

Charter Leaders Meeting

May 18, 2023

Recording



Welcome!

SCCOE's Charter Schools Department:

- Mefula Fairley– Executive Director
- Justin Fallon – Administrative Assistant IV
- Michelle Johnson, Ed.D. – Associate Director
- Matthew Daugherty – Administrator
- Shallu Sharma – Financial Administrator
- Cynthia Tapia – Financial Administrator

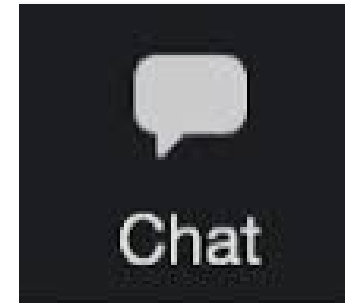
Introductions and Check-in

- School or CMO Name
- What word or phrase summarizes this school year?



Zoom Protocols

- Please mute microphones
- Use the "Chat" for questions
- Use "Raise Hand" to share



Agenda

- Welcome
- Continuous Improvement and Accountability
- Fiscal Updates
- Program Updates
- Celebrations and Shout Outs



Assessment, Accountability, State & Federal Updates Charter Schools Meeting - May 18, 2023

Continuous Improvement & Accountability Dept.
Professional Learning & Educational Progress Division

Presented by: Dr. Dawn River

Access Resources in the Meeting Public Folder: <https://bit.ly/AA-SF2022-23>

Williams Compliance for 2023-24

- There will be Williams Compliance for 2023-24
 - SCCOE will collect documents
 - Facilities visits will take place
 - Materials sufficiency visits to sites will take place
- The list from CDE has been delayed
 - Because the CSI/ATSI list is so big, there has been advocacy by CCS, LACOE, Public Advocates & ACLU to repeat the 2022-23 list in 23/24
- SCCOE will hold an informational virtual meeting on June 1

Date: Thursday, June 1, 2023 **Time:** 9:00am - 10:30am

Registration link: <https://sccoe.zoom.us/j/92073056355>

Williams List: *Proposed* Timeline*

2021-22

CDE generates Williams Report for 2022-23 through 2024-25 school years.

2027-28

CDE generates Williams Report for 2028-29 through 2030-31 school years.

2022-23

2023-24

2024-25

2025-26

2026-27

2027-28

2024-25

CDE generates Williams Report for 2025-26 through 2027-28 school years.

Consolidated Application ConApp/CARS

Winter Data Collection is finally here:

- ★ Open date is anticipated to be May 19
- ★ The deadline for submission is June 9
 - **This is only a 3 week window! (half the normal window)**
- ★ List of data windows: [2022-23 Winter Collection](#)

Spring Data collection is not expected to open until August/September

- This will be the window to apply for funding of Title Grants
- This will also be the collection for Federal Addendum and assurances

Federal Program Monitoring (FPM) 2023-24

- Reviews - 3 LEAs from Santa Clara County selected for online reviews
- Cycle B - Onsite <https://www.cde.ca.gov/ta/cr/cyclebleassel.asp>
- Cycle D - Online <https://www.cde.ca.gov/ta/cr/cycledleaseel.asp> (Santa Clara County)
- Superintendents of selected districts were notified April 20, 2023
- 2023-24 Program Instruments are not posted yet
- Annual Training will be in early August, 2023



Comprehensive Support and Improvement (CSI) & Additional Targeted Support & Improvement (ATSI) Workshop on April 17, 2023

Resources that we shared:

<https://bit.ly/CSIATSI2023SCCOE>

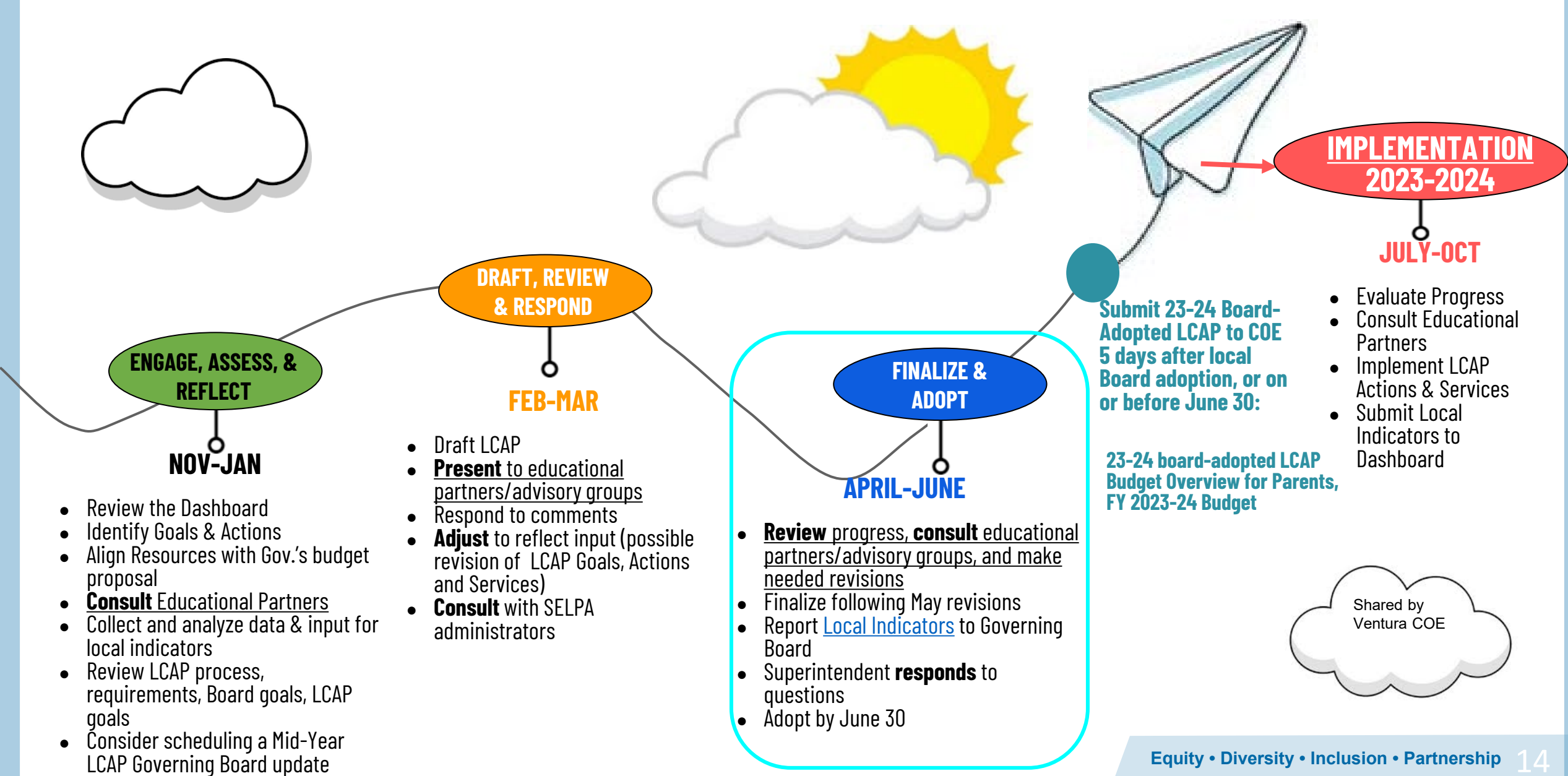


Prop. 28 Updates



- ❖ **Timeline for funding allocations:** First (1st) allocation “will occur later” than normal in 2023-24
 - This is because it won’t be calculated until after the budget act is passed
- ❖ **Funding Allocation:** Directly to the LEA and must be distributed in the predetermined amounts to school sites, calculated by CDE. Preliminary *estimates*, district totals and by school, [here](#).
- ❖ **Restrictions for use (so far):**
 - LEAs with more than 500 pupils must expend at least 80 percent of the funds to employ certificated or classified employees to provide arts education instruction and the remaining funds for training supplies, curriculum, professional learning, materials, and arts educational partnership programs.
 - No more than one percent of Arts & Music in Schools (AMS) funds may be expended on administrative costs.
 - Funds are meant to increase what is already in place -- not to replace the funding.
- ❖ **Funds are subject to audit** (EC 41020)
- ❖ **Reporting Requirements:** Each school is required to submit an annual board-approved report to be posted on the school district's and Department of Education's websites that details the type of arts education programs funded by the program; the number of full-time equivalent teachers, classified personnel, and teaching aides; the number of pupils served; and the number of school sites providing arts education programs with such funds.

Suggested LCAP Development Timeline



ENGAGE, ASSESS, & REFLECT

NOV-JAN

- Review the Dashboard
- Identify Goals & Actions
- Align Resources with Gov.'s budget proposal
- **Consult** Educational Partners
- Collect and analyze data & input for local indicators
- Review LCAP process, requirements, Board goals, LCAP goals
- Consider scheduling a Mid-Year LCAP Governing Board update

DRAFT, REVIEW & RESPOND

FEB-MAR

- Draft LCAP
- **Present** to educational partners/advisory groups
- Respond to comments
- **Adjust** to reflect input (possible revision of LCAP Goals, Actions and Services)
- **Consult** with SELPA administrators

FINALIZE & ADOPT

APRIL-JUNE

- **Review** progress, **consult** educational partners/advisory groups, and make needed revisions
- Finalize following May revisions
- Report Local Indicators to Governing Board
- Superintendent **responds** to questions
- Adopt by June 30

Submit 23-24 Board-Adopted LCAP to COE 5 days after local Board adoption, or on or before June 30:

23-24 board-adopted LCAP Budget Overview for Parents, FY 2023-24 Budget

IMPLEMENTATION 2023-2024

JULY-OCT

- Evaluate Progress
- Consult Educational Partners
- Implement LCAP Actions & Services
- Submit Local Indicators to Dashboard

Shared by
Ventura COE

LCAP ENGAGEMENT REMINDERS

With whom are charter schools required to consult? (Posted 08-Jan-2018)

As in the case of districts and COEs, statute provides the minimum consultation requirements for charter schools. Charter schools are required to consult with parents (including at least one parent of a SWD), students, principals, teachers, administrators, and other school personnel in accordance with *EC* Section 47606.5 (e) as part of the development of the LCAP.

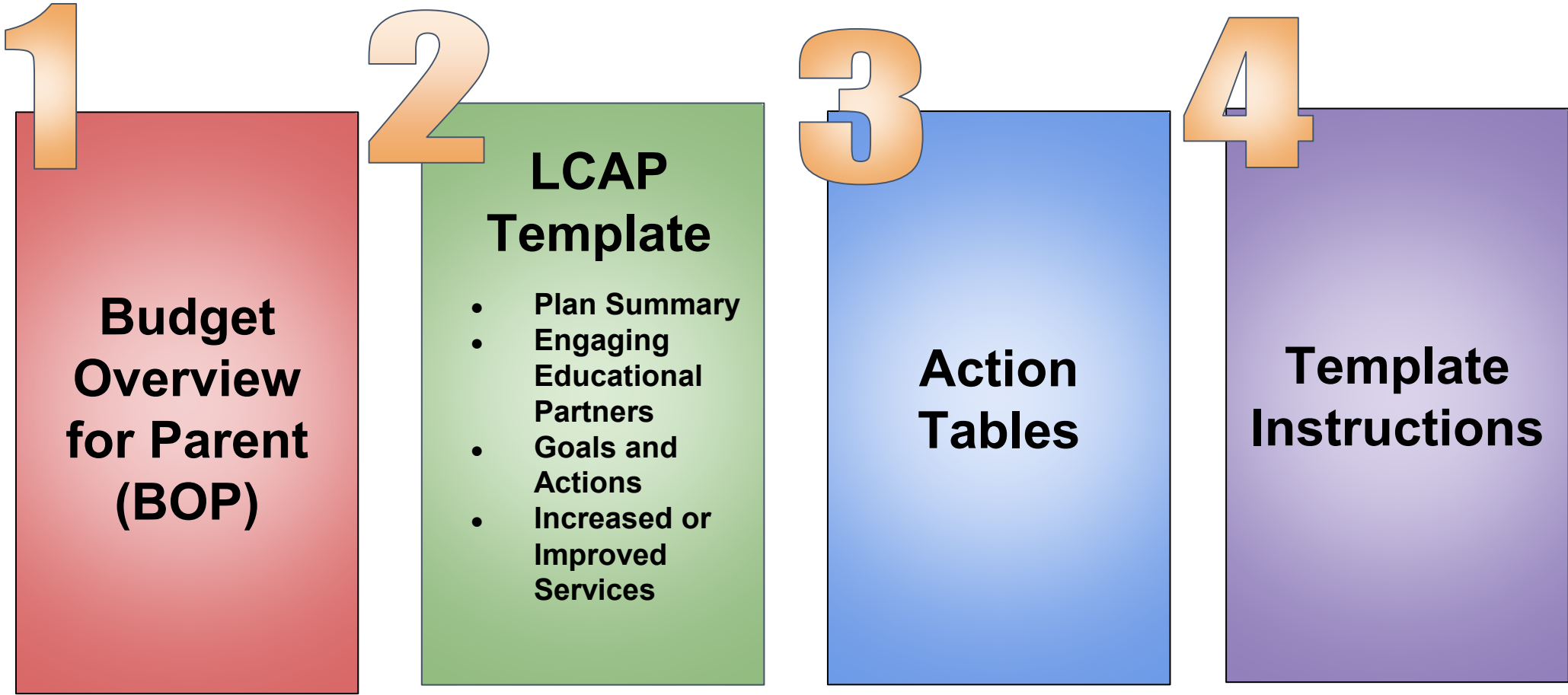
Does the charter school governing body need to hold a public hearing to adopt the LCAP and annual update? (Reviewed 08-Jan-2018)

The statute is silent; however, charter schools are required to consult with teachers, principals, administrators, other school personnel, parents, and pupils in developing the LCAP and annual update (*EC* Section 47606.5(e)). Charter schools are encouraged to follow a process similar to that required for a school district, which is to hold an initial public hearing to solicit recommendations and comments on the LCAP and annual update, followed by a subsequent public meeting for adoption of the plan, before submitting the adopted LCAP to the charter authorizer.

Public Hearing & Adoption

- Public Hearing (if you hold one for LCAP) and Adoption must be at separate meetings before June 30
- Local indicators presented at the LCAP Adoption meeting
- Adopted LCAP due to authorizer within 5 days of adoption
- Federal Addendum does not have a required adoption date but must be updated annually & shared with DELAC
 - ◆ NOTE: use of federal funds requires an annually adopted plan
 - ◆ the date of adoption is reported in CARS
- Application for funding must be shared with DELAC and approved by local boards before August 31
 - ◆ the date of adoption is reported in CARS

Completed 2023-24 LCAP Packet



QUESTIONS

Charter Schools Department

Fiscal Team Updates

Shallu Sharma, Financial Administrator
Cynthia Tapia, Financial Administrator

2023-24 May Revision

▪ Economic Outlook

- Overall, \$31.5 Billion Deficit
 - Increased from \$22.5 billion budget gap in the Governor's proposed budget
- Drivers
 - Reduced revenues
 - Heightened economic uncertainty
 - Federal and state delays in tax filings



Image Source SSC 2022 May Revision Workshop

2023-2024 May Revise Overview

- 8.22% COLA Adjustment for LCFF
 - Increased from 8.13% from the Governor’s Proposed Budget

Grade Span	2022-23 Base Grant per ADA*	8.22% COLA	2023-24 Base Grant per ADA
TK-3	\$9,166	\$753	\$9,919
4-6	\$9,304	\$765	\$10,069
7-8	\$9,580	\$787	\$10,367
9-12	\$11,102	\$913	\$12,015
*Average daily attendance (ADA)			

Source: School Services California

2023-2024 May Revise Overview

- Arts, Music, and Instructional Materials (AMIM) Discretionary Block Grant
 - \$3.6B in 2022-23 Enacted Budget reduced to \$1.8B at May Revise
- 2022-23 Learning Recovery Emergency Block Grant
 - \$7.9B in 2022-23 Enacted Budget reduced to \$5.4B at May Revise
- Arts and Music in School Funding (Prop 28)
 - \$8M reduction in the May Revise for a total support of \$933M

2023-2024 May Revise Overview

- Maintains Equity Multiplier but with more accountability
- TK eligibility expansion costs
- Expanded Learning Opportunities Program (ELOP)
 - Time to expend ELOP funding from June 30, 2023, to June 30, 2024.
- Fully funds the Universal Schools Meals program

Standardized Account Code Structure (SACS) Web Based Financial Reporting System

- For FY 2022-23, charter school unaudited actuals reporting will be available in the SACS Web System
- All charter schools will report 2022-23 UA financial data, whether SACS or ALT Form, in the SACS Web System
- The Charter Alternative (ALT) Form will be available in SACS Web for UA Reporting in June or the beginning of July 2023
- CDE is in the process of developing a training program for UA

Source: <https://www.cde.ca.gov/fg/ac/ac/sacsforumrecap.asp>

Standardized Account Code Structure System Roles

Edit Draft Dataset	Basic dataset editing abilities in draft area; can delete and share a draft dataset.
Edit Dataset	Basic dataset editing abilities in submission area; can request to promote a dataset from draft to submission.
Dataset Approval	Approve and promote a dataset from draft to submission, and from submission to oversight entity.
Oversight (Authorizer Role)	Review or edit a submission for which the entity has oversight responsibilities; validates the fiscal solvency status. Also publish LEA budget and <u>interim data and submit request to CDE to submit unaudited actuals data.</u>
Certify/Promote to CDE (SCCOE Role)	Certify and promote (submit) unaudited actuals data to CDE; can only be assigned by CDE. (Formerly eTransferaccess users.)
User Management	Manages user accounts for associated entities
Administration	Superuser for associated entities

Source: <https://www.cde.ca.gov/fq/sf/fr/>

Standardized Account Code Structure System Roles

SACS Standardized Account Code Structure System

Login

Email Address

Password

NOTICE: By clicking Login, you are about to access the Standardized Account Code Structure System of the State of California Department of Education ("the Department"). This system is intended for authorized users only. Unauthorized access to or use of this system, or any information therein, is prohibited.

Agree to the Terms of Service

[I forgot my password](#)

Next Steps...

- Charter School/CMO will receive an email with a Google Form
- Charter School/CMO Charter School/CMO will identify **ONE** contact person
- CSD Fiscal Team will assign the following roles:
 - Edit Draft Dataset
 - Edit Dataset
 - Dataset Approval
 - **User Management**
 - Administration
- Charter School/CMO **User Management** role will assign additional users

FCMAT Fiscal Health Risk Analysis (FHRA) Tool Update

- SCCBOE-authorized charter schools completed FHRA tool
- SCCOE collected feedback about the FHRA and share it with FCMAT:
 - Score breakdown by section
 - Self-assessment notes section
 - Differentiation of the FHRA tool for charter school that is part of a Charter Management Organization (CMO)
- Next Steps
 - FHRA tool is part of the Charter Petition Renewal Application and Annual Fiscal Oversight visit
 - Charter schools will need to submit a completed FHRA tool at least two weeks prior to the scheduled Annual Fiscal Oversight visit
 - Additional supporting documents may be requested as necessary when assessing FHRA responses

2023-24 BOP Budget LCAP Crosswalk

LCFF Budget Overview for Parents Data Input Sheet

Local Educational Agency (LEA) name:	Sample District
CDS code:	3011111000000
LEA contact information:	Employee Contact, Title, Email Address, Phone Number
Coming School Year:	2023-24
Current School Year:	2022-23

*NOTE: The "High Needs Students" referred to in the tables below are Unduplicated Students for LCFF funding purposes.

Projected General Fund Revenue for the 2023-24 School Year		Amount
Total LCFF funds	\$	61,597,301
LCFF supplemental & concentration grants	\$	3,243,868
All other state funds	\$	12,618,105
All local funds	\$	721,529
All federal funds	\$	6,027,613
Total Projected Revenue	\$	80,964,548

Total Budgeted Expenditures for the 2023-24 School Year		Amount
Total Budgeted General Fund Expenditures	\$	85,803,961
Total Budgeted Expenditures in the LCAP	\$	38,401,009
Total Budgeted Expenditures for High Needs Students in the LCAP	\$	3,243,868
Expenditures not in the LCAP	\$	47,402,952

Expenditures for High Needs Students in the 2022-23 School Year		Amount
Total Budgeted Expenditures for High Needs Students in the LCAP	\$	3,360,455
Actual Expenditures for High Needs Students in LCAP	\$	3,360,455

Adopted Budget – LCFF Calculator

	2022-23	2023-24
3 SUMMARY OF FUNDING		
50 Base Grant (Excludes add-ons for TIIG and Transportation)	52,970,603	57,626,530
51 Supplemental and Concentration Grant funding in the LCAP year	3,243,868	3,243,868
52 Percentage to Increase or Improve Services	6.34%	5.63%

Adopted Budget – Alternative Form

Description	Object Codes	2023-24 Budget		Total Fund col. D + E (F)
		Unrestricted (D)	Restricted (E)	
A. REVENUES				
1) LCFF Sources	8010-8099	61,597,301.00	0.00	61,597,301.00
2) Federal Revenue	8100-8299	0.00	6,027,613.00	6,027,613.00
3) Other State Revenue	8300-8599	1,241,920.00	85.00	12,618,105.00
4) Other Local Revenue	8800-8799	721,529.00	0.00	721,529.00
5) TOTAL, REVENUES		63,560,750.00	17,403,798.00	80,964,548.00

Description	Object Codes	2023-24 Budget		Total Fund col. D + E (F)
		Unrestricted (D)	Restricted (E)	
B. EXPENDITURES				
9) TOTAL, EXPENDITURES		82,242,237.00	3,159,724.00	85,401,961.00

Adopted LCAP – 2022-23 Action Tables

2022-23 Contributing Actions Annual Update Table

6. Estimated LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Expenditures for Contributing Actions (LCFF Funds)	8. Difference Between Expenditures and Contributions (Subtotal)
\$3,360,455	\$3,360,455.00	\$3,360,455.00	

Adopted LCAP – 2023-24 Action Tables

2023-24 Total Expenditures Table

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
Totals	\$32,163,157.00	\$3,799,492.00	\$49,368.00	\$48,670,000.00	\$38,401,009.00

2023-24 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)
57,020,530	3,243,868	5.63%	0.00%	5.63%	\$3,243,868.00

Source: CA County of Superintendents 2023 LCAP Training
<https://ccsesa.org/local-control-and-accountability-plan-lcap-approval-manual-2023-24-edition/>



Upcoming Deadlines

Description	Deadline
SB740 2023-24 Application	06/02/2023
Adopted Budget <ul style="list-style-type: none">FCMAT LCFF Calculator	07/01/2023
Local Control Accountability Plan <ul style="list-style-type: none">LCAP Action Tables in Excel format	07/01/2023
Other misc. documents <ul style="list-style-type: none">Updated/revised fiscal policiesAttendance CalendarUpdated Lease and/or Facility Use AgreementCopies of Bonds and ContractsStudent and Employee HandbookUpdated Finance and Business Operation Manager contact listComplete duplicate originals of Insurance Policy	07/01/2023
Attendance Calendar	07/01/2023



Charter Schools Department

Program Team Updates

Mefula Fairley, Executive Director
Michelle Johnson, Ed.D, Associate Director
Matt Daugherty, Administrator



Annual Visit Reports – Common Themes

- Glows
 - LCAPs are better connected to the charter programs
 - There is more alignment between priorities and instruction
 - More use of Mental Health and Wraparound services to support students
 - Site visit scheduling process was more streamlined
- Grows
 - ELD – both integrated and designated – needs more alignment and implementation
 - Safety Plans need First Responder review and signatures
 - Student engagement – increase student voice

2023-24 Credential Review

- CSD is taking point on the review
- CSD will send out spreadsheet requesting info in early August to give to credential office
 - Master schedule
 - Teacher roster
 - Credentials
- Credential office will follow up with schools
- CSD will report credential info to SCCBOE in November



Renewal Timelines*

Renewal Petition Review:

- 60 days after submission, public hearing held
- 90 days after submission, decision hearing held
- 15 days prior to decision hearing, findings and recommendations published

Sample Possible Timeline:

- Submission to SCCOE: August 13, 2023 - start 90 days clock
- SCCOE public hearing: September 20, 2023 – within 60 days
- Site visit: September 21, 2023
- Post Recommendations: October 31, 2023
- SCCOE decision: November 15, 2023 - now have 30 days to appeal to ACCS

Watch SCCBOE meeting calendar

5 schools up for renewal in 2023-24 (Bullis, AJHS, RBM, RSA, RSSP)

4 district schools possible for appeal



* Watch for SB 739 possible 1-year extension to all charter terms





Communication

- Keep us in the loop!

2023-24 Charter Leader Meetings

Save-the-Date

- October 12, 2023

Meeting Location: Virtual