 shared service (iCA)
  - Weathered funding deferrals equaling \$13.7 Million through CSFA ASAP TRAN program
- **AP Bills and Payroll** - paid \$60+ Million expenses/273,000+ lines of data (108 insurance bills, 216 payrolls, 15,688 bills)
- **Financial Reporting** - to Educational Partners, Boards, District/Authorizer, SELPA, State, Federal
  - Prepared and submitted 150+ financial reports
  - Collaborated with Special Programs Team on 50+ special funding reports
  - Prepared and presented 100+ financial reports at 60+ Board Meetings
- **Operations Collabs** - Held 60+ operations collabs with School Directors (10+ collabs/school)
  - BOOST (budget/finance), Employee Services, Technology, Facilities, Data Compliance, Student Support (SpEd)
- **Platform Implementations** - Sage Intacct, Bill.com (digitized AP approval system), ADP (payroll)
- **Fiscal Compliance/Operations** - Improvement of standard operating procedures and fiscal systems
  - Designed & implemented accounting/reporting system for 19 (and growing) new funding sources
  - Passed Federal funding audit for three schools - audit goes well
  - Fiscal/Operations Compliance clean up - separation of leases, contracts, employees, billing

# Accomplishments: Compliance/Reporting



- New this year: iCA fully supported all six schools to develop and write the LCAP and SARC.
- Alignment of LCAP to state priorities, required measurable outcomes, iLEAD initiatives and WASC.
- Building out of FAQ documents and how to's as it relates to compliance and reporting for sites.
- Successful and timely attendance, CALPADS, CBEDS, and Civil Rights reporting.
- Support in compliance for new state initiatives in regards to Independent Study(AB 167)
- WASC-systems established. EG-initial accreditation with 6 years (max), AD-grade 9 added for approval. SCVi-appeal granted and 6 year accreditation given, Hybrid-3 year mid-cycle visit-successful reaffirmation of accreditation for 3 more years.
- CCI Support-data reporting cleaned up, UC portal cleaned, AD UC approved, CAL-PASS Plus and National Clearinghouse reporting MOU and 1st year reporting.
- Oversight of NSLP program for 5 programs and successful NSLP audit with no findings.
- Secured additional funding for NSLP program through COVID initiatives (KIT funding, etc).



# Accomplishments: Facilities/Safety



- Covid Protocol test procurement, pick up and distribution to all sites.
- Ongoing Covid communication and support to educational partners.
- LACDPH site visits and safety inspections.
- Update websites with current K-12 reopening protocols.
- Update Covid safety plan every 6 months per CDE guidelines.
- Crisis Go rollout on site testing for staff daily support and Covid reporting.
- SARC and FIT tool safety walks for all sites.
- Playground resurfacing iLEAD AV (split with landlord).
- SCVi insurance payment procurement and repairs.
- Asbestos management plans for each site.
- Active Shooter Training all sites.
- Estimates for Bond TI at SCVi.
- EOP support and updates per CDE.
- CALSHAPE Grant applied for EG, AV, AD and SCVI.
- Organized and provided crisis support teams for all schools in response to recent school shootings, staff and learner death.



## **iLEAD Lancaster 2022 - 2023 Regular Scheduled Board Meeting**

All meetings will be held at 6:00 p.m. unless otherwise publicly noticed.  
Special Board Meetings may be scheduled as needed with 24-hour public notice.

August 18, 2022

September 8, 2022

October 27, 2022

November 3, 2022

December 8, 2022

February 9, 2023

March 9, 2023

April 6, 2023

May 11, 2023

June 22, 2023

June 29, 2023



# LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: ILEAD Lancaster

CDS Code: 19 64667 0125559

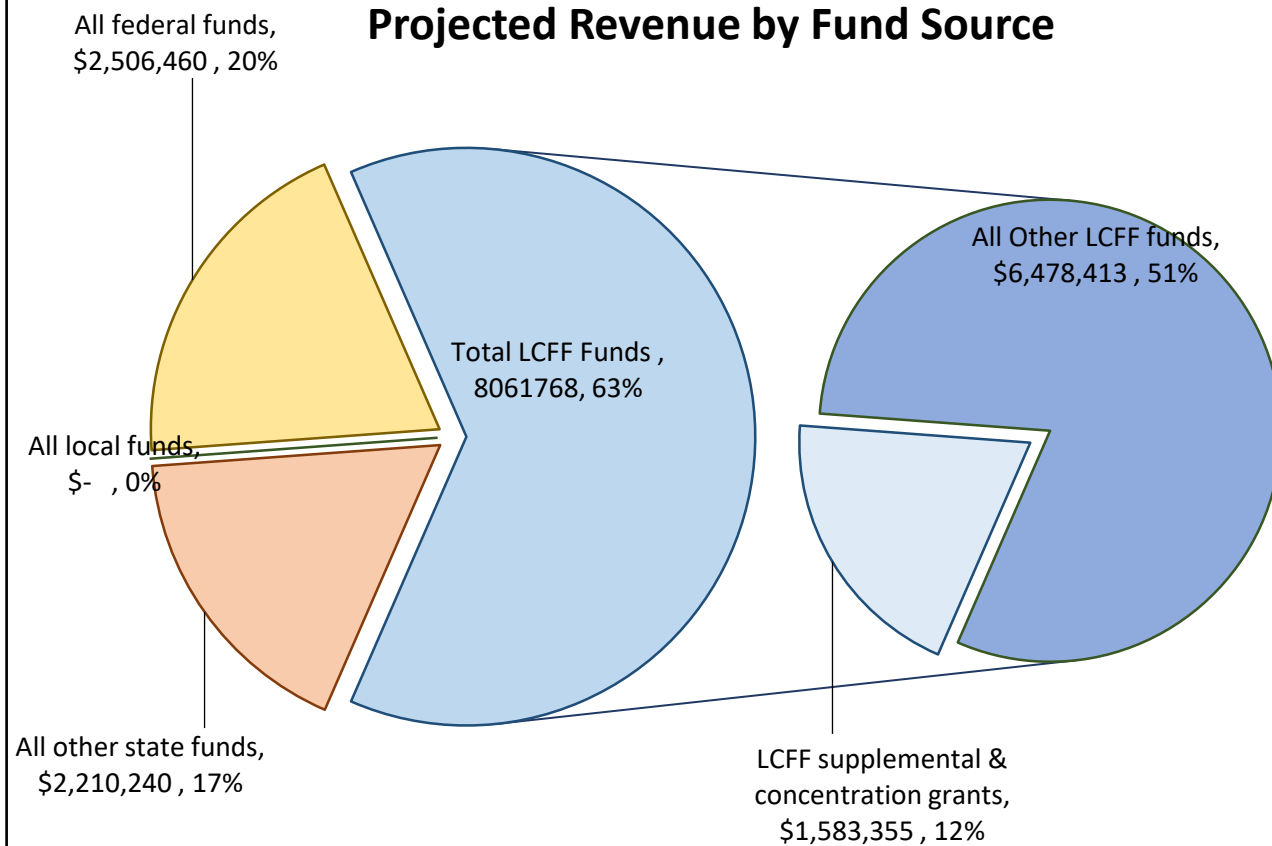
School Year: 2022 – 23

LEA contact information: Nykole Kent661-722-4287nykole.kent@ileadlancaster.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

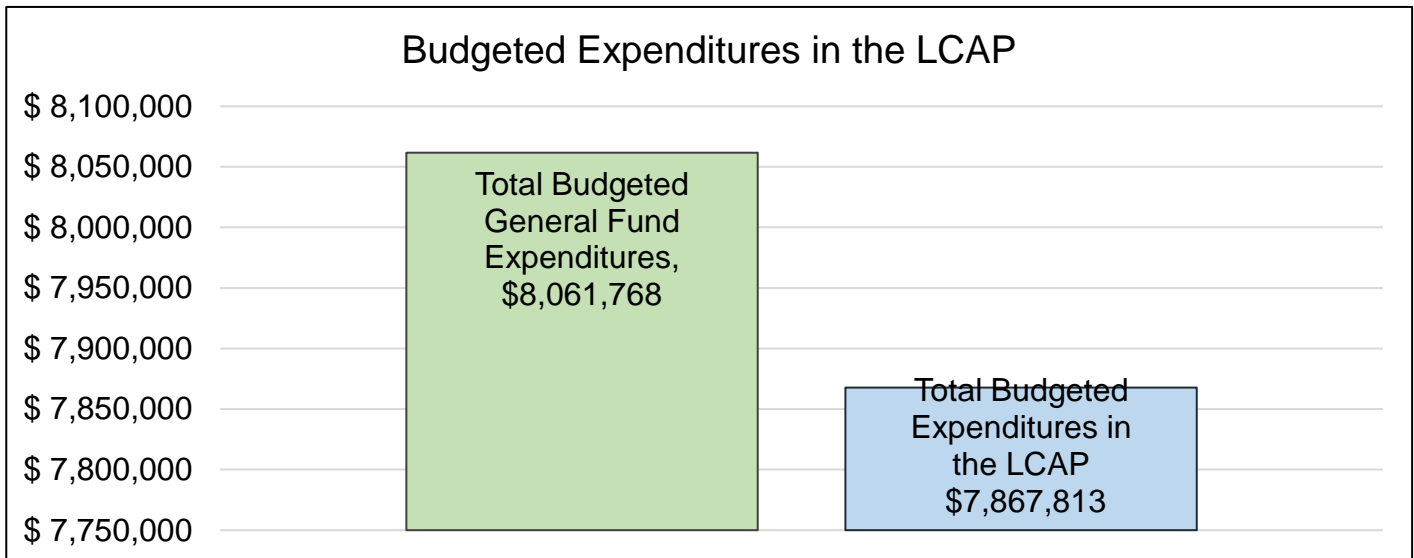


This chart shows the total general purpose revenue ILEAD Lancaster expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for ILEAD Lancaster is \$12,778,468.00, of which \$8,061,768.00 is Local Control Funding Formula (LCFF), \$2,210,240.00 is other state funds, \$0.00 is local funds, and \$2,506,460.00 is federal funds. Of the \$8,061,768.00 in LCFF Funds, \$1,583,355.00 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 Lancaster 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 Lancaster plans to spend \$8,061,768.00 for the 2022 – 23 school year. Of that amount, \$7,867,813.00 is tied to actions/services in the LCAP and \$193,955.00 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

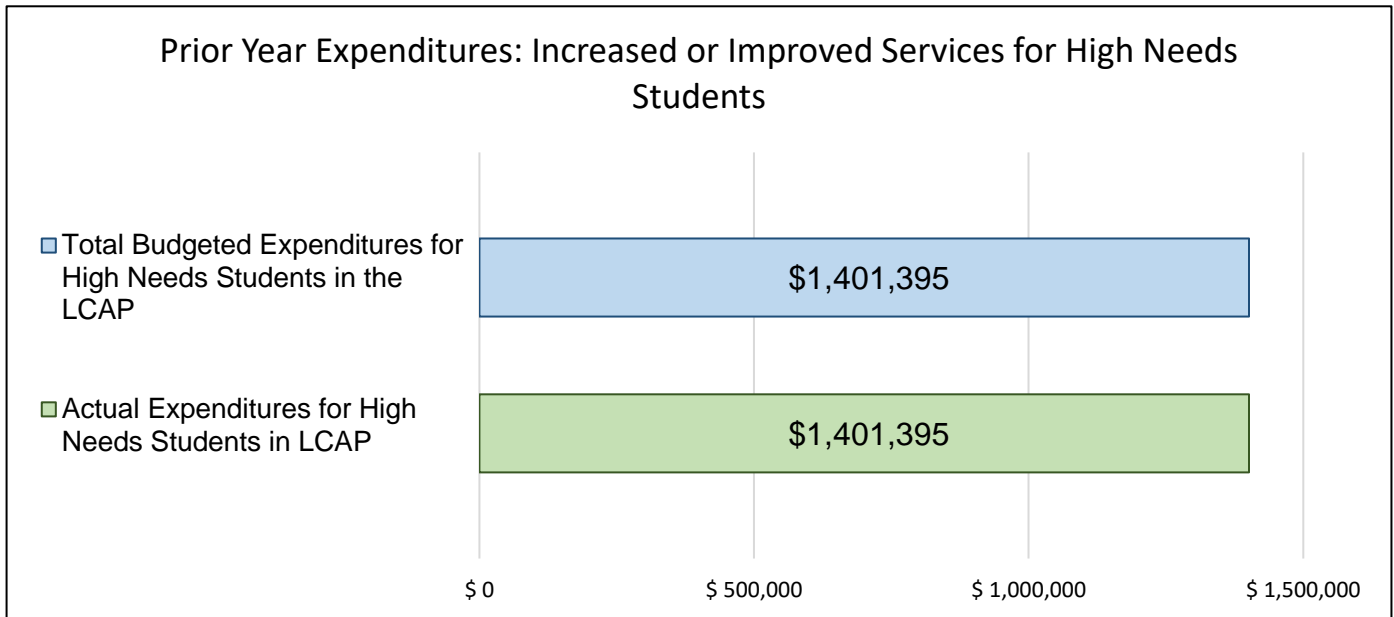
Other school expenses were allocated to state and federal funds.

## Increased or Improved Services for High Needs Students in the LCAP for the 2022 – 23 School Year

In 2022 – 23, ILEAD Lancaster is projecting it will receive \$1,583,355.00 based on the enrollment of foster youth, English learner, and low-income students. ILEAD Lancaster must describe how it intends to increase or improve services for high needs students in the LCAP. ILEAD Lancaster plans to spend \$1,583,355.00 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 Lancaster budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what ILEAD Lancaster 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 Lancaster's LCAP budgeted \$1,401,395.00 for planned actions to increase or improve services for high needs students. ILEAD Lancaster actually spent \$1,401,395.00 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 10, 2022

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
iLEAD Lancaster Charter	Nykole Kent, Director	(661) 722-4287 nykole.kent@ileadlancaster.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 Lancaster has received the Extended Learning Opportunity and the In Person Instruction Grants. Engagement and consultation with educational partners and the community at large took place with 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.

In June 2021, based on anticipated 770 ADA, iLEAD Lancaster anticipated receiving \$941,303 in concentration grant money. Due to the lower ADA as of P1 of 651, the school only received \$780,481 in concentration grant money including the add-on funding this year. This money allowed the school to retain the school counselor to work with the learners who are at-risk and deemed low-income, English learner, and/or foster youth for additional support.

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 Lancaster has received the Elementary and Secondary School Emergency Relief (ESSER) I, 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, working with parent groups, 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 Lancaster'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 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 Lancaster developed and implemented a COVID-19 Safety Plan and Prevention Program (posted on the school's website) which outlined safety protocols. The School Director has 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 I was utilized for extra office staff and a social worker, as well as purchasing additional curriculum including STEMulate, Edmentum, Mystery Science, Mosa Mack science, Flinn Scientific and STEM supplies. The In-Person Instruction Grant purchased needed curriculum, emergency and safety supplies, office supplies, and IT equipment and supplies in order to return to campus with a safe continuity of learning.

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, 3 and 8 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 Lancaster Charter	Nykole Kent Director	nykole.kent@ileadlancaster.org 818-620-0966

## 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 Lancaster Charter School, located in Lancaster, California, opened in September 2012. The school serves TK- 8th grades with an enrollment of 736 learners during the 2021-22 school year. The school's population is 43.1% Hispanic or Latino; 28% African American; 16.2% White; 10.9% Two or More Races, 0.7% Asian; 0.5% Filipino; 0.4% Not Reported; and 0.3% American Indian or Alaska Native. 73.2% of iLEAD Lancaster learners qualify for free and reduced meals.

iLEAD Lancaster offers a learner-centered approach to education that focuses on an interdisciplinary project-based learning 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 Lancaster'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 alike reflect on student growth in each of these areas through use of the iLEAD Comprehensive Growth Card.

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.

Through thoughtfully-designed learning environments and the implementation of professional learning on diversity, equity and inclusion, it is iLEAD Lancaster'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. The school incorporates technology as a regular part of the learning process. 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 (5.7%), Students with Disabilities (15.1%), Socioeconomically Disadvantaged (73.5%), those experiencing Homelessness (1.9%), and Foster Youth (2.4%). At iLEAD Lancaster, English learners receive designated and integrated language support throughout the school day. Students with Disabilities are taught in inclusive general education classes as much as possible according to the needs of their individualized education plans providing them with the least restrictive environment possible.

Using restorative practices and Leader in Me training, iLEAD Lancaster places a special emphasis on leadership, critical thinking, collaboration, and creativity. School staff encourages leadership in each learner by instilling the confidence and character that inspires others when one thinks for themselves. The school provides humanities, arts, the Makerspace, an Exploratorium (workspace areas for learners), and hands-on 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 Lancaster's learners safely returned to school and maintained in-person instruction. The school's proudest successes include:

- Professional Learning: Staff received diversified professional development in a variety including diversity, equity and inclusion, culturally relevant instruction, trauma-informed practices, curriculum and instruction, and more!
- Social-Emotional Well-Being: The school was trained in Leader In Me, empowering learners and staff to take initiative in personal leadership and conflict resolution.
- School Community: Through use of the school facilities including the Exploratorium and Makerspace, learners were engaged in clubs, drama and tutoring.
- The school has many community partnerships to benefit its unduplicated learners.

## 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 Lancaster was 63.9 points below standard on the 2019 CA School Dashboard (the state was 2.5 points below standard)

On the 2019 CA School Dashboard, African American, English Learners, Two or More Races, Socioeconomically Disadvantaged, Students With Disabilities and White are in the orange tier.

-Academic Achievement: Math

iLEAD Lancaster was 110.7 points below standard on the 2019 CA School Dashboard (the state was 33.5 points below standard)

On the 2019 CA School Dashboard, English Learners and Hispanic are in the red tier, and African American, Students With Disabilities, Socioeconomically Disadvantaged, Two or More Races, and White are in the orange tier

-Chronic Absenteeism

iLEAD Lancaster's chronic absenteeism rate was 32.6% for all students on the 2019 CA School Dashboard (the state was 10.1% chronically absent)

On the 2019 CA School Dashboard, African American, Students With Disabilities, Socioeconomically Disadvantaged, Two or More Races are in the red tier.

Two additional identified needs involve:

- Ensuring the ongoing social-emotional well-being of learners are being met as a result of the pandemic.
- Ongoing monitoring of teacher credentialing.

## 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 Lancaster'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 data to close achievement gaps in ELA and math.

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 well-being 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.
<p>iLEAD Lancaster 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 Lancaster 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 Lancaster's three existing goals were maintained, expanded or modified to further learner achievement and continue the development of program offerings.</p> <p>During the 2021-22 school year, monthly iSUPPORT meetings, Parent Universities, and Coffees with the Director were held to allow opportunity for school staff and families to connect regarding the school program. Informal feedback was also received by families through family involvement at schoolwide events. ELAC meetings were held on 10/6/21 and 2/23/22 for families of EL learners to provide program feedback. 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.</p> <p>Twice a year, iLEAD Lancaster 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). Additionally, in the spring of 2022, iLEAD Schools' Equity Task Force also conducted listening sessions and/or facilitated surveys of staff, leadership and learners.</p>

Monthly board meetings were held virtually and in-person with the opportunity for anyone from the public to attend (including staff, parents and learners). On June 23, 2022, a public hearing was held for additional feedback before the LCAP was board approved on June 30, 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. Academic data on internal benchmarks and the 2019 CA State Dashboard show several areas for growth by student group, and learners are benefitting from additional tutoring and academic resources provided. The school's homeless liaison reported that unduplicated learners benefitted from differentiated services according to individual needs, though much work is still needed in the area of student achievement across student groups. Learners have benefitted from Leader In Me training that promotes student leadership in resolving conflict.

#### A description of the aspects of the LCAP that were influenced by specific input from educational partners.

Professional Learning and MTSS (Goal 1): Through professional learning in restorative practices, PBL, first best instruction, 7 Habits, diversity, equity and inclusion, facilitators will have more tools to support the diverse population they serve. MTSS continues to be developed so that all struggling learners are receiving the support needed.

Academic Achievement (Goal 2): School staff is working to refine their monitoring processes to ensure achievement for its learners including specific student groups.

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 Lancaster'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
School Pathways SARC	2020-21 School Pathways: Credential Facilitators: 15/27 or 55% Intern Credential 5/27 or 19% Uncredentialed (PIP/STP) 8/27 or 30%  (SARC data not available for 2019-20)	2021-22 School Pathways: Credentialed: 18/32 or 56% Intern Credential: 12/32 or 38% Uncredentialed: 2/32 or 6%  (SARC data not available for 2020-21)			SARC: 0 Misassignments of Teachers of English Learners 0 Total Teacher Misassignments  School Pathways: Credential Facilitators: 74% Intern Credential: 26% Uncredentialed: 0%

CA School Dashboard Local Indicator	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
SARC	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).	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).
CA School Dashboard Local Indicators	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 CA School Dashboard: 37.5% making progress towards English proficiency	2019 CA School Dashboard: 37.5% making progress towards English proficiency			48.3% making progress towards English proficiency
Professional Learning	2020-2021: 100% of staff have engaged in professional learning to improve learner outcomes.	2021-2022: 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.
Panorama Survey Data	2020-2021: 64.2% of parents/guardians feel the curriculum, courses, and resources available through the school are engaging/motivating, meet their learner's needs, and are preparing	2021-2022: 65.4% of parents/guardians feel the curriculum, courses, and resources available through the school are engaging/motivating, meet their learner's needs, and are preparing them			67% of parents/guardians will 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.



	them for next year. (averaged parent/guardian surveys IS & site)	for the next school year.			
CA School Dashboard	2019 CA School Dashboard Local Indicator: 0% Percent Of Students Without Access To Their Own Copies Of Standards-Aligned Instructional Materials For Use At School And At Home	2019 CA School Dashboard Local Indicator: 0% Percent Of Students Without Access To Their Own Copies Of Standards-Aligned Instructional Materials For Use At School And At Home			0% Percent Of Students Without Access To Their Own Copies Of Standards-Aligned Instructional Materials For Use At School And At Home
CA School Dashboard	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

## Actions

Action #	Title	Description	Total Funds	Contributing
1	Fully Credentialed and Appropriately Assigned Staff	Fund appropriately assigned and credentialed staff (base salaries and benefits) in order to provide instruction and support for all learners. Facilitators will be provided with support and resources on a 1:1 basis as needed, with the goal of all teachers being fully credentialed in order to increase teacher retention, thus improving equitable opportunities and outcomes for all learners (State Priority #1).	\$3,391,887.00	No
2	High Needs Support Team	Dedicate staff to support unduplicated learners in their academic and social emotional achievement (State Priority #1).	\$1,060,855.00	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).	\$283,388.00	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).	\$579,377.00	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).	\$105,000.00	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).	\$535,324.00	No
8	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).	\$636,698.00	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, learners fully returned to school. Facilities were clean, safe and maintained. A new math curriculum was successfully implemented to support learners in their academic achievement. Additionally, staff received diversified professional learning in culturally relevant instruction, writer's workshop, special education, diversity equity and inclusion, math, Leader In Me (training staff and learners to be leaders), Zoophonics, Daily 5, and trauma-informed practices. The school also successfully implemented MTSS to track, monitor and further support learners in closing achievement gaps.

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 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 for concentrated, strategic efforts on lowering the achievement gap between "all students" and those with additional barriers or challenges to academic success.

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: 95% Participation Rate - ELA 93% Participation Rate - Math  All Students 2019 CA School Dashboard ELA: 63.9 points below standard/increased 14.9 points (yellow) Math: 110.7 points below standard/increased 4.9 (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 90.26%</p> <p>NWEA MAP Spring 2022 All Students Participation Rate - Math 91.56%</p> <p>NWEA MAP Spring 2022 All Students Reading CGI -1.52</p> <p>NWEA MAP Spring 2022 All Students Math CGI -0.43</p>				
<p>EL Learners: CA School Dashboard State Indicator: ELA and Math CAASPP Testing Scores DataQuest: School Dashboard Additional Reports and Data - CAASPP Participation Rates</p>	<p>EL Learners 2019 DataQuest: 98% Participation Rate - ELA 96% Participation Rate - Math</p> <p>EL Learners 2019 CA School Dashboard: ELA: 108 points below standard/increased 18.7 points (orange) Math: 154.1 points below standard/declined 16 points (red)</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 desired outcomes for CAASPP once spring 2022 CAASPP scores are received in the fall of 2022.</p>
<p>Socioeconomically Disadvantaged: CA School Dashboard State Indicator: ELA and Math CAASPP Testing Scores DataQuest: School Dashboard Additional Reports and Data - CAASPP Participation Rates</p>	<p>Socioeconomically Disadvantaged 2019 DataQuest: 96% Participation Rate - ELA 94% Participation Rate - Math</p> <p>Socioeconomically Disadvantaged 2019 CA School Dashboard: ELA: 73.5 points below standard/increased 23.9 points (orange)</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 desired outcomes for CAASPP once spring 2022 CAASPP scores are received in the fall of 2022.</p>

	Math: 119.5 points below standard/increased 17 points (orange)				
Foster Youth: CA School Dashboard State Indicator: ELA and Math CAASPP Testing Scores DataQuest: School Dashboard Additional Reports and Data - CAASPP Participation Rates	Foster Youth 2019 DataQuest: 91% Participation Rate - 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)	Same as baseline.			95% CAASPP Participation - ELA & Math  CAASPP: The school will set desired outcome once baseline data is available.
African American: CA School Dashboard State Indicator: ELA and Math CAASPP Testing Scores DataQuest: School Dashboard Additional Reports and Data - CAASPP Participation Rates	African American 2019 DataQuest: 92% Participation Rate - ELA 90% Participation Rate - Math  African American 2019 CA School Dashboard: ELA: 87 points below standard/increased 4 points (orange) Math: 126.6 points below standard/increased 18.7 points (orange)	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 desired outcomes for CAASPP once spring 2022 CAASPP scores are received in the fall of 2022.
Two or More Races: CA School Dashboard State Indicator: ELA and Math CAASPP Testing Scores DataQuest: School Dashboard Additional Reports and Data - CAASPP	Two or More Races 2019 DataQuest: 98% Participation Rate - ELA 98% Participation Rate - Math  Two or More Races 2019 CA School Dashboard:	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 desired outcomes for CAASPP once spring 2022 CAASPP scores are

Participation Rates	ELA: 75.6 points below standard/increased 18.2 points (orange) Math: 112.2 points below standard/increased 19.6 points (orange)				received in the fall of 2022.
Students With Disabilities: CA School Dashboard State Indicator: ELA and Math CAASPP Testing Scores DataQuest: School Dashboard Additional Reports and Data - CAASPP Participation Rates	Students With Disabilities 2019 DataQuest: 85% Participation Rate - ELA 82% Participation Rate - Math  Students With Disabilities 2019 CA School Dashboard: ELA: 108.2 points below standard/increased 18.4 points (orange) Math: 142.8 points below standard/increased 27.6 points (orange)	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 desired outcomes for CAASPP once spring 2022 CAASPP scores are received in the fall of 2022.
DataQuest: EL Data: Annual Reclassification Counts and Rates	2019-20: 2.1% reclassification rate	2020-21: 4.5% reclassification rate			10% reclassification rate
iLEAD Comprehensive Growth Card	Spring 2022 Participation Rates: K-2 Facilitators: 96.8% 3-8 Facilitators: 98.8% K-2 Learners: 70.2% 3-8 Learners: 70.3%  Fall 2021 Results: 59% of learners achieved their academic ILP goal. 49% of learners achieved their SEL ILP goal.	Same as baseline.			100% of facilitators and 80% of learners will complete the iLEAD Comprehensive Growth Card. 60% of learners will achieve their academic ILP goal. 50% of learners will achieve their SEL ILP goal.

## 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 curriculum as reflected on state assessments and other internal measures. Using a variety of strategies, facilitators and staff will implement Bridges curriculum for math for grades K – 5 and College Preparatory Mathematics curriculum for grades 6-8. Zoophonics, Edmentum literacy and a writing curriculum will be utilized as well so that facilitators and staff can analyze ongoing formative, interim, and summative assessments. Director and grade level teams will analyze data during monthly data protocol grade-level meetings and monthly action plans will be created to close learning gaps (State Priority #4).	\$506,734.00	No
2	EL Student Achievement	School staff will support and track EL learners in their mastery of standards through integrated core projects and curriculum as reflected on state assessments and other internal measures (State Priority #4).	\$350,000.00	Yes
3	Socioeconomically Disadvantaged Achievement (repeated expenditure, Goal 2, Action 2)	School staff will support and track socioeconomically disadvantaged learners in their mastery of standards through integrated core projects and curriculum as reflected on state assessments and other internal measures (State Priority #4).	\$0.00	Yes
4	Foster/Homeless Youth Achievement (repeated expenditure, Goal 2, Action 2)	School staff will support and track foster/homeless youth in their mastery of standards through integrated core projects and curriculum as reflected on state assessments and other internal measures (State Priority #4).	\$0.00	Yes
5	African American Achievement (repeated expenditure, Goal 2, Action 1)	School staff will support and track African American learners in their mastery of standards through integrated core projects and curriculum as reflected on state assessments and other internal measures (State Priority #4).	\$0.00	No
6	Two or More Races Achievement (repeated expenditure, Goal 2, Action 1)	School staff will support and track foster/homeless youth in their mastery of standards through integrated core projects and curriculum as reflected on state assessments and other internal measures (State Priority #4).	\$0.00	No
7	Students with Disabilities Achievement (repeated expenditure, Goal 1, Action 8)		\$0.00	No
8	EL Reclassification (repeated expenditure, Goal 2, 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
9	Individual Learning Plan	Through a variety of strategies including professional development sessions, learner-led	\$0.00	No



(ILP) (repeated expenditure, Goal 1, Action 1)	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).		
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## 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 tracked and 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.

Through use of the school’s Exploratorium and the Makerspace, learners are engaged in projects and activities that promote technological literacy. The school continues to monitor its student groups for student achievement. School staff works with learners to create goals and action plans to improve academic performance and social-emotional learning (SEL).

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 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	The school holds a minimum of six educational partner meetings a year.	The school holds a minimum of six educational partner meetings a year.			The school will hold a minimum of ten educational partner meetings per 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
CALPADS 8.1b: Middle School Drop Out Rate Number of Community Partnerships	2020-21 CALPADS: 2020-21 Middle School Dropout Rate: 0% 15 community partnerships	2020-21 CALPADS: Middle School Dropout Rate: 0% 20 community partnerships			Middle School Dropout Rate: 0% 30 community partnerships
EL Learners:	EL Learners:	EL Learners:			EL Learners:

Counselor Data	EL learners and their families will receive additional counseling, social emotional, and academic support/resources from school staff.	2021-22: 100% of EL learners and their families received additional counseling, social emotional, and academic support/resources from school staff.			100% of EL learners and their families will receive additional counseling, social emotional, and academic support/resources from school staff.
Foster Youth: Counselor Data	Foster Youth: Foster youth and their families receive additional counseling, social emotional, and academic support/resources from school staff.	Foster Youth: 2021-22: 100% of foster youth and their families received additional counseling, social emotional, and academic support/resources from school staff.			Foster Youth: 100% of foster youth and their families will receive additional counseling, social emotional, and academic support/resources from school staff.
Socioeconomically Disadvantaged: Counselor Data	Socioeconomically Disadvantaged: Socioeconomically disadvantaged and their families receive additional counseling, social emotional, and academic support/resources from school staff.	Socioeconomically Disadvantaged: 2021-22: 100% of socioeconomically disadvantaged and their families received additional counseling, social emotional, and academic support/resources from school staff.			Socioeconomically Disadvantaged: 100% of socioeconomically disadvantaged and their families will receive additional counseling, social emotional, and academic support/resources from school staff.
CA School Dashboard State Indicator: Chronic Absenteeism CALPADS Report 14.1: Attendance Rate	2019 CA School Dashboard: 32.6% Chronic Absenteeism 2020-21 Attendance Rate: 72.97% of learners were absent ten or less days.	2019 CA School Dashboard: 32.6% Chronic Absenteeism 2020-21 Attendance Rate: 72.97% of learners were absent ten or less days.			10.1% Chronic Absenteeism Attendance Rate: 80% of learners were absent ten or less days.
CA School Dashboard State Indicator: Suspension Rate DataQuest: Expulsion Rate CA School Dashboard Local Indicator: Local	2019 CA School Dashboard: 1.2% suspended at least once (declined 0.3% - green) 2020-21 Expulsion Rate: 0% expulsion rate. CA School Dashboard	2019 CA School Dashboard: 1.2% suspended at least once (declined 0.3% - green) 2020-21 Expulsion Rate: 0% expulsion rate. CA School Dashboard			Less than 1% suspension rate. Expulsion Rate: 0% Local Climate Survey: Standard Met

Climate Survey	Local Indicator: Local Climate Survey: Standard Met	Local Indicator: Local Climate Survey: Standard Met			
Panorama Learner Survey Data	2022 Panorama Learner Survey: 72% positive school-teacher relationships	Same as baseline.			80% positive school-teacher relationships

## Actions

Action #	Title	Description	Total Funds	Contributing
1	Educational Partners	iLEAD Lancaster will incorporate multiple ways for families to engage, connect with the community through volunteer and outreach strategies, and provide communication amongst all educational partners to promote learner engagement and awareness of the mission and vision of iLEAD Lancaster. To solicit feedback, the school will also conduct an annual survey for input on the school and its programs (State Priority #3, #6).	\$10,417.00	No
2	Family Education	In order to promote engagement, school staff will provide continuous education opportunities for families on iLEAD cultural pieces such as Love & Logic, Restorative Practices, and/or 7 Habits/Leader in Me. Regular TED Talks and Parent University workshops on topics related to the mission and vision will also be provided (State Priority #3).	\$100,000.00	No
3	Academic Counseling and Support (repeated expenditure, Goal 1, Action 1)	School staff will provide academic counseling and resources to lower (or maintain) the dropout rate of its middle school learners. The school will also increase the number of community partnerships to support learners and their families (State Priority #5).	\$0.00	No
4	EL Academic Counseling and Support	EL Academic Counseling and Support: The EL Coordinator and other school staff will will provide academic counseling and resources to lower (or maintain) the dropout rate of its EL middle school learners (State Priority #5).	\$67,500.00	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 lower (or maintain) the dropout rate of its homeless and foster youth middle school learners (State Priority #5).	\$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 lower (or maintain) the dropout rate of its socioeconomically disadvantaged middle school learners (State Priority #5).	\$0.00	Yes
7	School Attendance	The attendance support team and school staff will work with all learners and specific student groups exhibiting challenges with academics and SEL to minimize chronic	\$184,805.00	No

		absenteeism and support a strong attendance rate. The team will implement the improvement plan for chronic absenteeism, support the SST process and conduct home visits (State Priority #5).		
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/Leader in Me 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).	\$55,828.00	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.

During the 2021-22 school year, iLEAD Lancaster provided a leadership class for middle schoolers. The school utilizes restorative practices to support student engagement and lower chronic absenteeism rates. Parent Universities were held including a 7 Habits workshop. School staff conducted home visits. The school offered engineering, drama, and tutoring clubs to foster community and engagement.

### 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. 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)
\$1,583,355.00	

## 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
24.44%	0.00%	\$0.00	24.44%

**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 Lancaster, 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, 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 Lancaster learners were 63.9 points below standard overall (the state was 2.5 points below standard), yet English learners were 108 points below standard, socioeconomically disadvantaged were 73.5 points below standard.

Math: In the “All Students” category, iLEAD Lancaster learners were 110.7 points below standard overall (the state was 33.5 points below standard), yet English learners were 154.1 points below standard and socioeconomically disadvantaged were 119.5 points below standard.

Chronic Absenteeism: 32.6% of all iLEAD Lancaster learners were chronically absent (compared to 10.1% of all students in the state), yet 37.6% of socioeconomically disadvantaged were chronically absent. In this case, 23.2% of English learners 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.

In goal two, the school plans to monitor these identified student groups both academically and socially-emotionally in order to provide additional, targeted support. Facilitators will be able to better identify, support and implement practices/resources that increase services to these unduplicated groups.

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.

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.

#### 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.

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.

The school's plan is to utilize an EL coordinator/liaison, counselors, credentialed and/or support staff to increase community partnerships, provide direct and wrap-around services to these learners, and support their academic and social-emotional well-being.

<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		24:1
Staff-to-student ratio of certificated staff providing direct services to students		20:1

# 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	\$7,867,813.00				\$7,867,813.00	\$4,452,742.00	\$3,415,071.00

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	\$3,391,887.00				\$3,391,887.00
1	2	High Needs Support Team	English learner (EL), Foster Youth, Low Income	\$1,060,855.00				\$1,060,855.00
1	3	Access to Standards-Aligned Instructional Materials	All	\$283,388.00				\$283,388.00
1	4	School Facilities	All	\$579,377.00				\$579,377.00
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)	\$105,000.00				\$105,000.00
1	7	Professional Learning	All	\$535,324.00				\$535,324.00
1	8	Multi-Tiered Systems of Support	All	\$636,698.00				\$636,698.00
2	1	Student Achievement	All	\$506,734.00				\$506,734.00
2	2	EL Student Achievement	English learner (EL)	\$350,000.00				\$350,000.00
2	3	Socioeconomically Disadvantaged Achievement (repeated expenditure, Goal 2, Action 2)	Low Income					\$0.00
2	4	Foster/Homeless Youth	Foster Youth					\$0.00

		Achievement (repeated expenditure, Goal 2, Action 2)						
2	5	African American Achievement (repeated expenditure, Goal 2, Action 1)	African-American					\$0.00
2	6	Two or More Races Achievement (repeated expenditure, Goal 2, Action 1)	Two or More Races					\$0.00
2	7	Students with Disabilities Achievement (repeated expenditure, Goal 1, Action 8)	Student with Disabilities (SWD)					\$0.00
2	8	EL Reclassification (repeated expenditure, Goal 2, Action 2)	English learner (EL)					\$0.00
2	9	Individual Learning Plan (ILP) (repeated expenditure, Goal 1, Action 1)	All					\$0.00
3	1	Educational Partners	All	\$10,417.00				\$10,417.00
3	2	Family Education	All	\$100,000.00				\$100,000.00
3	3	Academic Counseling and Support (repeated expenditure, Goal 1, Action 1)	All					\$0.00
3	4	EL Academic Counseling and Support	English learner (EL)	\$67,500.00				\$67,500.00
3	5	Homeless and Foster Youth Academic Counseling and Support (repeated expenditure, Goal 3, Action 4)	Foster Youth					\$0.00
3	6	Socioeconomically Disadvantaged Academic Counseling and Support (repeated expenditure, Goal	Low Income					\$0.00

		3, Action 4)						
3	7	School Attendance	All	\$184,805.00				\$184,805.00
3	8	School Climate (repeated expenditure, Goal 3, Action 7)	All					\$0.00
3	9	Learner Engagement	All	\$55,828.00				\$55,828.00

## 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
\$6,478,413.00	\$1,583,355.00	24.44%	0.00% - No Carryover	24.44%	\$1,583,355.00	0.00%	24.44%	<b>Total:</b>	\$1,583,355.00
								<b>LEA-wide Total:</b>	\$1,583,355.00
								<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	English learner (EL), Foster Youth, Low Income	All Schools	\$1,060,855.00	
1	6	ELD Implementation of State Standards	Yes	LEA-wide	English learner (EL)	All Schools	\$105,000.00	
2	2	EL Student Achievement	Yes	LEA-wide	English learner (EL)	All Schools	\$350,000.00	
2	3	Socioeconomically Disadvantaged Achievement (repeated expenditure, Goal 2, Action 2)	Yes	LEA-wide	Low Income	All Schools		
2	4	Foster/Homeless Youth Achievement (repeated expenditure, Goal 2, Action 2)	Yes	LEA-wide	Foster Youth	All Schools		
2	8	EL Reclassification (repeated expenditure, Goal 2, 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	\$67,500.00	
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:	\$6,718,426.50	\$6,360,135.00

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	Credentialing (1000 3000)	No	\$1,547,402.00	\$1,547,402.00
1	2	CCSS Materials (2110 Class ed prog staff)	No	\$554,227.00	\$554,277.00
1	3	CCSS implementation of instructional materials (4100s core curric)	No	\$86,998.00	\$86,998.00
1	4	English Learners access to curriculum (4100s core curric contrib)	Yes	\$148,000.00	\$128,000.00
1	5	Homeless/Foster (1000 3000 cont) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
1	6	Socioeconomically disadvantaged (1000 3000 contr) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
1	7	Professional Development (5802 PD) (repeated expenditure, Goal 1, Action 9)	No	\$0.00	\$0.00
1	8	Facilities (2960)	No	\$218,532.00	\$218,532.00
1	9	Professional Development (5200s contr)	Yes	\$92,000.00	\$92,000.00
1	10	Students with Disabilities (1310 1910 1930) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
1	11	Credentialing (1.1 1000 300 contrib)	Yes	\$97,741.00	\$122,988.00
1	12	Credentialing (1.1 5801 iCA	No	\$63,147.00	\$63,147.00

		emp serv)			
1	13	CCSS Materials (1.2 2120 Care Team salaries and benes contrib)	Yes	\$597,061.00	\$654,622.00
1	14	CCSS materials (1.2 5801 iCA Educ supp)	No	\$94,487.00	\$94,487.00
1	15	CCSS Materials (1.2 5801 iCA PD SEL and MTSS cont)	Yes	\$131,835.00	\$123,508.00
1	16	CCSS Materials (1.2 5801 iCA EL support)	Yes	\$16,957.50	\$16,429.00
1	17	CCSS Materials (1.2 5852 iCA Stu support sped)	No	\$525,695.00	\$517,519.00
1	18	CCSS Materials (1.2 5802 iCA Makers)	No	\$40,097.00	\$40,097.00
1	19	CCSS Materials (1.2 5801 iCA Makers contrib)	Yes	\$40,097.00	\$39,999.00
1	20	CCSS materials (1.2 5801 iCA Tech supp)	No	\$51,972.00	\$51,972.00
1	21	CCSS implementation of instructional materials (1.3 4300s educ matl)	No	\$86,355.00	\$86,355.00
1	22	CCSS Implementation of instructional materials (1.3 4400s stu tech dev)	No	\$404,575.00	\$404,575.00
1	23	CCSS Implementation of Instructional Materials (1.3 5801 iCA Tech support) (repeated expenditure, Goal 1, Action 2)	No	\$0.00	\$0.00
1	24	English learner access to curriculum (1.4 2120 care team contrib) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00
1	25	English Learner access to curriculum (1.4 iCA Tech support) (repeated expenditure, Goal 1, Action 2)	No	\$0.00	\$0.00
1	26	English Learner access to curriculum (1.4 iCA EL support cont) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00



1	27	Homeless/foster (1.5 5801 iCA PD SEL and MTSS contr) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00
1	28	Professional development (1.7 5852) (repeated expenditure, Goal 1, Action 2)	No	\$0.00	\$0.00
1	29	Facilities (1.8 5801 iCA Fac supp)	No	\$21,972.00	\$21,924.00
1	30	Facilities (1.8 4330 4325 4355)	No	\$95,296.00	\$96,568.00
1	31	Facilities (1.8 5500s utilities)	No	\$142,499.00	\$83,958.00
1	32	Facilities (1.8 5600 rent etc)	No	\$990,509.00	\$829,301.00
1	33	Facilities (1.8 2910 Care team play space)	No	\$72,790.00	\$72,790.00
1	34	Professional Development (1.9 1310 1910 1930) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
1	35	Professional Development (1.9 5801 iCA Ed supp) (repeated expenditure, Goal 1, Action 2)	No	\$0.00	\$0.00
1	36	Students with Disabilities (1.10 5852 iCA stu suppt) (repeated expenditure, Goal 1, Action 2)	No	\$0.00	\$0.00
2	1	Assessments (1310 1910 1930 ) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	2	Professional Development (2120 care team contr) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00
2	3	English Learner (2120) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00
2	4	Math curriculum (5200s cont) (repeated expenditure, Goal 1, Action 9)	Yes	\$0.00	\$0.00
2	5	Middle school math Curriculum (5200s cont)	Yes	\$0.00	\$0.00

		(repeated expenditure, Goal 1, Action 9)			
2	6	Curriculum (4300s edmentum cont) (repeated expenditure, Goal 1, Action 4)	Yes	\$0.00	\$0.00
2	7	English Learner (5200s cont) (repeated expenditure, Goal 1, Action 9)	Yes	\$0.00	\$0.00
2	8	English Learner (2120) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00
2	9	Extracurricular (2120 care team cont) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00
2	10	Chronic Absenteeism (1000 3000 cont) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
2	11	Socioeconomically Disadvantaged (2120 cont) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00
2	12	African American (1310 1910 1930) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	13	Two or more Races (1310 1910 1930 ) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	14	Students with Disabilities (1310 1910 1930 ) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	15	Chronic Absenteeism (1000 3000 contr) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
2	16	Chronic Absenteeism (1000 3000 contr) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
2	17	Chronic Absenteeism (1000	Yes	\$0.00	\$0.00

		3000 contr) (repeated expenditure, Goal 1, Action 1)			
2	18	Chronic Absenteeism (1000 3000 contr) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
2	19	Homeless/Foster (1000 3000 contr) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
2	20	English Learner (1310 1910 1930) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	21	Assessments	No	\$0.00	\$0.00
2	22	Assessment	No	\$0.00	\$0.00
2	23	Assessments (2.1 5801 iCA Makers)	No	\$80,193.00	\$10,329.00
2	24	Assessments (2.1 2120 care team ) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00
2	25	Assessments (2.1 1110) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	26	Professional Development (2.2 1310 1910 1930) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	27	Professional Development (2.2 5801 iCA campmake contr)	Yes	\$68,698.00	\$20,000.00
2	28	Professional development (2.2 1110) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	29	English Learner (2.3 5200s PD) (repeated expenditure, Goal 1, Action 9)	No	\$0.00	\$0.00
2	30	English Learner (2.3 5801) (repeated expenditure, Goal 1, Action 2)	No	\$0.00	\$0.00
2	31	English Learner (2.3 1310 1910 1930 ) (repeated expenditure, Goal 1, Action	No	\$0.00	\$0.00

		1)			
2	32	Math curriculum (2.4 4100s contr) (repeated expenditure, Goal 1, Action 4)	Yes	\$0.00	\$0.00
2	33	Math curriculum (2.4 1110) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	34	Math Curriculum (2.4 2120 cont) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00
2	35	Middle school math curriculum (2.5 5801 iCA campmake cont) (repeated expenditure, Goal 2, Action 2)	Yes	\$0.00	\$0.00
2	36	Middle school math curriculum (2.5 4100s) (repeated expenditure, Goal 1, Action 3)	No	\$0.00	\$0.00
2	37	Middle school math curriculum (2.5 1110) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	38	Curriculum (2.6 1110 fac) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	39	Curriculum (2.6 2120 cont) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00
2	40	English learner (2.7 1310 1910 1930) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	41	English Learner (2.7 5801 iCA Educ supp) (repeated expenditure, Goal 1, Action 2)	No	\$0.00	\$0.00
2	42	English Learner (5801 iCA EL supp cont) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00
2	43	English Learner (2.8 5801 iCA EI suppt) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00

2	44	English Learner(2.8 facilitators) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	45	Extracurricular (2.0 1190 tutoring cont)	Yes	\$120,000.00	\$100,000.00
2	46	Extracurricular (2.9 5829 events contr)	Yes	\$29,300.00	\$26,989.00
2	47	Extracurricular (2.9 5801 iCA PD SEL and MTSS) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00
2	48	Extracurricular (2.9 1110) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	49	chronic absenteeism (2410 cont)	Yes	\$41,247.00	\$36,123.00
2	50	Chronic Absenteeism (2.10 5801 iCA sis team cont)	Yes	\$25,893.00	\$20,737.00
2	51	socioeconomically disadvantaged (2.11 1310 1910 1930) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	52	Socioeconomically disadvantaged (1110) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	53	African American (2.12 5801 cont) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00
2	54	African American (2120 care team contr) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00
2	55	Two or More races (2.13 5801 iCA PD SEL cont) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00
2	56	Two or More races (2.13 2120 care team salaries) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00
2	57	Students with disabilities (2.14 5801 iCA PD SeL	Yes	\$0.00	\$0.00

		contr) (repeated expenditure, Goal 1, Action 2)			
2	58	Students with Disabilities (2.14 2120 contr) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00
2	59	Chronic absenteeism (2.15 school leaders) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	60	chronic absenteeism (2.15 5801 iCA PD MTSS contr) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00
2	61	Chronic absenteeism (2.15 2410 classified contr) (repeated expenditure, Goal 2, Action 10)	Yes	\$0.00	\$0.00
2	62	Chronic absenteeism (2.16 1310 1910 1930 contri) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	63	Chronic absenteeism (2.16 5801 contr) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00
2	64	chronic absenteeism (2.16 2410 contr) (repeated expenditure, Goal 2, Action 10)	Yes	\$0.00	\$0.00
2	65	chronic absenteeism (2.17 1310 1910 1930 ) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
2	66	chronic absenteeism (2.17 5801 contr) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00
2	67	chronic absenteeism (2.17 2410 contr) (repeated expenditure, Goal 2, Action 10)	Yes	\$0.00	\$0.00
2	68	chronic absenteeism (2.18 1310 1910 1930) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00

2	69	chronic absenteeism (2.18 5801 contr) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00
2	70	chronic absenteeism (2.18 2410 contr) (repeated expenditure, Goal 2, Action 10)	Yes	\$0.00	\$0.00
2	71	Homeless/foster (2.19 2410 contr) (repeated expenditure, Goal 2, Action 10)	Yes	\$0.00	\$0.00
2	72	English learner (2.20 2120 contr) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00
3	1	Parent Communication surveys (1310 1910 1930) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
3	2	Parent Communication (1310 1910 1930) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
3	3	Professional Development (1310 1910 1930 ) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
3	4	Chronic Absenteeism (1000 3000 contr) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
3	5	Family Communication (1000 3000 contr) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
3	6	Socioeconomically Disadvantaged (1310 1910 1930) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
3	7	Students with disabilities (1310 1910 1930) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
3	8	Student with two or more races (1310 1910 1930)	No	\$0.00	\$0.00

		(repeated expenditure, Goal 1, Action 1)			
3	9	African American (1310 1910 1930) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
3	10	Homeless/Foster (1000 3000 contr) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
3	11	Parent communication surveys (3.1 5801) (repeated expenditure, Goal 3, Action 1)	No	\$0.00	\$0.00
3	12	Parent Communication surveys (3.1 5850 ) (repeated expenditure, Goal 3, Action 1)	No	\$0.00	\$0.00
3	13	Parent communication surveys (3.1 5900 ) (repeated expenditure, Goal 3, Action 1)	No	\$0.00	\$0.00
3	14	Parent communication (3.2 5801)	No	\$120,000.00	\$120,000.00
3	15	Parent communication (3.2 5850 stud info sys)	No	\$20,539.00	\$24,350.00
3	16	Parent communication (3.2 5900 telecom)	No	\$34,159.00	\$34,159.00
3	17	Professional development (3.3 1000 3000) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
3	18	Professional development (3.3 2120 contr)	Yes	\$58,153.00	\$20,000.00
3	19	Professional development (3.3 1000 3000 contr) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00
3	20	chronic absenteeism (3.4 1310 1910 1930) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
3	21	Chronic absenteeism (3.4 2410 contr) (repeated expenditure, Goal 2, Action 10)	Yes	\$0.00	\$0.00



3	22	chronic absenteeism (1110) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
3	23	socioeconomically disadvantaged (3.6 1110) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
3	24	socioeconomically disadvantaged (3.6 2120 contr) (repeated expenditure, Goal 3, Action 3)	Yes	\$0.00	\$0.00
3	25	students with disabilities (3.7 1110) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
3	26	Students with Disabilities (3.7 2120 contr) (repeated expenditure, Goal 3, Action 3)	Yes	\$0.00	\$0.00
3	27	Students with two or more races (3.8 1110) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
3	28	Students with two or more races (3.8 2120 contr) (repeated expenditure, Goal 3, Action 3)	Yes	\$0.00	\$0.00
3	29	African American (3.9 1110) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
3	30	african american (2120 contr) (repeated expenditure, Goal 3, Action 3)	Yes	\$0.00	\$0.00
3	31	Homeless/Foster (3.10 1110) (repeated expenditure, Goal 1, Action 1)	No	\$0.00	\$0.00
3	32	Homeless/Foster (3.10 2410 contr) (repeated expenditure, Goal 2, Action 10)	Yes	\$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)
\$1,401,395.00	\$1,466,982.50	\$1,401,395.00	\$65,587.50	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	4	English Learners access to curriculum (4100s core curric contrib)	Yes	\$148,000.00	\$128,000.00	0.00%	0.00%
1	5	Homeless/Foster (1000 3000 cont) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	6	Socioeconomically disadvantaged (1000 3000 contr) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	9	Professional Development (5200s contr)	Yes	\$92,000.00	\$92,000.00	0.00%	0.00%
1	11	Credentialing (1.1 1000 300 contrib)	Yes	\$97,741.00	\$122,988.00	0.00%	0.00%
1	13	CCSS Materials (1.2 2120 Care Team salaries and benes contrib)	Yes	\$597,061.00	\$654,622.00	0.00%	0.00%
1	15	CCSS Materials (1.2 5801 iCA PD SEL and MTSS cont)	Yes	\$131,835.00	\$123,508.00	0.00%	0.00%
1	16	CCSS Materials (1.2 5801 iCA EL support)	Yes	\$16,957.50	\$16,429.00	0.00%	0.00%

1	19	CCSS Materials (1.2 5801 iCA Makers contrib)	Yes	\$40,097.00	\$39,999.00	0.00%	0.00%
1	24	English learner access to curriculum (1.4 2120 care team contrib) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	26	English Learner access to curriculum (1.4 iCA EL support cont) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%
1	27	Homeless/foster (1.5 5801 iCA PD SEL and MTSS contr) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	2	Professional Development (2120 care team contr) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	3	English Learner (2120) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	4	Math curriculum (5200s cont) (repeated expenditure, Goal 1, Action 9)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	5	Middle school math Curriculum (5200s cont) (repeated expenditure, Goal 1, Action 9)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	6	Curriculum (4300s edmentum cont) (repeated expenditure, Goal 1, Action 4)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	7	English Learner (5200s cont) (repeated expenditure, Goal 1, Action 9)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	8	English Learner (2120) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	9	Extracurricular (2120 care team cont) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	10	Chronic Absenteeism (1000 3000 cont) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%

2	11	Socioeconomically Disadvantaged (2120 cont) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	15	Chronic Absenteeism (1000 3000 contr) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	16	Chronic Absenteeism (1000 3000 contr) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	17	Chronic Absenteeism (1000 3000 contr) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	18	Chronic Absenteeism (1000 3000 contr) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	19	Homeless/Foster (1000 3000 contr) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	24	Assessments (2.1 2120 care team ) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	27	Professional Development (2.2 5801 iCA campmake contr)	Yes	\$68,698.00	\$20,000.00	0.00%	0.00%
2	32	Math curriculum (2.4 4100s contr) (repeated expenditure, Goal 1, Action 4)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	34	Math Curriculum (2.4 2120 cont) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	35	Middle school math curriculum (2.5 5801 iCA campmake cont) (repeated expenditure, Goal 2, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	39	Curriculum (2.6 2120 cont) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	42	English Learner (5801 iCA EL supp cont) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	43	English Learner (2.8 5801 iCA EL suppt) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%

2	45	Extracurricular (2.0 1190 tutoring cont)	Yes	\$120,000.00	\$100,000.00	0.00%	0.00%
2	46	Extracurricular (2.9 5829 events contr)	Yes	\$29,300.00	\$26,989.00	0.00%	0.00%
2	47	Extracurricular (2.9 5801 iCA PD SEL and MTSS) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	49	chronic absenteeism (2410 cont)	Yes	\$41,247.00	\$36,123.00	0.00%	0.00%
2	50	Chronic Absenteeism (2.10 5801 iCA sis team cont)	Yes	\$25,893.00	\$20,737.00	0.00%	0.00%
2	53	African American (2.12 5801 cont) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	54	African American (2120 care team contr) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	55	Two or More races (2.13 5801 iCA PD SEL cont) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	56	Two or More races (2.13 2120 care team salaries) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	57	Students with disabilities (2.14 5801 iCA PD SeL contr) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	58	Students with Disabilities (2.14 2120 contr) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	60	chronic absenteeism (2.15 5801 iCA PD MTSS contr) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	61	Chronic absenteeism (2.15 2410 classified contr) (repeated expenditure, Goal 2, Action 10)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	63	Chronic absenteeism (2.16 5801 contr) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%

2	64	chronic absenteeism (2.16 2410 contr) (repeated expenditure, Goal 2, Action 10)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	66	chronic absenteeism (2.17 5801 contr) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	67	chronic absenteeism (2.17 2410 contr) (repeated expenditure, Goal 2, Action 10)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	69	chronic absenteeism (2.18 5801 contr) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	70	chronic absenteeism (2.18 2410 contr) (repeated expenditure, Goal 2, Action 10)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	71	Homeless/foster (2.19 2410 contr) (repeated expenditure, Goal 2, Action 10)	Yes	\$0.00	\$0.00	0.00%	0.00%
2	72	English learner (2.20 2120 contr) (repeated expenditure, Goal 1, Action 2)	Yes	\$0.00	\$0.00	0.00%	0.00%
3	4	Chronic Absenteeism (1000 3000 contr) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
3	5	Family Communication (1000 3000 contr) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
3	10	Homeless/Foster (1000 3000 contr) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
3	18	Professional development (3.3 2120 contr)	Yes	\$58,153.00	\$20,000.00	0.00%	0.00%
3	19	Professional development (3.3 1000 3000 contr) (repeated expenditure, Goal 1, Action 1)	Yes	\$0.00	\$0.00	0.00%	0.00%
3	21	Chronic absenteeism (3.4 2410 contr) (repeated expenditure, Goal 2, Action 10)	Yes	\$0.00	\$0.00	0.00%	0.00%

3	24	socioeconomically disadvantaged (3.6 2120 contr) (repeated expenditure, Goal 3, Action 3)	Yes	\$0.00	\$0.00	0.00%	0.00%
3	26	Students with Disabilities (3.7 2120 contr) (repeated expenditure, Goal 3, Action 3)	Yes	\$0.00	\$0.00	0.00%	0.00%
3	28	Students with two or more races (3.8 2120 contr) (repeated expenditure, Goal 3, Action 3)	Yes	\$0.00	\$0.00	0.00%	0.00%
3	30	african american (2120 contr) (repeated expenditure, Goal 3, Action 3)	Yes	\$0.00	\$0.00	0.00%	0.00%
3	32	Homeless/Foster (3.10 2410 contr) (repeated expenditure, Goal 2, Action 10)	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)
\$5,689,772.00	\$1,401,395.00	0.00%	24.63%	\$1,401,395.00	0.00%	24.63%	\$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).

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